

ShiftTools user guide

Everything ShiftTools does, and how to use it. The floorplan has a one-minute tour too: choose **Help** in its top bar.

Contents

- | | |
|--------------------------------|---------------------------|
| 1. What ShiftTools does | 8. People |
| 2. Getting started | 9. Tasks |
| 3. Finding your way around | 10. Finance |
| 4. Using the floorplan | 11. For managers |
| 5. Notes, sickness and absence | 12. The daily tasks email |
| 6. The kitchen screen | 13. Help and fixes |
| 7. Training | 14. Words used here |

What ShiftTools does

ShiftTools is where each restaurant plans who is on which station for the shift. It reads the rota from **LifeLenz**, so everyone who is working appears automatically, and you place them on the floorplan. It also keeps notes on shifts, plans breaks, shows training that is due, and sends a daily list of tasks.

If you're on shift

EVERYONE

1. Open your store from the Stores page.
2. Enter the store password.
3. Find your name and your position on the floorplan.
4. Take the tour from **Help** if it's your first time.

If you plan the shift

EVERYONE

1. Pick the date and shift.
2. Press **Auto-assign**, then drag people to tidy up.
3. Check the **Breaks** view.
4. Print it, or leave it on the kitchen screen.

If you manage the store

MANAGERS

1. Sign in with your email address.
2. Change stations and slots with the **cog** (Edit layout) on the floorplan.
3. Check **Training** each week (it is on your store's bar).
4. Set up the daily tasks email in Store settings.

Everything it does

FEATURE	WHAT IT DOES	WHO
Floorplan	Place everyone on the shift onto stations and positions, by drag and drop or by clicking.	Store password

FEATURE	WHAT IT DOES	WHO
Shifts from LifeLenz	Everyone rostered for the date and shift appears in the "To place" list, refreshed every 5 minutes.	Store password
Auto-assign	Places people on stations using their LifeLenz positions.	Store password
Clocked-in colours	Each name shows if they are clocked in, ending soon, or not in yet.	Store password
Add, edit and remove shifts	Cover someone who isn't on the rota, or change times, on this floorplan only.	Store password
Saved automatically	Every change saves by itself and is shared with every screen. Undo and redo are built in.	Store password
Hourly sales and labour	Projected against actual sales, and scheduled against actual labour %, from LifeLenz.	Store password
Shift targets	The day's four targets above the floorplan, with focus areas on their own view.	Store password
Break planner	Who needs a break and a suggested time, staggered by station.	Store password
Shift notes	Read, add or edit the note on any shift; a note icon shows on the name.	Store password
Mark sick or absent	Takes someone off the floorplan, can change their shift to sickness or unauthorised absence in LifeLenz, and can add a note to their next shift.	Store password
Print	The whole floorplan on one A4 landscape page.	Store password
Screenshot	Downloads the floorplan as a picture.	Store password
Kitchen screen	A full-screen, hands-off floorplan for a TV that follows the day by itself.	Store password
Store bar and Go to	Every page for a store has a bar with its Floorplan, Training, People, Tasks, Finance, Settings and Kitchen screen. Press  from any page to jump to any store or page.	Everyone
Light and dark mode	Choose with the moon or sun button.	Everyone
Tour and guide	Step-by-step tours of the home page, floorplan, store settings and training, and this guide.	Everyone

FEATURE	WHAT IT DOES	WHO
Training	Verifications overdue or due, crew trainer progress, and training opportunities, from the weekly MyTraining report.	Store password
People	Turnover, staffing, recruitment, new starters' on-boarding and HIG chats (with notes on their next shift) and leavers, from the weekly Hiring & Turnover report.	Store password
New starters' e-learning	Shows each new starter's SRI e-learning, workplace violence prevention, Creating Belonging and Allergen Awareness, and puts what is outstanding on their next shift (first shift for the first two, day 14 to day 30 for the others).	Store password
Tasks	A to-do list for managers: departments with leads, tasks given out and handed over, repeating tasks, each manager's week with their LifeLenz shifts to plan their days, and a follow-up of what is done, due and overdue.	Managers
Plan notes for next shifts	Adds "Verification renewals" notes to people's next shifts so they show in the tasks emails.	Store password
Edit layout	Change stations, slots, names and columns without leaving the floorplan.	Managers
Store settings	Layout, targets, tasks email, floorplan password and LifeLenz connection.	Managers
Daily tasks email	Each morning, the day's shift notes grouped by Breakfast, Lunch, Dinner and Overnight, with a one-page A4 PDF to print.	Managers
Weekly tasks email	The next 7 days' tasks in one email and one A4 page.	Managers
Suggestions	Anyone can send an idea, with optional contact details.	Everyone
Other tools	Just Eat invoices, and badges and fundraising.	Everyone
Stores and users	Admins see every store's health at a glance, add stores, and approve and manage managers.	Admins

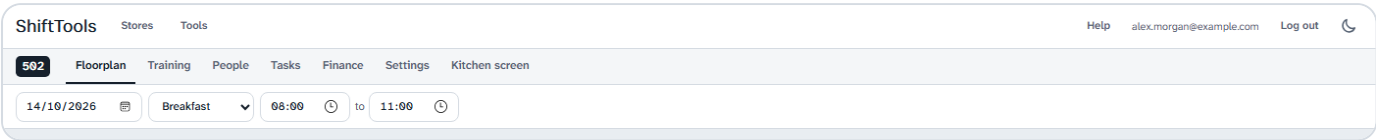
Getting started

Opening your floorplan EVERYONE

1. Go to the Stores page and choose your store, or go straight to your store's address.
2. Type the **store password** and press **Unlock**. Ask your manager if you don't know it.
3. The floorplan opens on today's date and the Breakfast shift.

Your browser remembers the password for a while. The same password opens the store's Training pages.

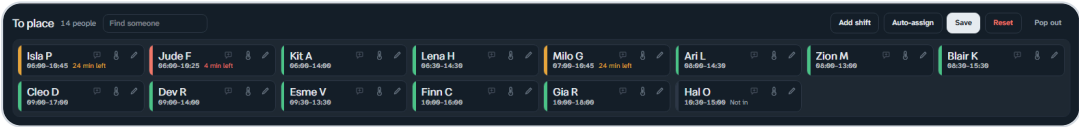
The top bar



The floorplan's three bars: the site (Stores, Tools, Help, you), this store and where else you can go in it, then the date and shift.

The floorplan has the same two bars as every other page, so you always know where you are and how to get anywhere else. Under them are the date and shift controls for this page.

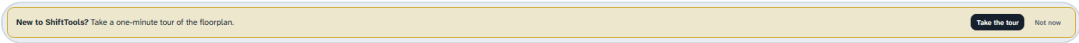
- **Top bar:** **Stores** (the list of all stores), **Tools**, **Help**, who is signed in and **Log out** (or **Manager sign in**), and the moon / sun button for light and dark mode.
- **Store bar:** the store, then **Floorplan** (underlined, because that is where you are), **Training**, **People** and the **Kitchen screen** (the TV view). Managers who are signed in also see **Tasks**, **Finance** and **Settings**. It is the same bar as on the store's other pages (see Finding your way around).
- **Date, shift and times:** which shift you're looking at. They stay at the top as you scroll. Managers also have a **cog** next to Print and Screenshot to edit the layout.
- **Help:** the tour and this guide (more on that below).



Dark mode, which many people find easier on a screen in a dim kitchen. The choice is remembered.

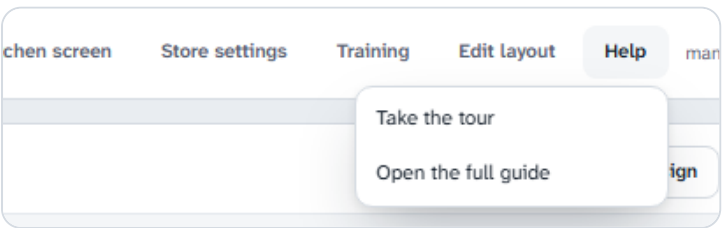
Take the tour

The floorplan has a one-minute **guided tour**. The first time you open it, a bar offers it to you; you can say **Not now** and take it later.



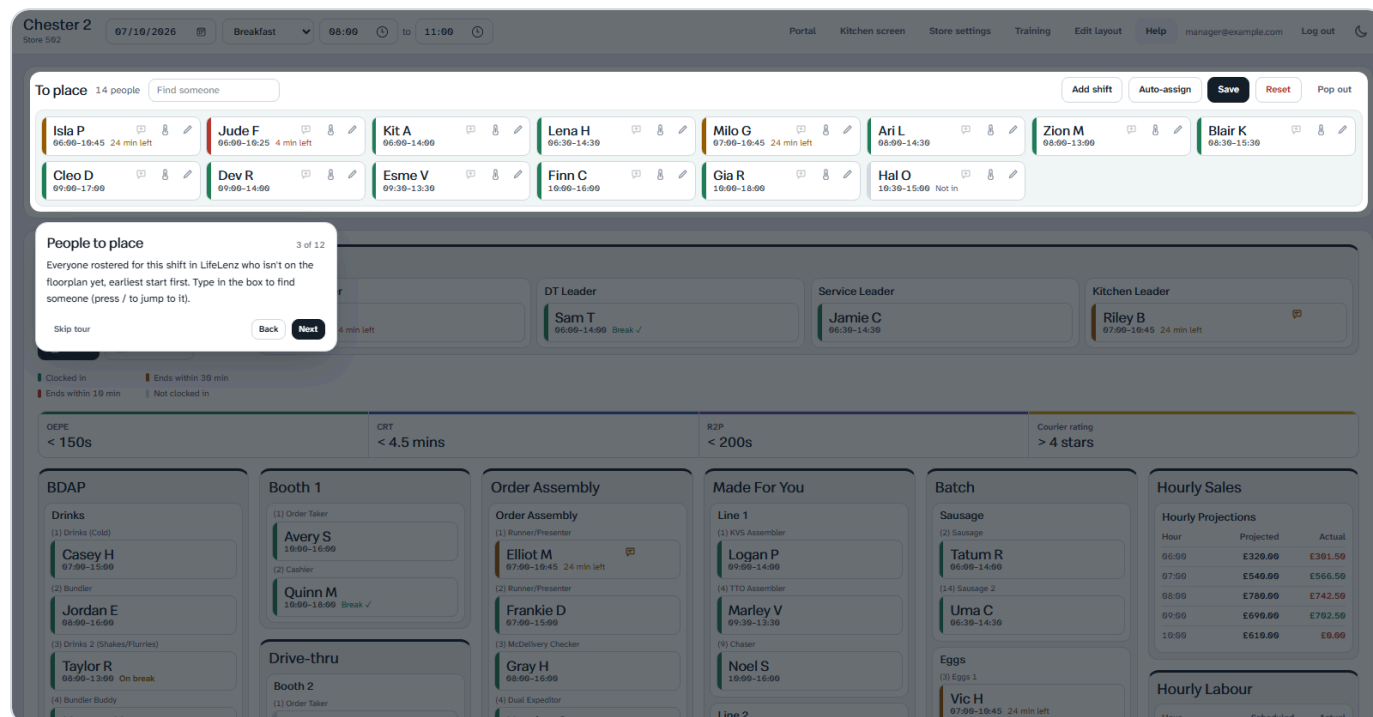
The offer of the tour, shown once on your first visit.

To start it any time, choose **Help** in the top bar, then **Take the tour**. The same menu has **Open the full guide**, which is this page.



The Help menu.

The tour dims the page and highlights one part at a time with a short explanation. Press **Next** (or the right arrow key) to move on, **Back** to go back, and **Skip tour** or **Esc** to stop.



A step of the tour: People to place is highlighted and explained.

The **home page** (the store list), **Store settings**, **Training** and **People** have their own tours too. Press **Take the tour** at the top right of any of them. The home page tour covers choosing your store, the top menu, signing in, the guide button and the suggestion box. Like the floorplan's, each is offered once the first time you open it (in each browser), and works the same way.

Manager accounts MANAGERS

Managers sign in with their **email address** and a password, and can change layouts, targets and settings for their store, and use its Training and People pages. **You don't need an account just to use the floorplan**: open your store and type its password.

1. Choose **Manager sign in** at the top right, then **Create one**.
2. Enter your **work email address** (that is your username), choose a password (**Show** lets you check what you typed), and pick **the store you manage**. If you manage more than one, pick one now and an admin can add the others.
3. Press **Create my account**. A page tells you what happens next: an admin has been asked to approve it, usually the same day.
4. Until it's approved, signing in says your account is waiting for approval (your email and password are fine). ShiftTools doesn't email you when it's done, so try again later.

Create a manager account

For restaurant managers. An account lets you change your store's floorplan layout and settings, and use its Training and People pages.

- 1 Fill in this form**
It takes about a minute.
- 2 An admin approves your account**
Usually the same day. You can't sign in until then, and that's normal.
- 3 Sign in**
With the email address and password you choose below.

Just using the floorplan? You don't need an account. Open your store from the Stores page and type its password (ask your manager).

Your email address

Your work email. This is your username when you sign in.

Choose a password

Use one you don't use anywhere else. You'll need it every time you sign in.

The store you manage

If you manage more than one, choose one now. An admin can add the others.

Already have an account? [Sign in](#)

Creating a manager account: your email address is your username.

It doesn't matter whether you use capital letters when you type your email to sign in. If you manage more than one store, an admin can add the others to your account.

Suggestions and what's new EVERYONE

On the Stores page, **Send a suggestion** lets anyone share an idea. You can leave an email address or phone number so we can reply, or leave it blank. **What's new** at the bottom lists recent changes. **Tools** in the top menu has the other tools.

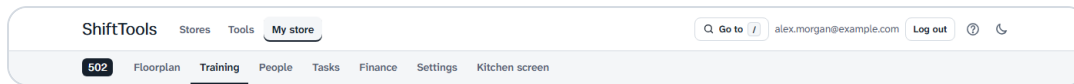
This guide is always one click away: the **?** button at the top right, next to Log out (or Manager sign in), opens it from any page.

Finding your way around EVERYONE

The site has one set of places, laid out the same way on every page.

The two bars

Every page, including the floorplan, has the same two bars at the top.

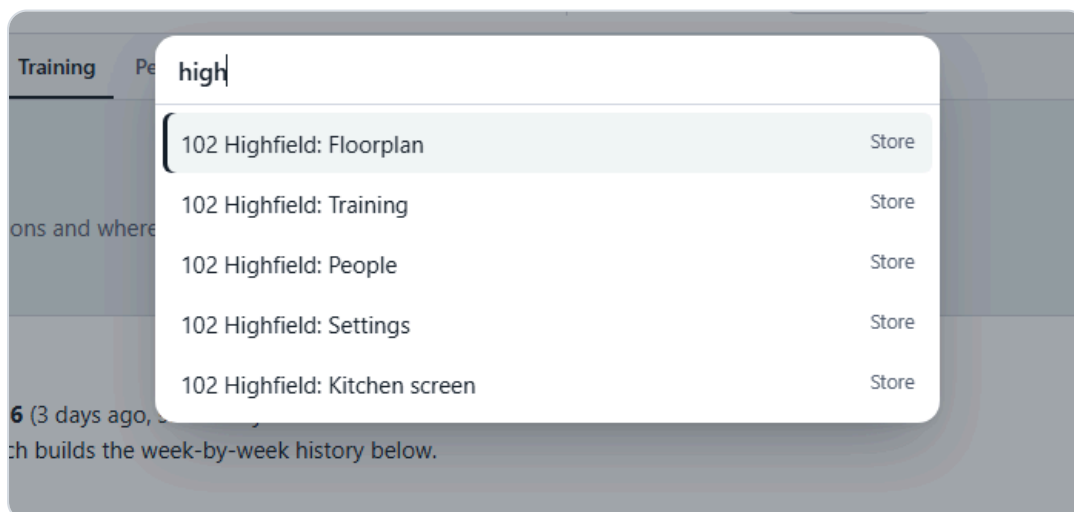


The top bar, and under it the store bar: the store number, then Floorplan, Training, People, Tasks, Finance, Settings and Kitchen screen. The page you are on is underlined.

- **The top bar is the whole site.** **Stores** is the home page where you choose a store, **Tools** has the other tools, and on the right are **Go to**, your sign-in, the guide (?) and the light/dark button. Admins also see an **Admin** menu with **Store admin**, **Users** and **Suggestions**. **My store** takes a signed-in manager straight to their store.
- **The store bar is the store you are in.** It names the store and lists its places: **Floorplan**, **Training**, **People**, **Tasks**, **Finance**, **Settings** and **Kitchen screen**. It stays on every page for that store, so you never have to go back to the home page and choose again.
- **Tasks**, **Finance** and **Settings** are only there for managers of the store (and admins).
- If you look after more than one store, the store's name is a list. Choose another store and you stay on the same page for it (Training stays Training). The Training and People buttons on the Stores page show every store's reports side by side.
- The page's own tabs (for example My week, Team, Follow-up and Setup on Tasks) are underneath, next to the page's title.

Go to

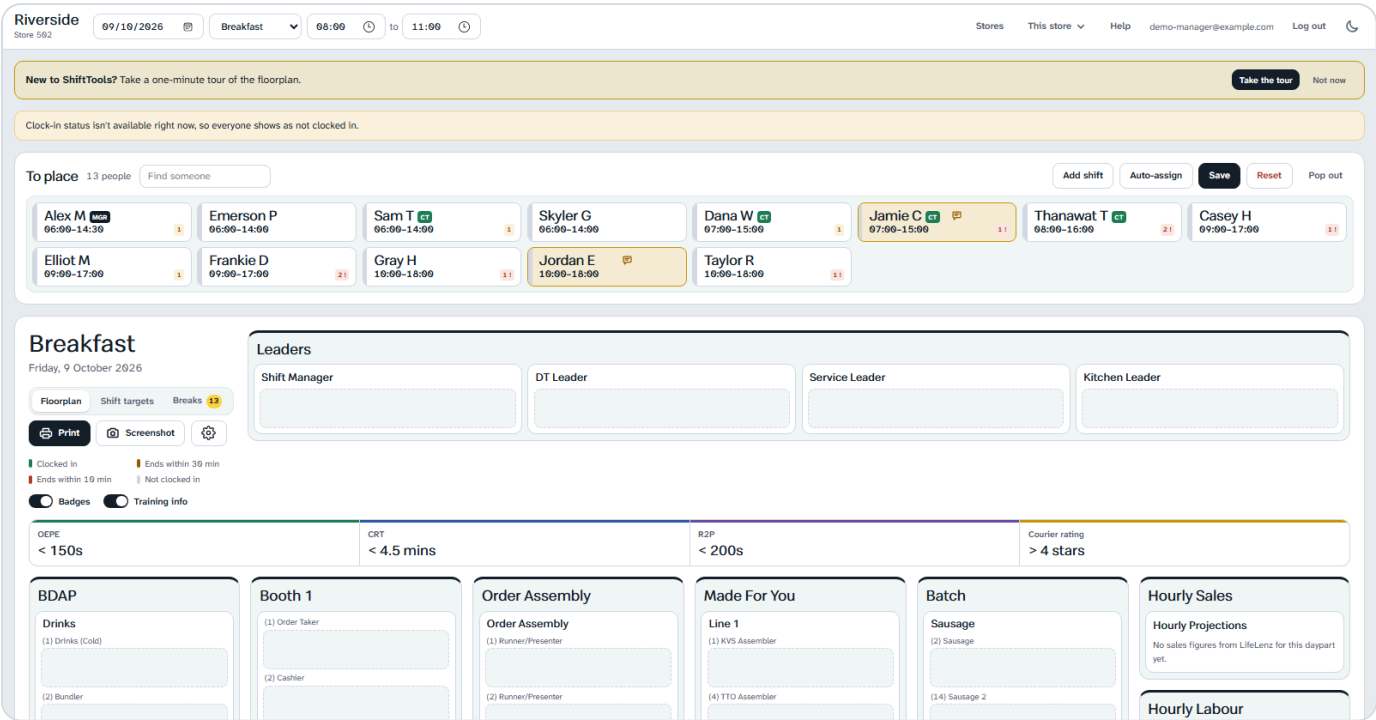
Press **/** on any page (or **Ctrl** + **K**, or the **Go to** button in the top menu), type a bit of a store's name or number or the page you want, and press **Enter**. Use the up and down arrow keys to choose another match, and **Esc** to close it. It only lists places; anything private still asks for the store password or a manager sign-in when you arrive. On this guide page **/** goes to the guide's own search, so use **Ctrl** + **K** here.



Go to: typing "high" lists the places for Highfield.

Using the floorplan

This is the main screen. Everyone on the shift is in the **To place** list at the top, and the stations are below.



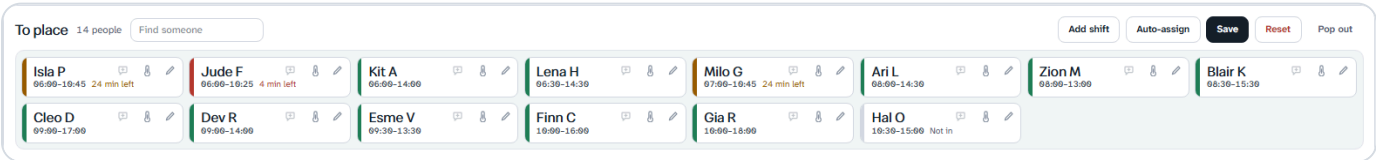
The floorplan: people still to place at the top, Leaders, the four shift targets, then the station groups in columns, with hourly sales and labour on the right.

Choosing the shift EVERYONE

Pick the **date** and the **shift**: Breakfast, Lunch, Dinner or Overnight. The From and To times fill in for the shift and decide which rota shifts appear. Change them if you need a different window. Overnight means the early hours of the next morning.

Each date and shift has its own saved floorplan, so you can plan tomorrow today.

People to place EVERYONE



The To place list, with search and the Add shift, Auto-assign, Save, Reset and Pop out buttons.

- It lists everyone rostered for this shift who isn't on the floorplan yet, **earliest start first**.
- Type in **Find someone** to search by name. Press **/** to jump straight to the box.
- **Pop out** turns the list into a window you can drag and resize, handy when the floorplan is long. **Dock** puts it back.

- When everyone is placed it says "Everyone on shift is on the floorplan".

Placing people EVERYONE

Drag and drop

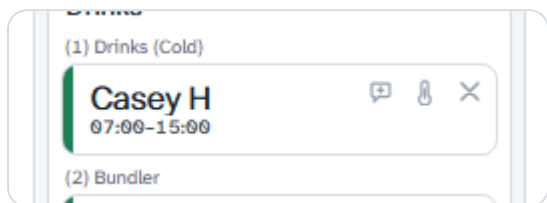
Drag a name from the list onto a position. Drag a name from one position to another to move them. Dropping onto someone who is already there swaps in the new person.

Click, then click

Easier on a tablet: click a name (it highlights and a bar says "Choose a slot for ..."), then click the empty position. Press Esc or **Cancel** to change your mind.

Taking someone off

Drag them back onto the list, or hover over their tile and press the **cross**.

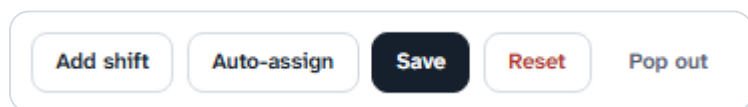


Hover over a name for its buttons: note, mark sick or absent, and take off.

Everything saves by itself.

There's no need to press Save, though pressing it confirms the floorplan is saved. Changes show on every screen using the same store, including the kitchen screen, within about a minute.

Auto-assign EVERYONE

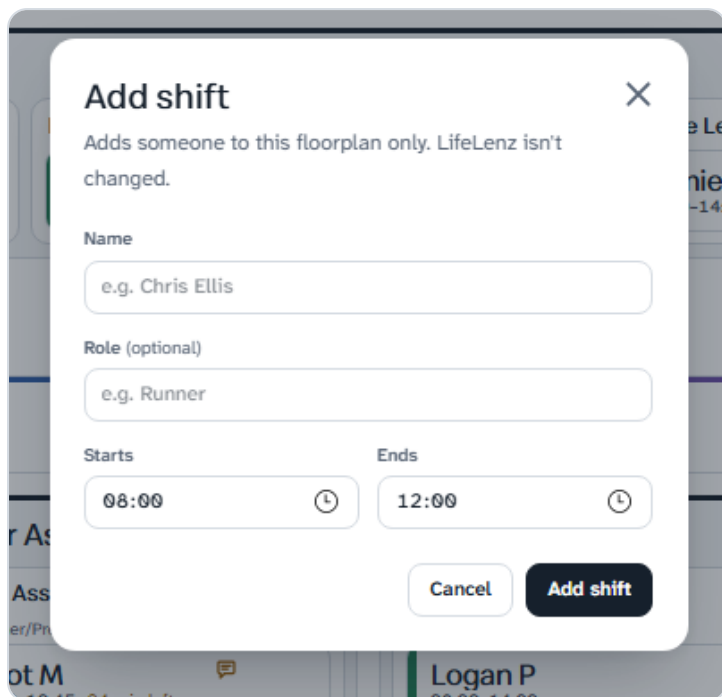


Add shift, Auto-assign, Save, Reset and Pop out.

Auto-assign places people using the position they have in LifeLenz for that shift, for example Service, Fries or Kitchen. Anyone you have already placed stays where they are, and anyone it can't place is left in the list for you.

- It asks you to confirm first.
- It can be used once for a shift while the page is open. To run it again, reset the floorplan first.
- Run it first, then drag people around to fit the shift.

Adding and editing shifts EVERYONE



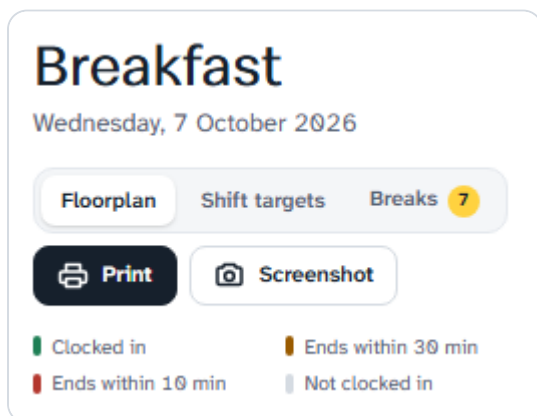
Add shift: name, role and times.

- **Add shift:** for someone who isn't on the rota (for example a borrowed crew member). Enter their name, role (optional) and times.
- The **pencil** on a name in the To place list edits their name, role and times, or removes the shift.
- **Reset** takes everyone off the floorplan for this shift and deletes the saved copy. It can't be undone, so it asks first.

These changes are for this floorplan only.

LifeLenz is not changed. Added and edited shifts are remembered on the computer or tablet you used, so other screens won't see them.

Colours and status EVERYONE



The colour key on the left of the floorplan, with the view buttons and Print and Screenshot.

The coloured edge of each name shows where they are in their shift:

- **Green:** clocked in.
- **Amber:** their shift ends within 30 minutes (it says how many minutes are left).
- **Red:** ends within 10 minutes.
- **Grey:** not clocked in (it says "Not in").

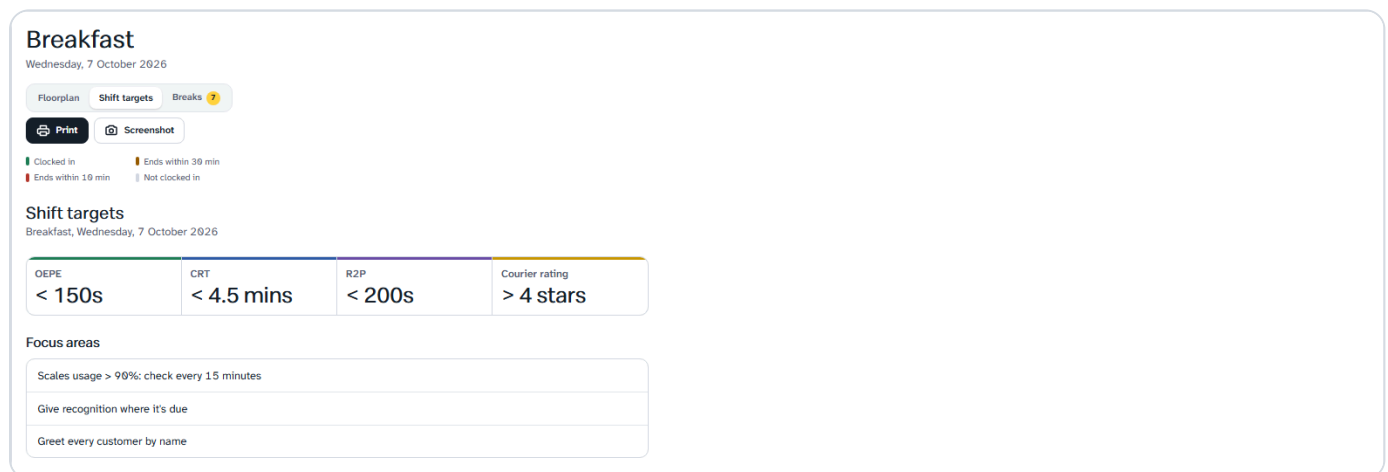
Beside the times you may also see **Break ✓** (a break has been taken) or **On break**. These come from LifeLenz clock-ins, so they appear once the break is recorded there.

Leaders, targets, sales and labour

- **Leaders** (Shift Manager, DT Leader and so on) always sit across the top.
- The four **shift targets** sit above the stations. Managers set them in Store settings.
- **Hourly Sales** shows projected and actual sales for each hour, and **Hourly Labour** shows scheduled and actual labour %, both live from LifeLenz. Actuals show green when on or better than plan and red when not. A store can choose to hide these.

Shift targets and Breaks EVERYONE

The buttons under the date switch between three views: **Floorplan**, **Shift targets** and **Breaks**.



The screenshot shows the 'Breakfast' section for Wednesday, 7 October 2026. At the top, there are tabs for 'Floorplan', 'Shift targets' (which is active), and 'Breaks'. Below the tabs are 'Print' and 'Screenshot' buttons. A legend indicates: Green for 'Clocked in', Amber for 'Ends within 30 min', Red for 'Ends within 10 min', and Grey for 'Not clocked in'. The 'Shift targets' section displays four targets in a row: OEPE (< 150s), CRT (< 4.5 mins), R2P (< 200s), and Courier rating (> 4 stars). Below this, the 'Focus areas' section lists three items: 'Scales usage > 90%: check every 15 minutes', 'Give recognition where it's due', and 'Greet every customer by name'.

The Shift targets view: the four targets, then the store's focus areas.

Shift targets shows the four targets large, with the store's **focus areas** underneath, for example "Scales usage over 90%".

Breakfast

Wednesday, 7 October 2026

Floorplan

Shift targets

Breaks ?

Print

Screenshot

Clocked in

Ends within 10 min

Ends within 30 min

Not clocked in

Due now 7

On break 1

Later 17

Taken 2

Name	Station	Shift	Break	
Emerson P	Booth 2	06:00-14:00	10:00	Due now
Tatum R	Sausage	06:00-14:00	10:00	Due now
Kit A	Not placed	06:00-14:00	10:00	Due now
Jamie C	Service Leader	06:30-14:30	10:30	Due now
Dana W	Hold Runner	06:30-14:30	10:30	Due now
Uma C	Sausage	06:30-14:30	10:30	Due now
Lena H	Not placed	06:30-14:30	10:30	Due now
Taylor R	Drinks	08:00-13:00	Since 10:05	On break
Casey H	Drinks	07:00-15:00	11:00	Later
Frankie D	Order Assembly	07:00-15:00	11:00	Later
Wren A	Eggs	07:00-15:00	11:00	Later
Morgan H	Drinks	08:00-14:30	11:30	Later
Indigo L	Order Assembly	08:00-14:30	11:30	Later
Ari L	Not placed	08:00-14:30	11:30	Later
Jordan E	Drinks	08:00-15:00	12:00	Later

The Breaks view: who needs a break, a suggested time, and a status.

Breaks lists everyone who needs one, in the order they matter, with a suggested time:

- Anyone working **more than 6 hours** needs a break of at least 20 minutes.
- Suggested times are around the middle of the shift, never in the first 2 hours or the last 90 minutes, and spread out so two people from the same station aren't off at once.
- Status: **Overdue**, **Due now** (from 10 minutes before), **On break**, **Later**, **Taken** or **Not needed**. The Breaks button shows a number when some are due.
- Under-18s need 30 minutes once they've worked more than 4½ hours. LifeLenz doesn't give ages here, so check those yourself.

Print and screenshot EVERYONE

- **Print** fits the whole floorplan on **one A4 landscape page**, however many stations there are. Choose A4 and landscape in the print window if it asks.
- **Screenshot** downloads the floorplan as a picture (PNG) you can save or send.

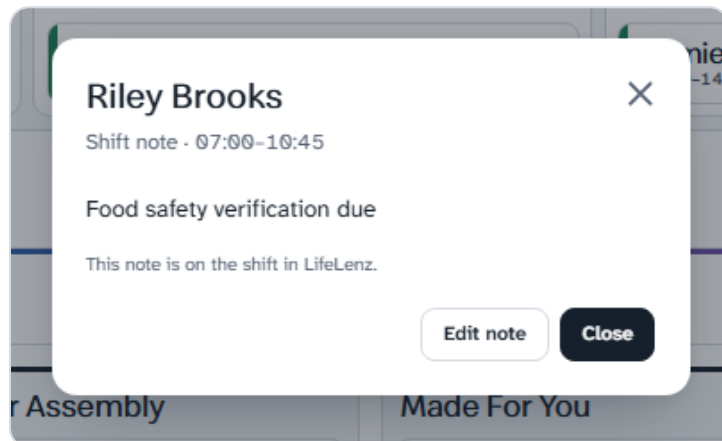
Keyboard shortcuts EVERYONE

- Ctrl + Z Undo the last change (on a Mac, ⌘ + Z).
- Ctrl + Y Redo.
- / Jump to the search box.
- Esc Cancel picking a person, or close a box.

Notes, sickness and absence

Shift notes EVERYONE

A note is a short message on a person's shift, such as "Manager meeting 2pm" or "Food safety verification due". Notes are saved in LifeLenz, so managers see them there too.



Reading a note. Edit note lets you change it.

- A small dark **MGR** badge after a name means that person is booked to the Shift Management position on that shift.
- A green **CT** badge after a name means that person is a **crew trainer**. It comes from the store's latest weekly training report (so it appears once a report has been uploaded), and it shows on the kitchen screen and prints.
- **Training marks:** under a name you may see a red **overdue** or amber **due** count of verifications. Hover over it to see which. On a narrow tile the tag shortens to a number, with a **!** after it when it's overdue (for example "2 !"). They come from the same report. They show only to someone who has entered the store's password (or is signed in as a manager), never on the kitchen screen, and they never print.
- **Hiding badges and marks:** two sliders sit under the colour key at the left of the floorplan. **Badges** switches the MGR and CT badges, and **Training info** switches the verification counts (it only appears when the store has a training report and you've entered the store's password). Your choice is remembered on that device. They aren't on the kitchen screen, which shows the badges but never the verification counts.
- A **speech bubble** on a name means the shift has a note. Click it to read it. The whole name tile is also **shaded yellow**, so a task to do stands out at a glance.
- To **add** a note, hover over a name and press the speech bubble with a plus. Type the note and press **Save note**.

The screenshot shows a modal dialog box titled 'Isla Penrose' with a close button (X) in the top right corner. Below the title, it says 'Shift note · 06:00–10:45'. The main heading is 'Note for this shift'. There is a large text input field with a placeholder text 'e.g. Manager meeting 2pm'. Below the input field, a note reads: 'This is saved on the shift in LifeLenz. It shows on that day's floorplan and in the store's daily notes email, so keep it professional.' At the bottom of the dialog are two buttons: 'Cancel' and 'Save note'.

Adding a note to a shift.

- **Edit note** replaces what was there. A note can't be removed from here; remove it in LifeLenz.
- Notes appear on **that day's floorplan**, in the **daily tasks email** and on its printable page, and as a * on a printed floorplan. Keep them professional.

Mark sick or absent EVERYONE

When someone calls in sick or doesn't turn up, use the **thermometer** button on their name (in the list, or when you hover over them on the floorplan).

Mark Isla P as sick ✕

06:00–10:45 shift

What are you recording?

Mark sick ▼

They'll be taken off this floorplan.

☒ **Change this shift to Sickness time off in LifeLenz**
It stays on the rota with the same times. This can affect their pay, so check it in LifeLenz if you're unsure. Untick it to leave the shift as it is.

☒ **Add a note to their next shift in LifeLenz**
Fri 9 Oct, 08:00–13:30

Note

Return to work meeting

The note shows on that day's floorplan and in the store's daily notes email, so keep it neutral.

Cancel Mark sick

Mark sick: choose what to record, and what should change in LifeLenz.

1. Choose **Mark sick** or **Mark unauthorised absence** from the box at the top.
2. Choose what should change in LifeLenz:
 - **Change this shift** to Sickness time off or Unauthorised absence. This can affect pay, so check it in LifeLenz if you're unsure.
 - **Add a note to their next shift:** it shows their next shift's date, and a note you can edit ("Return to work meeting" for sickness, or "Investigate absence and invite to a meeting if required").
3. Press the button. A full-screen **Are you sure?** page shows exactly what will happen.
4. Press **Yes** to go ahead, or **No, go back**.

Are you sure you want to mark Isla P as sick?

06:00-10:45 shift

They'll be taken off this floorplan.

Their shift will be changed to **Sickness time off** in LifeLenz.

The note **"Return to work meeting"** will be added to their next shift (Fri 9 Oct, 08:00-13:30) in LifeLenz.

Changes in LifeLenz can only be undone there.

No, go back

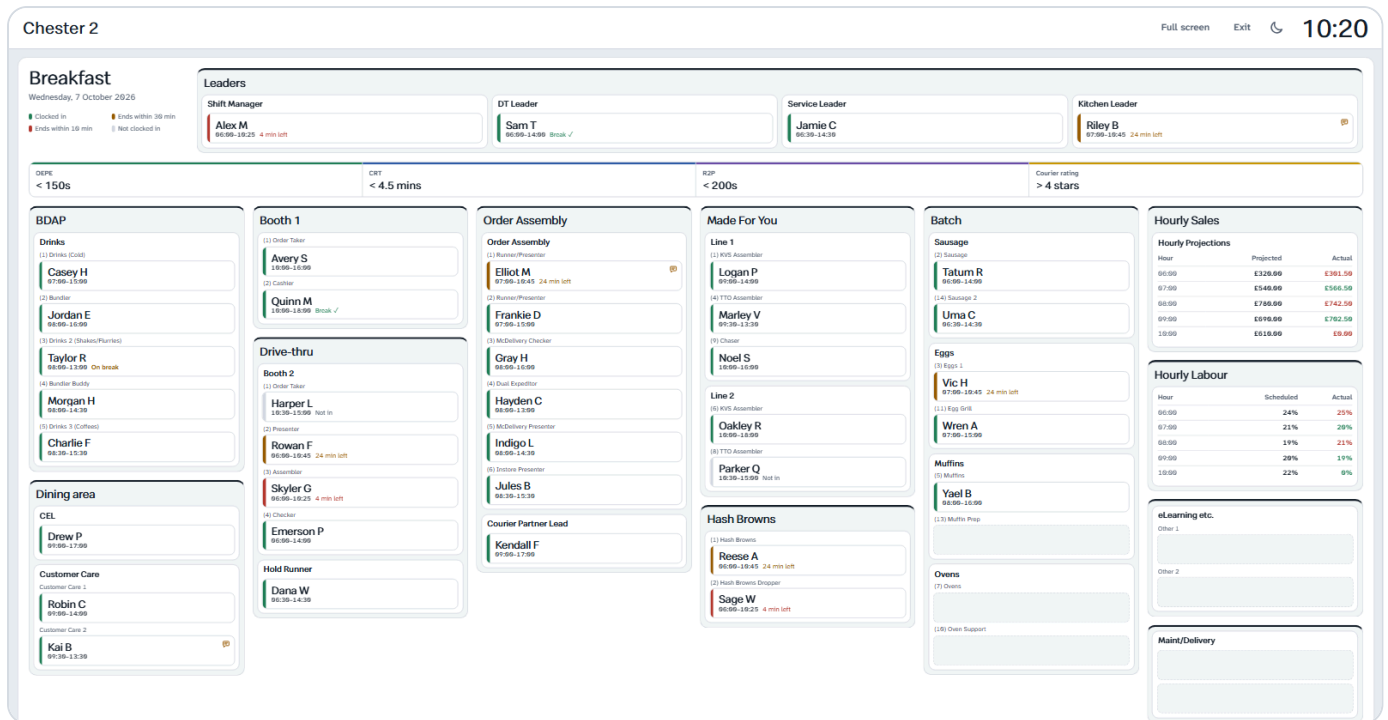
Yes, mark as sick

The Are you sure? page, which takes over the screen so it can't be pressed by accident.

- The person is taken off the floorplan for that shift.
- If something fails, you're told why and nothing is half-done without saying so.
- Changes made in LifeLenz can only be undone in LifeLenz.
- The note on the next shift shows to everyone using the floorplan, so keep the wording neutral.
- Managers or admins can **switch this off for a store** (see Store settings). The buttons then disappear.

The kitchen screen EVERYONE

The kitchen screen is the floorplan for a TV or wall tablet. Open it from **Kitchen screen** in the top bar.



The kitchen screen: the plan, a clock and the breaks along the bottom.

- It is **read-only**, so nobody can move people by accident. Changes made on another screen appear within a minute.
- It **follows the day by itself**: Breakfast until 11:00, Lunch until 16:00, Dinner after that, and Overnight in the early hours.
- It shows the **time**, shrinks to **fit the screen** without scrolling, keeps the display **awake**, and shows the next **breaks** along the bottom.
- Use **Full screen** to fill the display and **Exit** to go back. The buttons and mouse pointer hide after a few seconds and come back when you move the mouse.
- It uses the same store password as the floorplan.

Training EVERYONE

The Training pages turn the weekly **MyTraining report** into something you can act on: who has a verification overdue or coming up, how each crew trainer is doing, and where the biggest gaps are. Open them from **Training** in the main site menu (the home page and the admin pages), and enter your store's password. Once you're in, **Take the tour** (top right) walks you through the page. **Collapse a section** by clicking its heading (click again to open it), or use **Collapse all / Expand all** at the top right. Your choice is remembered on that device, and printing always shows every section.

These pages show crew by first name and the initial of their surname

(for example *Alex M*). Even so, only open them on a screen that isn't on show to the crew, and don't share the password outside the store.

101

Riverside

Store password needed

Open it to enter the password.

102

Highfield

Store password needed

Open it to enter the password.

103

Marketgate

Store password needed

Open it to enter the password.

The Training page lists the stores. Opening one asks for its store password.

Riverside

Enter the store password to open this store's training.

Store password

Open training

The same password as the floorplan. All stores · Manager sign in

The store password page for Training.

The weekly report

Weekly report

Latest report is dated **6 Oct 2026** (3 days ago, so the days left below are counted from today). 3 reports kept, which builds the week-by-week history below.

Upload the report (PDF)

Choose File

No file chosen

Upload

Emailing the report in isn't switched on yet. An admin sets the mailbox up in admin.env. Sending the same week's report again replaces it.

► Recent activity

Verifications due or overdue

Anything overdue, or due within 30 days. "Plan notes" finds each person's next shift and shows the note it would add, so the daily and weekly tasks emails carry it.

29

people with something overdue

49

people with something due in 30 days

96

verifications in total

Show what's due within

30

days

Update

Plan notes for next shifts

Person

Due

Notes

The top of a store's Training page: the report, and verifications due or overdue.

- Each week, send the **MyTraining Reports - Restaurant** PDF in. Either press **Upload** on the Training page, or email it to the training mailbox (if your admin has set it up).
- Every week's report is kept, so you can see how things change. Sending the same week again just replaces it.
- A report for a different store is refused.

Verifications due or overdue

- The list shows anyone with a verification **overdue** (red) or **due within 30 days** (you can change the 30). The days are counted from today, not from the report's date.
- The seven SRIW items expire together, so they are shown as one.
- The top boxes count the people and verifications involved.

Plan notes for next shifts

The note goes on each person's **next shift**. If that shift already has a note, ours is added after it (and a renewals note from an earlier week is replaced). Untick anyone you don't want to add a note for.

	Person	Next shift	Note that will be on the shift
☒	Alex M	Sat 10 Oct, 08:00–14:00	Verification renewals: Food Safety (overdue 43d), Milkshake & Soft Serve (overdue 7d)
☒	Blair K	Sat 10 Oct, 08:00–14:00	Verification renewals: Safety & Security (overdue 43d), Stock Delivery (overdue 7d), Allergen Awareness (due today), Milkshake & Soft Serve (18d)
☒	Casey H	Sat 10 Oct, 15:00–21:00	Verification renewals: Digital Food Safety (overdue 43d), SRIW (overdue 12d), Stock Delivery (overdue 7d), Safety & Security (due today)
☒	Dana W	Mon 12 Oct, 11:00–17:00	Verification renewals: Stock Delivery (overdue 43d), SRIW (24d), Allergen Awareness (30d)
☒	Drew P	Sun 11 Oct, 15:00–21:00	Verification renewals: Milkshake & Soft Serve (overdue 43d)
☒	Hayden C	Mon 12 Oct, 10:00–16:00	Verification renewals: Allergen Awareness (overdue 43d), Stock Delivery (overdue 43d), SLV (24d), Safety & Security (30d)
☒	Jude F	Sat 10 Oct, 11:00–17:00	Verification renewals: SRIW (overdue 43d), Digital Food Safety (overdue 18d), Filtering Fryers (overdue 7d)
☒	Logan P	Mon 12 Oct, 09:00–15:00	Verification renewals: Food Safety (overdue 43d)
☒	Marley V	Tue 13 Oct, 10:00–16:00	Verification renewals: Filtering Fryers (overdue 43d)

The plan: each person's next shift and the exact note that will be added.

1. Press **Plan notes for next shifts**. It finds each person's next shift in the coming 14 days.
2. Check the list. For each person you see their next shift and the note that will go on it. Untick anyone you don't want.
3. Press **Add the ticked notes to LifeLenz** and confirm.
 - Notes look like *Verification renewals: Food Safety (overdue 4d), Allergen Awareness (12d)*.
 - If the shift already has a note, ours is **added after it**. A renewals note from an earlier week is replaced, so a shift never has two.
 - Anyone who can't be placed is listed with the reason: *Not matched* (their name wasn't found in LifeLenz, or two people share it), *No shift* in the next 14 days, or the note would be too long.

- New starters' e-learning **EVERYONE**

Each new starter and the four courses they have to do.

- **SRI e-learning** (the SRIW modules) and **Workplace violence prevention** are done on the person's **first shift**. While either is outstanding, it goes on their next shift.
- **Creating Belonging** and **Allergen Awareness** are done from **day 14** after the start date and **no later than day 30**. Until day 14 the table says *From* that date. Then it says *Due by* the day-30 date, and *Overdue* once that has passed.

Plan notes for next shifts finds each new starter's next shift and shows the note it would add. Creating Belonging and Allergen Awareness only go on a shift that falls on or after day 14, so if their next shift is on day 12, the later shifts that week are checked and the note goes on the first one on or after day 14 (the first-shift courses still go on their next shift).

The note goes on each person's **next shift**. If that shift already has a note, ours is added after it (and a new-starter note from an earlier week is replaced). Creating Belonging and Allergen Awareness only go on a shift that falls on or after day 14. Untick anyone you don't want to add a note for.

Person	Next shift	Note that will be on the shift
☒ Hal O	Tue 13 Oct, 09:00–15:00	New starter e-learning: Do on this shift: SRI e-learning, Workplace violence prevention.
☒ Isla P	Wed 14 Oct, 10:00–16:00	New starter e-learning: Do on this shift: Workplace violence prevention. Due by 30 Oct: Creating Belonging, Allergen Awareness.
☒ Jude F	Sun 11 Oct, 11:00–17:00	New starter e-learning: Due by 23 Oct: Creating Belonging.
☒ Kit A	Mon 12 Oct, 15:00–21:00	New starter e-learning: Due by 14 Oct: Creating Belonging, Allergen Awareness.

4 ready to add.

The plan for new starters: each next shift and the exact note that will be added.

- Notes look like *New starter e-learning: Do on this shift: SRI e-learning, Workplace violence prevention. Due by 24 Oct: Creating Belonging, Allergen Awareness.*
- It works the same way as the renewals notes: added after the shift's own note, an earlier new-starter note is replaced, and other notes (renewals, on-boarding, HIG chats) are kept. If someone's name doesn't match LifeLenz, match it by hand as above.
- The report calls the allergen course *Allergen Awareness*. If a report was filed before ShiftTools read the course grids, the section asks you to upload it again.
- With **Add the notes automatically** switched on (admins), these notes are added too when a new report arrives.

Crew trainers

Crew trainers

Verifications each Crew Trainer completed, week by week (from each report's "Crew Trainer Verification Completions"). A trainer who isn't in a week's report did none that week.

Crew Trainer	22 Sep	29 Sep	6 Oct	Total	Weeks active
Alex M	12	14	16	42	3 / 3
Sam T	9	9	9	27	3 / 3
Jamie C	7	7	7	21	3 / 3
Riley B	5	6	7	18	3 / 3
Casey H	3	3	3	9	3 / 3
Jordan E	2	2	2	6	3 / 3
Morgan H	0	0	0	0	0 / 3
Taylor R	0	0	0	0	0 / 3

[Download as a spreadsheet \(CSV\)](#) Every week kept, for performance reviews.

Verifications each crew trainer completed, week by week.

This shows how many verifications each Crew Trainer completed in each weekly report, with totals and how many weeks they were active. A trainer who isn't in a week's report did none that week, which shows as 0. **Download as a spreadsheet** gives every week kept, for performance reviews.

Opportunities

Opportunities

The share of the crew trained on each verification, lowest first, so the biggest gaps are at the top (report of 6 Oct 2026). The arrow shows the change since the report before.

Verification	Area	Trained	Change
FC Assemble & Present Verification	Service	26.0%	▲ 2.5
Dining Area & Kiosk Verification	Service	28.0%	▲ 2.5
Tempering & Prep Verification	Food & Drink	33.0%	▲ 2.5
DT Order Taking & Pay Verification	Service	34.0%	▲ 2.5
SRIW for Managers	Culture & Digital	37.0%	▲ 2.5
Hospitality Verification	Foundation	39.0%	▲ 2.5
McCafe Verification	Food & Drink	39.0%	▲ 2.5
Beverages & Dessert Verification	Food & Drink	45.0%	▲ 2.5

Training coverage by verification, lowest first, with the change since the last report.

The share of the crew trained on each verification, **lowest first**, so the biggest gaps are at the top. The arrow shows the change since the report before. A low bar is a verification worth putting people

forward for.

Automatic notes ADMINS

An admin can switch on **Add the notes automatically when a new report arrives** for a store. Use the manual plan for a few weeks first, so you can see what it does.

People EVERYONE

The People pages turn the weekly **Hiring & Turnover report** into something you can act on: how turnover is moving, who is still on-boarding, where recruitment has got to, and who has left. They work like the Training pages: open **People** in the main site menu, choose your store and enter its password. **Take the tour** (top right) walks you through the page. Like the Training page, each section can be **collapsed** by clicking its heading, or all at once with **Collapse all / Expand all**, and your choice is remembered.

These pages show crew by first name and the initial of their surname, but they still say things about individuals. Keep the store password to your team, and don't leave them on show.

101 Riverside Store password needed Open it to enter the password.	102 Highfield Store password needed Open it to enter the password.	103 Marketgate Store password needed Open it to enter the password.	
--	--	---	--

The People page lists the stores. Opening one asks for its store password.

The weekly report

- Each week, send the **Hiring & Turnover** PDF in. Press **Upload** on the People page, or email it to the same mailbox as the training report. The report says what kind it is, so it doesn't matter which page or mailbox you use.
- Every week is kept, which builds the history. Sending the same week again replaces it. A report for a different store is refused.

At a glance

At a glance

The arrows show the change since the report before.

46.73% turnover, last 12 months ▲ 0.93	34.34% turnover, year to date ▲ 1.14	9.52% 90-day turnover, last 12 months	111 employees (89 working) ▲ 1	0 / 0 starters / leavers last week	0 people needed in the next six weeks
---	---	---	---	--	---

This year so far: 37 starters and 43 leavers. Last 12 months: 63 starters and 61 leavers.

Turnover, staff and hiring need, with the change since the last report.

The tiles show **turnover** over the last 12 months, this year so far and the last 90 days, how many people you employ (and how many are working), last week's starters and leavers, and how many people the report says you need to hire in the next six weeks. An arrow shows the change since the report before. Turnover going up shows in **red**, because it means more people are leaving.

Week by week

Week by week

One row for each report kept, newest first.

Week ending	Turnover, 12 months	Year to date	90-day	Employees	Working	Starters	Leavers	Hiring need
9 Oct 2026	46.73% ▲ 0.93	34.34%	9.52%	111 ▲ 1	89	0	0	0
2 Oct 2026	45.8% ▲ 0.9	33.2%	9.52%	110 ▲ 2	87	0	0	0
25 Sep 2026	44.9%	32.1%	9.52%	108	85	0	0	0

Starters and leavers are for the week of each report. Turnover rising (▲) shows in red, because it means more people are leaving.

One row for each report kept, newest first.

One row for each report, so you can follow the trend. It starts with a single row and fills in as each week's report arrives. Below it, **By occupation group** breaks the staff and turnover down for crew members, crew trainers, the dining area and the rest, with the report's own forecast of leavers.

New starters and on-boarding

New starters

Everyone who started in the last six months, and what's still to finish. "Plan notes" puts a note such as *Onboarding to finish: NI number* on each person's next shift, so it shows on the floorplan and in the daily and weekly tasks emails.

16

starters in the last six months

2

with something to finish

Plan notes for next shifts

Person	Started	Service	ETW	Online orientation	Bank details	NI number	CDP	Probation review	Notes
Casey A	6 May 2026	5 months	✓	✓	✓	✓	100%	✓	–
Jamie C	6 May 2026	5 months	✓	✓	✓	Outstanding	100%	✓	–
Jordan M	15 Jul 2026	2 months	✓	✓	✓	✓	100%	Due in 6d	–
Taylor R	27 Jul 2026	2 months	✓	✓	✓	✓	100%	By 27 Oct 2026	–
Morgan C	6 Aug 2026	2 months	✓	✓	✓	✓	100%	By 6 Nov 2026	–
Charlie P	6 Aug 2026	2 months	✓	✓	✓	✓	100%	By 6 Nov 2026	–

Everyone who started in the last six months, and what is still to finish.

Everyone who started in the last six months, with a tick for each thing that's done and **Outstanding** for each that isn't: **ETW**, online orientation, bank details, NI number and **CDP** (the names are as in the

report), plus the **probation review**, which shows the date it's due. Anyone with something to finish, or a review due soon, is shaded.

1. Press **Plan notes for next shifts**. It finds each of those people's next shift in the coming 14 days.
2. Check the list. For each person you see their next shift and the note that will go on it, such as *Onboarding to finish: NI number*. Untick anyone you don't want.
3. Press **Add the ticked notes to LifeLenz** and confirm.

The note goes on each person's **next shift**, so their manager sees it on the floorplan and in the tasks emails. If that shift already has a note, ours is added after it (and an on-boarding note from an earlier week is replaced). Untick anyone you don't want to add a note for.

Person	Next shift	Note that will be on the shift
Jordan M	Not matched not found in LifeLenz Choose their LifeLenz name ▼ Match	Onboarding to finish: probation review (due in 6d)
☒ Jamie C	Mon 12 Oct, 10:00–16:00	Onboarding to finish: NI number

Add the ticked notes to LifeLenz

Back

1 ready to add.

The plan: each starter's next shift and the exact note that will be added.

- If the shift already has a note, ours is **added after it**. An on-boarding note from an earlier week is replaced, so a shift never has two.
- Anyone who can't be placed is listed with the reason, in the same way as on the Training page. If someone shows as *Not matched* because LifeLenz uses a different name (a preferred name, say), choose their LifeLenz name from the list beside them and press **Match**. It's remembered for the store, used for the Training notes too, and their LifeLenz name is then shown wherever they appear on these pages.
- The notes show on the floorplan (a yellow tile) and in the daily and weekly tasks emails.
- **Probation review**. A probation review is due **within the first three months** of employment, so its due date is three months after the start date. The table shows that date for everyone whose review the report doesn't show as done: grey while it's a way off, **amber** once it's due soon, and **red** once it's overdue. From 14 days before the due date it goes into the person's note, as *Onboarding to finish: probation review (due in 6d)*, and carries on, as *(overdue 5d)*, until the report shows the review as done. Under the table you can change how many days ahead it starts, or untick the box to leave probation reviews out of the notes.
- An admin can switch on **Add the notes automatically when a new report arrives**. Use the manual plan for a few weeks first, so you can see what it does.

HIG chats

HIG chats

New hires have a HIG chat **2, 4, 6, 8, 12 and 24 weeks** after their start date. Weeks 6 and 8 aren't needed for adults. The report doesn't say who is an adult or whether a chat has been had, so tick **Adult** for anyone aged 18 or over (until you do, they're shown all six chats) and press **Done** when a chat has been had.

11

chats overdue

3

due in the next 7 days

11

starters with a chat to do

Plan HIG chat notes for next shifts

Person	Started	Adult	Week 2	Week 4	Week 6	Week 8	Week 12	Week 24	Note
Morgan H	24 Sep 2026	☐ 18+	Overdue 1d Done	22 Oct 2026 Done	5 Nov 2026 Done	19 Nov 2026 Done	17 Dec 2026 Done	11 Mar 2027 Done	–
Taylor R	24 Sep 2026	☒ 18+	Overdue 1d Done	22 Oct 2026 Done	Not needed	Not needed	17 Dec 2026 Done	11 Mar 2027 Done	–
Rowan F	24 Sep 2026	☒ 18+	Overdue 1d Done	22 Oct 2026 Done	Not needed	Not needed	17 Dec 2026 Done	11 Mar 2027 Done	–

Each new starter's six HIG chats: done, due soon, overdue, or not needed.

New hires have a HIG chat **2, 4, 6, 8, 12 and 24 weeks** after their start date. Weeks 6 and 8 aren't needed for adult workers. Each starter has a row, with the date of each chat (their start date plus whole weeks).

- The report doesn't say who is an adult, or whether a chat has been had, so you tell ShiftTools. Tick **18+** for anyone who is an adult, which takes weeks 6 and 8 off their list. **Until you do, everyone is shown all six chats**, because missing one for a young worker is the worse mistake.
 - Press **Done** when a chat has been had. It's recorded with that day's date. **Undo** takes it back if you pressed it by mistake.
 - **Red** means overdue, **amber** means due within the next few days (seven to start with), and grey is later. The three boxes at the top count them.
1. Press **Plan HIG chat notes for next shifts**. It finds each starter's next shift in the coming 14 days.
 2. Check the list. Each person gets a note such as *HIG chat due: week 4 (overdue 3d)*. **A chat can't be had before the day it falls due, so the note only goes on a shift on or after that day.** If their first shift of the week is too early, ShiftTools looks at their **later shifts that week** (Monday to Sunday) and puts the note on the first one on or after the due day. The plan shows which shift it chose. Only if none of that week's shifts is late enough do they show as *Not due yet* and get nothing this time; the next week's plan picks them up. The days in the note are counted from that shift (*today* on the day it is due). Untick anyone you don't want.
 3. Press **Add the ticked notes to LifeLenz** and confirm.

The note goes on each person's **next shift**, so their manager sees it on the floorplan and in the tasks emails. If that shift already has a note, ours is added after it (and a HIG chat note from an earlier week is replaced). Untick anyone you don't want to add a note for.

Person	Next shift	Note that will be on the shift
☒ Morgan H	Tue 13 Oct, 10:00–16:00	HIG chat due: week 2 (overdue 1d)
☒ Taylor R	Mon 12 Oct, 09:00–15:00	HIG chat due: week 2 (overdue 1d)
Rowan F	– Not matched not found in LifeLenz Choose their LifeLenz name Match	HIG chat due: week 2 (overdue 1d)
☒ Jordan E	Sun 11 Oct, 08:00–14:00	HIG chat due: week 2 (overdue 1d) Shift already says: Manager meeting 2pm
Quinn C	– Not matched not found in LifeLenz Choose their LifeLenz name Match	HIG chat due: week 2 (overdue 9d), week 4 (in 5d)
Harper T	– Not matched not found in LifeLenz Choose their LifeLenz name Match	HIG chat due: week 2 (overdue 9d), week 4 (in 5d)

The plan: each starter's next shift and the HIG chat note that will be added.

- The note goes on the next shift, so it shows on the floorplan (a yellow tile) and in the daily and weekly tasks emails. If the shift already has a note, including an on-boarding note, ours is **added after it**. A HIG chat note from an earlier day is replaced, so a shift never has two.
- You can change how many days before a chat is due that the note starts to appear (**Put a note on the next shift from ... days before a chat is due**).
- **Setting this up for the first time?** Open **Setting this up? Mark earlier chats as had** below the table, choose a date, and every chat that fell due before it is marked as had. Anything you didn't have stays overdue until you press Done, and each one can be undone.
- An admin's **Add the notes automatically when a new report arrives** adds the HIG chat notes as well as the on-boarding ones.

Recruitment

Recruitment

Where candidates are in the McHire process, and how many applications, interviews and hires there have been each month.

23

candidates in the process

0

open jobs

The process

Stage	Candidates	Average days at this stage
Capture	0	0.4
Followup Conversation	0	1.5
Assessment	0	31.7
In Review	0	9.5
Send Full Application	1	18.7
Interview Scheduling	21	18.8
Interviews Completed	0	0

Month by month

Month	Applications	Interviews	Hires	Non-starters
Oct 2026	0	0	0	0
Sep 2026	26	17	6	0
Aug 2026	21	7	8	0
Jul 2026	44	15	2	0
Jun 2026	0	0	0	0
May 2026	0	0	0	0
Apr 2026	9	7	2	1

The McHire process and the months of applications, interviews and hires.

How many candidates are at each stage of the McHire process and for how many days on average (stages with someone in them are shaded), and the applications, interviews and hires for each month, with the most recent month first.

Leavers, transfers and job changes

Leavers

Everyone who left in the last 12 months: how long they stayed, and the leave codes used. The report gives a code, not the reason in words.

62

left in the last 12 months

13

left within 90 days (21%)

How long they stayed

Within 90 days		13
3 to 12 months		18
1 to 2 years		11
Over 2 years		20

Leave codes

Code 4 · 35

Code 1 · 9

Code 31 · 5

Code 24 · 4

Code 2 · 3

Code 11 · 2

Code 7 · 2

Code 25 · 1

Code 27 · 1

Most recent leavers

Person	Left	Service	Code
Skyler F	26 Sep 2026	22 months	4
Emerson C	25 Sep 2026	7 months	7
Dana R	20 Sep 2026	17 days	4
Elliot A	19 Sep 2026	11 months	4
Frankie V	13 Sep 2026	14 months	4
Gray M	7 Sep 2026	9 months	4
Hayden H	3 Sep 2026	2 yrs+	4

How long leavers stayed, the leave codes used, and the most recent leavers.

ShiftTools user guide

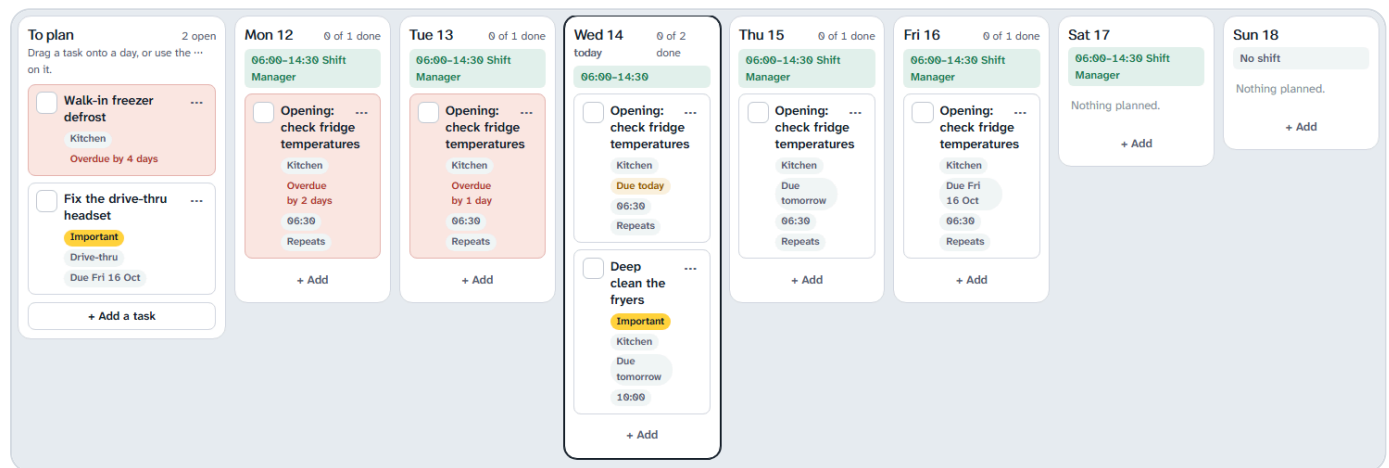
Page 28 of 41

Everyone who left in the last 12 months: **how long they stayed**, how many left **within 90 days** of starting, the **leave codes** used (the report gives a code, not the reason in words), and the most recent leavers. Anyone who left within 90 days is shaded. Below that are the people who **transferred** in or out of the store and who **changed job**, over the last year.

Tasks MANAGERS

A to-do list for your store's managers. Give out tasks, hand them over, plan each manager's days around their shifts, and follow up on what is done. You sign in with a manager account to use it, but the managers who are given tasks don't need accounts: you pick them from LifeLenz. Find it under **Tasks** on your store's bar. Press **Take the tour** on the page for a one-minute walk through.

My week



One manager's week: To plan on the left, then a column for each day with that manager's LifeLenz shift at the top.

- Pick any manager at the top right to see their week. Use the arrows to move between weeks.
- **To plan** holds open tasks that haven't been given a day. Tasks handed to you land here. Overdue ones are red and come first.
- **Drag a task onto a day** to plan it, and drag it back to unplan it. On a phone, use the ... on the task and choose a day (and a time if you like).
- The green line at the top of each day is that manager's **shift from LifeLenz**, so you can see how much time they really have. It arrives a moment after the page opens. If LifeLenz is slow, your tasks are still there and a note offers to try again.
- **Tick the box** when a task is done. **Click the title** to edit it. **+ Add** on a day adds a task straight to that day.

Edit task

Close

What needs doing?

Walk-in freezer defrost

Details (optional)

Department

Kitchen (lead: Alex Morgan)

Give it to

Alex Morgan

Due by (optional)

10/10/2026

Plan it for (optional)

dd/mm/yyyy

At (optional)

--:--

☐ Important

Delete

Cancel

Save task

Making or editing a task.

When you make a task, choose a **department** and, unless you name someone, it goes to that department's **lead**. You can also give it a due date, plan it for a day and time, and mark it Important.

Handing a task to someone else

Open the **⋮** on a task and choose **Hand over to**. It leaves your week and lands in theirs, saying who handed it over. They plan it for their own day, so the day you had planned is cleared. A department lead can use this to give the department's tasks to the right person on shift.

Team

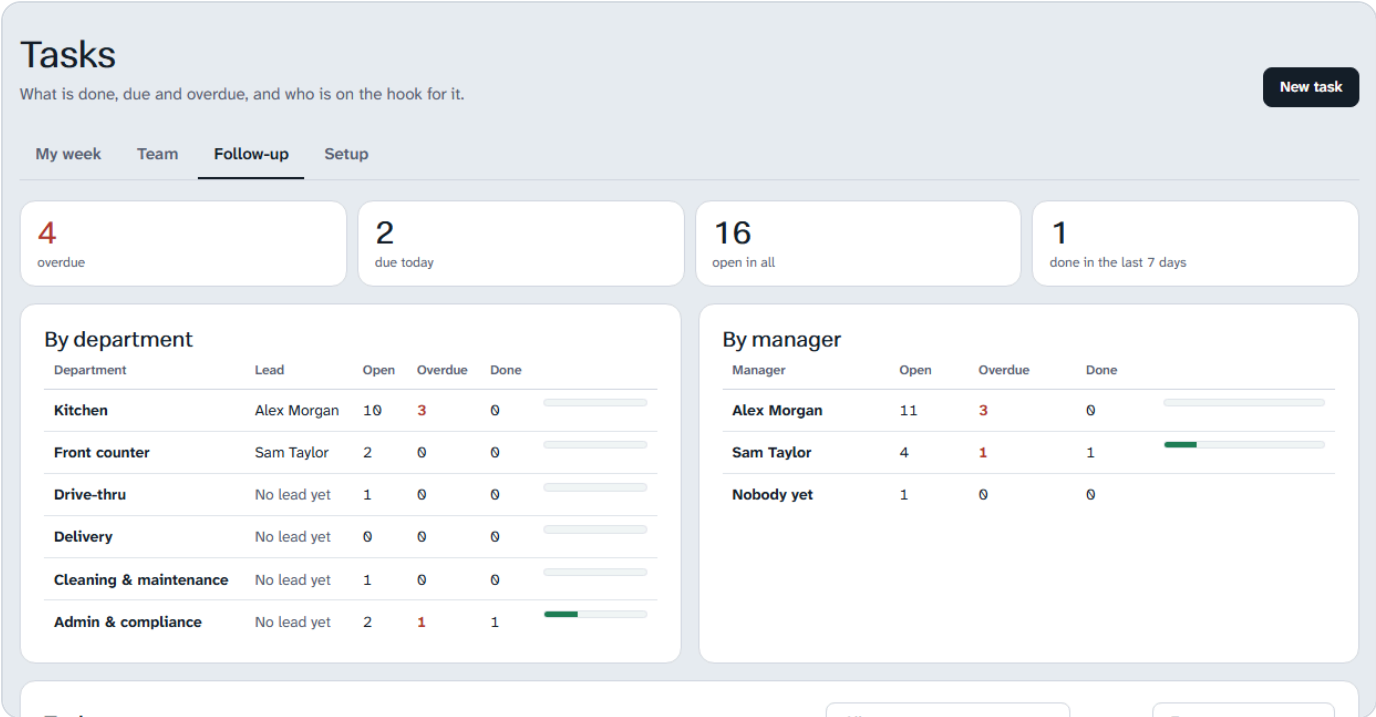
Manager	Mon 12	Tue 13	Wed 14	1
Alex Morgan (you) Lead: Kitchen	06:09–14:30 Shift Manager 1 task	06:09–14:30 Shift Manager 1 task	06:09–14:30 2 tasks	:
Sam Taylor Lead: Front counter	14:09–22:30 1 task (1 done)	14:09–22:30 1 task	06:09–14:09 1 task	-
Nobody yet Tasks waiting to be given to someone	-	-	-	:
Shifts come from LifeLenz. A manager shows "Not linked to LifeLenz" until you link them in Setup . Open on the right counts every task.				

Manager	Mon 12	Tue 13	Wed 14	1
Alex Morgan (you) Lead: Kitchen	06:09–14:30 Shift Manager 1 task	06:09–14:30 Shift Manager 1 task	06:09–14:30 2 tasks	:
Sam Taylor Lead: Front counter	14:09–22:30 1 task (1 done)	14:09–22:30 1 task	06:09–14:09 1 task	-
Nobody yet Tasks waiting to be given to someone	-	-	-	:
Shifts come from LifeLenz. A manager shows "Not linked to LifeLenz" until you link them in Setup . Open on the right counts every task.				

Everyone's week at a glance.

A row for each manager with their shift each day and how many tasks they have on it, and how many they still have open. Press a manager's name to open their week. The bottom row counts tasks that haven't been given to anyone yet.

Follow-up



Follow-up: what is overdue, due today and done, by department and by manager.

The numbers at the top show what is overdue, due today, open in all, and done in the last 7 days. **By department** shows each department's lead, how many tasks are open and overdue and how many are done, with a bar. **By manager** does the same for each person. Press a department or a name to see just their tasks. Below, the tasks are grouped as Overdue, Due today, Coming up, No date and Done in the last 7 days, and you can tick, plan or hand over from there.

Setup

Departments and their leads

A department lead is the manager who owns that area. A task given to a department, with nobody named, goes to its lead, who can then hand it over to another manager. Tick one or more leads for each department.

Kitchen

SaveDelete

☒ Alex Morgan☐ Sam Taylor

Front counter

SaveDelete

☐ Alex Morgan☒ Sam Taylor

Drive-thru

SaveDelete

☐ Alex Morgan☐ Sam Taylor

Delivery

SaveDelete

☐ Alex Morgan☐ Sam Taylor

Cleaning & maintenance

SaveDelete

☐ Alex Morgan☐ Sam Taylor

Setup: departments and their leads.

1. **Departments and leads.** A store starts with Kitchen, Front counter, Drive-thru, Delivery, Cleaning & maintenance and Admin & compliance. Rename them, add your own, and tick one or more managers as each department's lead. A department's lead is who gets its tasks and is accountable for them on the Follow-up page.
2. **Repeating tasks.** For jobs that come round every week, such as the opening checks: choose the days, the department and a time. A copy appears on each of those days, already planned for that day, in the manager's week. You can pause or stop a repeating task. Stopping removes the copies from today on that are still open and keeps everything already done.
3. **Managers.** Pick each manager from your LifeLenz staff list and press Add. They don't need a ShiftTools account. That is how their shifts appear on their week. Do this first, as departments, tasks and the Team view all use this list.

Tasks are kept for each store separately, and only managers of that store (and admins) can see or change them.

Finance MANAGERS

Two tools that replace the workbooks: the **daily sales and labour tracker** and the **P&L log**. Find them under **Finance** on your store's bar. Each store's figures are kept separately, and only managers of that store (and admins) can see or change them. Press **Take the tour** on either page for a one-minute walk through.

Sales & labour

- The page shows one month with a row for every day. Fill in **last year's sales**, the **projected sales** and **scheduled labour £** ahead of time, then the **actual sales** and **actual labour £** each day. The percentages, and how you did against projection and last year, work themselves out as you type.
- **Transfers in** is labour £ for crew from another store who worked in yours, and **Transfers out** is labour £ for your crew who worked in another store. **Actual labour %** counts your actual labour plus transfers in, less transfers out, so it reflects what was really spent on your sales.
- For a quick end-of-day entry use **Enter a day** at the top. It starts on yesterday. For catching up or planning ahead, type straight into the grid and press **Save**. A blank box clears that figure. You can type £ signs and commas.
- The boxes at the top show the **month so far**: only days with actual sales count, so labour % and sales against projection are fair however far through the month you are.
- **Download Excel** saves the month as a workbook. At the bottom of the page you can choose the organisation's **Sales Tracker workbook** and the month it is for, and read it in so you don't type it twice. It reads this store's figures and replaces those for the days it contains.

All stores

Supervisors and anyone who looks after more than one store get an **All stores** tab. It shows each store's month so far side by side with a total, flags stores whose **yesterday's figures aren't in**, shows **any one**

day for every store, and a **day-by-day grid** of any measure (such as actual labour %).

P&L log

- One row for each account: Food, Paper, Operating supplies, Promotion, Outside services, Travel, Linen, M&R Building, M&R Equipment, M&R IT, HVAC, Miscellaneous, Office and Utilities. Open one to add its **invoices**, **accruals** (charges awaiting an invoice), **monthly prepayments**, **other charges** (a credit is a minus amount) and **transfers**. Press **Edit** on a line to change or delete it.
- The charge is worked out as in the workbook: invoices, prepayments, other charges and this month's accruals, plus transfers in, less transfers out, less **last month's accruals**, which come forward by themselves so nothing is counted twice.
- **Food** and **Paper** are costed from stock: opening stock (last month's closing, filled in for you) plus the charge, less closing stock from the Ops report. Their percentage is of the month's actual sales.
- Type a **budget** on the account or in the list and it carries on to the following months until you change it. **Remaining** shows what is left.
- The first month you use it, add any previous accruals by hand under **Previous months' accruals**. **Download Excel** saves the whole month.
- **The accountant's store charges**. At the bottom of the P&L log, choose the store charges workbook the accountant sends and press **Read it in**. The month is taken from the file, and each account's invoices, accruals, prepayments, transfers and opening and closing stock are filled in. Every account is checked against the accountant's own total and anything that doesn't match is listed. Labour, payroll, delivery commission and other ledger lines that aren't accounts in the log are left out. Reading the same file again replaces what it added and leaves lines you typed alone.

For managers

MANAGERS

Sign in with your email address (Manager sign in). Then the **Edit layout** cog and **Store settings** are yours to use for your store.

Manager sign in

Change your store's floorplan layout, shift targets and password.

Email address

Password

Sign in

Managers: no account yet? [Create one](#). It takes a minute, and an admin approves it before you can sign in.

Not a manager? You don't need an account to use the floorplan: open your store from the [Stores page](#) and type its password.

Manager sign in.

Editing the layout

The layout is the set of stations and positions on the floorplan. Press the **cog** (Edit layout) next to Print and Screenshot on the floorplan. The page switches to the layout editor, and a bar with **Discard changes**, **Save** and **Close** appears at the top.

Edit layout

Discard changes

Save

Close

Lunch & Dinner

Breakfast

Show live figures: ☒ Hourly sales ☒ Hourly labour

Copy to Lunch & Dinner

Reset to default

Leaders

Always at the top of the floorplan 4 slots

Shift Manager

DT Leader

Service Leader

Kitchen Leader

BDAP

Booth 1

Order Assembly

Made For You

Batch

Hourly Sales

Hourly Labour

Other

eLearning etc.

Maintenance

Maint/Delivery

The layout editor: groups in columns, stations and positions you can drag, rename and add to.

- There are two layouts: **Breakfast**, and **Lunch & Dinner** (which Dinner and Overnight use too). Switch between them with the tabs. The editor opens on the one for the shift you were looking at.
- **Groups** (such as "Made For You") are boxes on the floorplan. Drag a group by its handle (the dots) to another column, or to **Drop here to start a new column**. A blue line shows where it will land.
- In each group, **stations** hold **positions**. Type over a name to rename it. Use the **minus and plus** to change the number of positions (1 to 20), and type a name for each position, such as "Order Taker".
- **+ Add station** offers the standard stations, grouped by Breakfast and Lunch & Dinner (ones already in use are greyed out), or a blank **Custom station**. Standard stations keep working with Auto-assign.
- **+ Add group** makes a new group. Leave its heading blank to show none. The cross removes a group or station and asks you to confirm.
- **Hourly sales** and **Hourly labour** tick boxes show or hide those tables.
- **Copy to ...** copies this layout to the other tab. **Reset to default** goes back to the standard layout (it asks you to click again).
- Removing a station or position puts anyone planned there back in the To place list. **Leaders** always stay at the top.
- Press **Save**. The new layout shows straight away on every screen. **Close** asks you to confirm if you have unsaved changes.

The same editor is on the Store settings page, if you prefer to work there.

Store settings

From the floorplan press **Store settings**, or from the Stores page press the store's **Settings**, or choose **Settings** on the store's bar. Press **Take the tour** at the top right for a one-minute walk through it. The page has:

- **Floorplan layout**: the editor above.
- **Shift targets**: the four targets across the top of the floorplan (name, target and colour) and the focus actions shown on the Shift targets view.
- **Daily shift notes email**: see the daily tasks email.
- **Sickness and absence marking** (admins): switch the mark sick buttons on or off for the store.
- **Password and LifeLenz**: the floorplan password and the LifeLenz connection.

Shift targets

The four targets along the top of the floorplan, and the focus actions on its Shift targets view.

Target 1

Green

Name

Target

OEPE

< 150s

Focus actions (one or two lines)

e.g. Check scales every 15 minutes

Target 2

Blue

Name

Target

CRT

< 4.5 mins

Focus actions (one or two lines)

e.g. Check scales every 15 minutes

Target 3

Purple

Name

Target

R2P

< 200s

Focus actions (one or two lines)

e.g. Check scales every 15 minutes

Target 4

Yellow

Name

Target

Courier rating

> 4 stars

Focus actions (one or two lines)

e.g. Check scales every 15 minutes

Shift targets in Store settings.

The floorplan password

Under **Password and LifeLenz**, type the password crew use and press **Save password**. It is the same password for the floorplan and the Training pages. Change it when someone leaves, and tell the team. A store with *no* password is open to anyone with the link, and its Training pages need a manager login.

Connecting LifeLenz

At a glance: on the **Stores** page, everyone can see under each store whether LifeLenz is connected (green), not connected (red) or not checked yet (grey). It's checked every 30 minutes. Each store also has a **Reconnect** button. For a manager of that store (or an admin) it opens these same steps. For anyone else it asks them to sign in as a manager first, or to ask the store's manager.

ShiftTools reads shifts from LifeLenz with a sign-in token that you hand over from your own LifeLenz sign-in (below). By default it is **not stored**: the connection is held in the Raspberry Pi's memory only (never on its memory card), so a restart clears it. A store can switch on **Keep it for emails and kitchen screen** (under **Password and LifeLenz** in Store settings, or the tick on the Connect page), which keeps an **encrypted** copy so the daily emails and the kitchen screen keep working when nobody has connected. The token is never shown on any page. LifeLenz's own web page extends a sign-in before it runs out, and ShiftTools can do the same: press **Renew now** under **Password and LifeLenz** in Store settings to try it. ShiftTools also renews every connection about every 6 hours by itself (the server setting `LIFELENZ_AUTO_RENEW=1` in `admin.env`), so a connected store stays connected without anyone using Send to ShiftTools again. **Renew all** on the Stores admin page does it for every store at once. If it stops working (for example after a restart, for a store that doesn't keep its connection), a red banner appears on the floorplan ("LifeLenz isn't accepting this store's connection") and an admin may get an email. To fix it:

Password and LifeLenz

The password crew type to open this floorplan, and the LifeLenz connection it reads shifts from.

Floorplan password

riverside1

Save password

● **LifeLenz is connected**

Last checked Wed 14 Oct, 11:27. It's checked automatically every 30 minutes.

Check now

LifeLenz token

.....

Save and check token

Connect without copying tokens

- Once only:** drag this button up to your bookmarks bar (the Favorites bar in Safari):

Send to ShiftTools

Can't see the bar? Press Ctrl+Shift+B.

Can't drag it? Use **the steps for your browser** below.
- Each time it needs renewing:** open LifeLenz and sign in with Microsoft as usual.

Open LifeLenz in a new tab
- On the LifeLenz tab, once the schedule has loaded, **click Send to ShiftTools** in your bookmarks bar. A small window saves the connection, checks it and closes itself.

► Steps for your browser (if the button won't drag, or you use Edge or Safari)

On a phone or tablet, use the paste box above instead.

Password and LifeLenz in Store settings, with the connection status.

- Press **Reconnect** under the store on the Stores page, or open Store settings and find **Password and LifeLenz**.
- Once only:** drag the **Send to ShiftTools** button up to your bookmarks bar (the Favorites bar in Safari). Can't see the bar? Press `Ctrl + Shift + B` (`Cmd + Shift + B` on a Mac), or in Safari choose View, then Show Favorites Bar.
- Press **Open LifeLenz in a new tab** and sign in with Microsoft as usual. Wait for the schedule to load.
- On the LifeLenz tab, click **Send to ShiftTools** in your bookmarks bar. A small window saves the connection, checks it with LifeLenz and **closes itself**. If you look after more than one store, it asks which stores to save it for first, and you press **Save and check**.
- Back on the settings page, the green **Connected** message appears by itself (no need to reload).

Press **Check now** to test the connection. It also checks itself every 30 minutes. If the button won't drag (Microsoft Edge, or Safari on a Mac), the page shows the alternative steps for **Windows** and **Mac** (Chrome, Edge and Safari), with the Mac shortcuts (`Cmd` in place of `Ctrl`). If your browser blocks the ShiftTools window as a pop-up, allow pop-ups for LifeLenz and click the button again. The button only works on LifeLenz's own page, which is why ShiftTools can't do it for you from here.

The daily tasks email MANAGERS

Each morning ShiftTools can email the store the day's **shift notes** as a list of tasks: who it's for, what their shift is, and the note. It is sent from 06:00 and only on days when there are notes.

Subject: Today's Tasks: Riverside, Friday 9 October

Today's Tasks

Riverside · Friday 9 October

Breakfast · 05:00–11:00

Who	Shift	Task
Alex Morgan	06:00–12:30 · Fries → Service (Drive-Thru)	Food Safety verification due: Sam to observe
Casey Hughes	08:00–14:30 · Fries	Manager meeting 2pm
Drew Patel	09:00–15:30 · Fries	Verification renewals: Allergen Awareness (overdue 4d), Stock Delivery (12d)

Lunch · 11:00–16:00

Who	Shift	Task
Robin Clarke	12:00–18:30 · Kitchen - Main Menu	Deep clean the fryers before close

Dinner · 16:00 onwards

Who	Shift	Task
Kai Bennett	17:00–23:30 · Fries	Return to work meeting

Tasks are the notes managers add to shifts in LifeLenz. They also show on the floorplan with a note icon. A one-page A4 PDF is attached, ready to print and put on display. [Open the floorplan](#)

The Today's Tasks email, grouped by Breakfast, Lunch, Dinner and Overnight.

- Tasks are grouped by daypart, using when the shift starts: Overnight (before 05:00), Breakfast (05:00 to 11:00), Lunch (11:00 to 16:00) and Dinner (16:00 on).
- A **one-page A4 PDF** is attached, ready to print and put up so everyone knows what's expected on their shift.

Today's Tasks

Riverside · Friday 9 October

Breakfast · 05:00–11:00

Alex Morgan	06:00–12:30 · Fries > Service (Drive-Thru)	Food Safety verification due: Sam to observe
Casey Hughes	08:00–14:30 · Fries	Manager meeting 2pm
Drew Patel	09:00–15:30 · Fries	Verification renewals: Allergen Awareness (overdue 4d), Stock Delivery (12d)

Lunch · 11:00–16:00

Robin Clarke	12:00–18:30 · Kitchen - Main Menu	Deep clean the fryers before close
--------------	-----------------------------------	------------------------------------

Dinner · 16:00 onwards

Kai Bennett	17:00–23:30 · Fries	Return to work meeting
-------------	---------------------	------------------------

Tasks are the notes managers add to shifts in LifeLenz.

The attached PDF, one A4 page, ready to display.

Setting it up

1. Open Store settings and find **Daily shift notes email**.
2. Type one or more email addresses, separated by commas, and tick **Send the email every morning**. Press **Save**.
3. Press **Send today's tasks now** to check it arrives.

Daily shift notes email

Managers can add a note to a shift in LifeLenz. Each morning, this sends a "Today's Tasks" email: the day's shifts that have a note, split into Breakfast, Lunch, Dinner and Overnight, with who it's for, what the shift is and the task. Nothing is sent on a day with no notes.

Email addresses (separate with commas)

☒ Send the email every morning

Send today's tasks now

Send the next 7 days' tasks

These send straight away to the saved addresses. The weekly one lists each day that has tasks, split by Breakfast, Lunch, Dinner and Overnight. It can take a few seconds.

Daily shift notes email in Store settings.

Send the next 7 days' tasks sends one email for the whole week, each day with its tasks grouped by daypart, and a one-page PDF too. Each store has its own addresses and its own on/off switch.

Tasks come from the notes on shifts, including those added by **Plan notes for next shifts** in Training, so verifications get planned in.

Help and fixes

EVERYONE

I can't see anyone in the To place list

Check the date and shift at the top. If they are right, nobody is rostered then, or LifeLenz isn't connected (a red banner shows if so). You can still add someone with **Add shift**.

A red banner says LifeLenz isn't accepting the connection

Shifts and clock-ins can't load until it is reconnected. A manager does it in Store settings (see Connecting LifeLenz).

Everyone shows as "Not in"

Clock-in status comes from LifeLenz and refreshes every few minutes. If clock-ins can't be read, a message says so and everyone shows as not clocked in.

I changed a shift but someone else can't see it

Placing people on stations is shared, but added or edited shifts stay on the device you used. Make the change in LifeLenz, or do it on every screen that needs it.

The password page keeps saying it's wrong

Check with your manager that you have the current password. After too many wrong tries you have to wait 15 minutes.

Auto-assign is greyed out

It has already been run for this shift. Reset the floorplan to run it again.

My manager account isn't working

New accounts have to be approved by an admin first. Sign in with your email address; capital letters don't matter. Ask an admin to check your account if it still won't let you in.

The print is cut off or runs to two pages

Choose **A4, Landscape**, and leave scale at 100% or Default. If it still doesn't fit, tell us which browser you're using.

Something else

Use **Send a suggestion** on the Stores page, or ask your manager.

Words used here

LifeLenz

The rostering system. ShiftTools reads shifts, clock-ins, breaks, notes and sales figures from it.

Floorplan

The plan for a shift showing who is on which station.

Group, station, position (slot)

A group is a box on the floorplan (such as "Made For You"). It holds stations (such as "Line 1"), and each station has positions for people.

Shift (daypart)

Breakfast, Lunch, Dinner or Overnight.

To place

People on this shift who aren't on the floorplan yet.

Store password

The password for the floorplan and Training pages. Managers set it.

Manager login

An email address and password for changing layouts and settings.

Note (shift description)

A short message on a shift in LifeLenz.

Verification

A check that a crew member can do a task or station to standard, recorded in MyTraining. Many need renewing.

SRIW, WVP

Respectful-workplace and workplace-violence eLearning courses, which expire and need renewing.

Crew Trainer

A crew member who carries out verifications for others.

Coverage

The share of the crew trained on a verification.

Turnover (12 months, year to date, 90-day)

The share of the crew who have left over that period, as the Hiring & Turnover report works it out.

HIG chat

A catch-up chat with a new hire at 2, 4, 6, 8, 12 and 24 weeks after they start (weeks 6 and 8 aren't needed for adults).

On-boarding

The things a new starter has to complete (ETW, online orientation, bank details, NI number, CDP and a probation review, which is due within three months of starting), as listed in the report.