ShiftReady Quick Start

Getting from a brand-new account to a published schedule.

Set aside about 30 minutes for your first location. Setup is the hardest part — once it's done, generating a schedule takes one click.

Before you start

Have these two things roughly in mind. You don't need them written down, but the setup will go faster:

- **The jobs people do at your business** — cashier, cook, server, whatever you call them.
- **How many people you need on each job, and when.** For example: two cashiers from 7am to 1pm, two more from 1pm to 7pm.

Step 1 — Create your account and location

1. Go to **shiftreadyhq.com** and sign up. You're the owner of the account.
2. Add your first location — the store name and address.

If you have more than one store, add just the first one for now. Get one working before you set up the rest.

Step 2 — Add your positions

Positions are the jobs people do. Add one for each role you schedule separately.

Keep it simple. If a cashier and a server are genuinely interchangeable at your place, that's one position, not two. If they need different training, make them two.

Step 3 — Set your coverage rules

This is where you tell ShiftReady what a properly-staffed day looks like. For each position, you set:

- **The hours it needs covering** — and you can set different hours for different days.
- **Minimum staff** — the fewest people you can run with.
- **Ideal staff** — what you'd like if everyone's available.

The scheduler aims for your ideal number and will warn you when it can't even hit your minimum.

Take your time here. Coverage rules are the single biggest thing that determines whether your schedules come out right. Everything downstream depends on them.

Step 4 — Add your staff

Two ways to do this, and you can mix them:

Invite them by email — they get an email, set their own password, and fill in their own availability. Less work for you, but you wait on them.

Add them yourself — you enter their details and fill everything in. Faster to a working schedule. You'll need their **first name, last name, and an email address** for each person.

If you want a schedule today, add them yourself.

Step 5 — The three things that make someone schedulable

This is the part that catches almost everyone. A person has to clear **all three** of these before the scheduler will ever put them on a shift:

1. Approve them. Go to your Dashboard and approve them. Until you do, they won't even appear in your team list.

2. Give them a position. Assign the jobs they do.

3. Mark them qualified. Assigning a position is *not* the same as marking them qualified. Anyone assigned a job but not marked qualified is treated as **in training** — they'll only ever be scheduled alongside someone who can train them, and they don't count toward your staffing numbers.

If someone isn't showing up on schedules, it is almost always one of these three.

Step 6 — Availability (read this bit carefully)

Availability works the opposite way to how most people expect.

- **Leave every day unticked** and that person is treated as **fully available** — they can be scheduled any day, any shift. This is usually what you want when you're first setting up.
- **The moment you tick even one day**, every day you *didn't* tick counts as "can't work."

So if someone works Monday, Tuesday and Wednesday, tick all three. Ticking just Monday tells the app they can't work the other six days.

One more thing: the hours you set have to *fully cover* a shift for that person to be scheduled on it. If a shift runs 7am–1pm and someone's availability says 8am–5pm, they can't take that shift — they'd be an hour late. When in doubt, set their hours wider, or leave the day unticked entirely.

Step 7 — A fairness tip worth 30 seconds

If you have several people doing the same job, give them **matching minimum and maximum weekly hours**.

ShiftReady uses those numbers to work out who should get roughly equal shifts. When people in the same role have mismatched settings, one of them can quietly end up with far more shifts than another — and it looks like the app is playing favourites when it's really just following the numbers you gave it.

Step 8 — Generate your schedule

Pick your week and hit generate. You'll get a **draft**.

- Your staff **cannot see a draft.** Review it, change anything you want, and only then publish. Publishing is what makes it visible to them.
- The scheduler spreads shifts fairly, avoids putting the same person on more than five days, and avoids doubling someone up on two shifts in one day.
- When it *has* to break one of those rules to keep you properly staffed, it flags that shift and tells you why — click the shift to see the reason. Nothing happens silently.
- If it can't meet your minimum staffing at all, you'll get a warning saying which day and which position came up short.

If the schedule looks thin, the usual cause is one of the three gates in Step 5, or availability from Step 6.

What comes next

You now have a working schedule. These are worth exploring once that's running:

Coverage by text *(paid plans)* — when someone can't make a shift, they tap "Can't make it" in the app and you get a text straight away. Reply **COVER** to that text and everyone qualified and available gets texted the open shift. First person to reply **YES** gets it, and your schedule updates itself.

Setup note: each employee replies **YES** once to a confirmation text before the system can text them. New hires won't receive coverage texts until they've done that.

Clock in and out — two ways to do it, and you can use either or both. Hours flow into timesheets automatically, and you can always enter or correct time yourself. Covered in its own section below.

Timesheets and payroll export *(paid plans)* — approved hours export as a CSV for your payroll provider.

Clocking in and out

You don't have to use this. If you already have something for clocking in and out that works, keep it. The scheduler stands on its own, and so does call-out coverage — use the parts that help you and leave the rest.

If you do switch over later, run both systems side by side for a full pay period first. Compare the hours at the end and make sure they line up before you retire the old one. Not because we expect a problem — it's just the sensible way to change anything that touches people's pay.

Two independent ways to clock in. Turn on either one, or both — they work side by side, and having both means there's always a fallback.

Option 1 — Scan a code on a dedicated screen

You set up a tablet, spare phone, or old laptop at your location as a **clock-in screen**. It shows a code that staff scan with their own phones to clock in and out.

How to set it up:

1. On the device you want to use as the screen, log into ShiftReady as the owner or a manager.
2. Go to the clock display page and choose to set up that screen.
3. Give it a name if you like, and confirm.

Two things you need to know before you do this:

That device needs to be dedicated to the job. It sits somewhere staff can reach it, showing the clock-in code. It isn't a device you'll keep using for other things.

Setting it up will log you out on that device — and that's deliberate. Once the screen is paired, it holds nothing but a key that can display clock-in codes. There's no account signed in on it, so nobody can pick up that tablet and get into your business. **You stay logged in everywhere else** — your own computer and phone are unaffected. If you ever want the device back, unpair it and log in again as normal.

The code on screen refreshes **every 30 seconds**, so a photo of it taken earlier won't work — staff have to actually be in front of the screen.

Staff also need to be **signed into ShiftReady on their phone** to clock in this way. The first scan of someone's first shift often lands on a sign-in prompt; once they sign in, scanning again goes straight through.

Option 2 — Clock in by location (GPS)

Staff tap a button in the app and clock in without scanning anything, as long as they're physically at your location. This one takes a few minutes of setup and is **off until you turn it on**.

How to set it up:

1. **Go to the location's settings on a phone, standing at the location.** This matters — the app reads the coordinates off the device you're holding. Doing it from a desktop at home puts your business in the wrong place, sometimes by a few hundred feet.
2. Choose **Use my current location**. The app checks how accurate the reading is and will warn you if it's too rough to be trusted.
3. **Set how far from that point counts as "at work."** The default is 500 feet, which suits most sites. A large lot or a strip mall may want more; a small shop, less.
4. **Switch GPS clock-in on.**

Worth knowing:

- **Location is checked on our servers, not on the phone.** A staff member can't fake being at work by telling their phone to report a different position.
- **Phones with a weak signal aren't punished.** If someone's phone reports a fuzzy location, the app allows for that margin rather than turning them away. Indoors, near a fridge, at the back of a building — it's forgiving on purpose.
- **If someone's too far away, they're told the distance and pointed at the scan option** rather than hitting a dead end.
- **A phone can refuse to share location in two different places** — the browser and the phone's own settings. If staff say they allowed it and it still won't work, the phone's system-level location setting is usually the culprit.

Which should you use?

First, one thing that applies to both: staff clock in with **their own phone** either way — GPS taps a button in the app, and the code is scanned with their phone camera while signed in as themselves. Neither method works on a phone that's dead or left at home. See below for what to do about that.

Use both if you can. GPS is the easier day to day — nothing to walk over to, nothing to scan. The scan screen covers the cases where GPS won't play: a staff member who won't allow location access, a weak signal that won't settle, or someone genuinely out of range. Scanning works regardless of location permissions.

If you only want one to start with, the scan screen is the simpler thing to set up — no coordinates to capture, no radius to decide.

You can always enter time yourself

Whatever the clock says, you have the final word on it. In Timesheets you can add, edit or delete a punch at any point — before a shift, in the middle of one, or days afterwards when someone flags a mistake.

When it's useful:

- **A dead battery, a phone left at home, a cracked screen.** No clock-in method fixes this, and you don't need one. Enter their hours yourself.
- **Someone forgot to clock in and is already working.** Add the punch now, with the time they actually started, and **leave the clock-out blank** — they're on the clock from that moment and can clock out normally at the end.
- **Someone forgot to clock out.** Edit the punch and put the right finish time in.
- **A new hire who hasn't got signed in yet.** Their hours still get recorded from day one.

Only the clock-in date and time are required — the clock-out can be filled in later. Nothing is locked, so a wrong entry can be corrected or removed.

Worth telling staff up front, so nobody panics or works an unpaid shift thinking they're stuck: *if your phone's out of action or you forget to clock in, just tell your manager and they'll put your hours in.*

Plans

Free — one location, up to 10 people. No card, ever. Stay on it as long as you like.

Growth and Pro — more locations and staff, plus coverage-by-text and payroll export. Both start with a **30-day free trial**. The trial does ask for a card when you start it, but **nothing is charged for 30 days**, and you can cancel before then at no cost.

Stuck?

The three most common problems, in order:

1. **Someone isn't being scheduled** → check the three gates in Step 5. Approved? Position assigned? Marked qualified?
2. **Someone's barely getting shifts** → check their availability (Step 6). Ticked days limit them; the hours have to cover the whole shift.
3. **Schedules look unbalanced between people doing the same job** → check their minimum and maximum hours match (Step 7).
4. **Someone can't clock in by location** → check GPS clock-in is switched on for that location, that the coordinates were captured *at* the site on a phone, and that the person allowed location access in **both** their browser and their phone's settings. Scanning the code works in the meantime.
5. **Someone's phone is dead, at home, or they forgot to clock in** → neither method will work, and it doesn't matter. Add or edit their punch yourself in Timesheets — you can do this at any time, including mid-shift.

If none of those explain it, get in touch — we'd rather hear about it early.