

PRODUCT REQUIREMENTS DOCUMENT

7Shifts Scheduler Templates

Implementation Guide for Management Team
Shakey's El Monte

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1. Executive Summary

This document outlines a comprehensive, step-by-step implementation plan for adopting 7Shifts Scheduler Templates across the management team at Shakey's El Monte. Scheduler templates are one of the most powerful yet underutilized features in 7Shifts. When properly configured, they transform the weekly scheduling process from a manual, hour-long task into a streamlined 10–15 minute review-and-publish workflow.

Templates serve as blueprints, not finished schedules. They define which shifts need to be filled, what roles and skill levels are required, and what days those shifts apply to. When you apply a template, 7Shifts automatically matches available, qualified employees to each shift based on their availability, time-off requests, and skill level. The result is a draft schedule that only needs minor adjustments before publishing.

1.1 Goals

- Reduce weekly scheduling time from 60+ minutes to under 15 minutes per department
- Ensure consistent staffing levels across all shifts by codifying your ideal coverage
- Enforce skill-level requirements so newer employees are not placed in advanced positions
- Keep labor costs within target percentages by tying templates to labor budgets
- Empower all managers to produce consistent, high-quality schedules without guesswork
- Create seasonal template variants to handle volume fluctuations (holidays, summer, etc.)

1.2 What a Template Is (and Is Not)


A template is a reusable pattern of shifts for a specific location and department. It defines shift times, roles, skill levels, and day-of-week assignments. It does not contain employee names (unless you specifically assign a person to a shift). When you “Fill from Template,” 7Shifts reads the template and auto-assigns employees based on current availability and qualifications.

⚠ WARNING: *A template is NOT a published schedule. It is a blueprint. You must still review and publish after applying it.*

2. Prerequisites Checklist

Before creating your first template, the following must be properly configured in your 7Shifts account. Skipping these steps will cause templates to auto-fill incorrectly or not at all. Work through each item in order.

#	Prerequisite	Why It Matters	Where to Check
1	Account Structure (Locations, Departments, Roles)	Templates are location+department specific. If your structure is wrong, templates won't match the right people.	Settings > Locations / Departments / Roles
2	All Employees Added with Correct Assignments	Employees must be assigned to the correct Location, Department, and Role(s). Unassigned employees appear as "No Role" and won't be picked up by templates.	Team > [Employee] > Assignments tab
3	Skill Levels Set on Employee Profiles	Templates can require specific skill levels. If employees are all left at the default (Level 1 / Beginner), skill-based filtering won't work. Update profiles to reflect actual proficiency.	Team > [Employee] > Assignments > Skill Level
4	Employee Availability Submitted and Approved	The auto-fill engine checks approved availability. If employees haven't set their availability, the system has no constraints to work with and may over- or under-schedule people.	Schedule > Availability requests queue
5	Time-Off Policies Configured	Approved time-off is respected during auto-fill. Pending requests are not. Ensure all time-off requests are resolved before applying a template.	Team > [Employee] > Time Off tab
6	Toast POS Integration Active	POS integration enables projected sales in the labor budget tool. Templates can include labor target % that reference these projections for smarter scheduling.	Apps & Integrations > Toast
7	Labor Budget Targets Established	Templates let you set a Labor Target % and Projected Sales. Without baseline targets, you lose the ability to schedule against budget goals.	Schedule > Labor Budget Tool (bottom of page)
8	Manager Permissions Granted	Managers/Assistant Managers need "Can manage templates" permission. Without it, they can't create, edit, or apply templates.	Team > [Manager] > Permissions tab

 **TIP:** Complete prerequisites 1–5 before your first template training session. Have managers verify their own team's data so they take ownership of accuracy.

3. Configuring Skill Levels

Skill levels are the secret weapon of scheduler templates. They let you define proficiency requirements per shift, ensuring you never accidentally staff a Friday dinner rush with only trainees. 7Shifts supports multiple skill levels per role, and employees default to Skill Level 1 (Beginner) unless you update their profile.

3.1 Recommended Skill Level Framework

Below is a suggested skill level structure for Shakey's. Adapt the descriptions to match your actual training milestones and expectations.

Level	Label	Description	Typical Timeline
1	Beginner	New hire in training. Requires close supervision. Cannot work alone on station.	First 0–30 days
2	Intermediate	Completed training checklist. Can work station independently during moderate volume. Still needs support during rushes.	30–90 days
3	Advanced	Fully proficient. Can handle rush periods independently. Capable of training others on the station.	90+ days, performance verified
4	Expert / Lead	Station lead or shift lead qualified. Can manage entire section/area, troubleshoot issues, and direct other team members.	6+ months, manager-approved

3.2 How to Update an Employee's Skill Level

1. Log in to the 7Shifts web app as an Admin or Manager with “Can edit employees” permission.
2. Navigate to Team in the left navigation bar.
3. Click on the employee's name to open their profile.
4. Click the Assignments tab.
5. Under each Role the employee is assigned to, you'll see a Skill Level dropdown. Change it from the default (Level 1) to the appropriate level.
6. Click Save.

⚠ WARNING: Skill levels are per-role. An employee can be Level 3 as a Server but Level 1 as a Bartender if they're cross-trained but new to bar.

💡 TIP: Do a bulk review: pull up each department and go through every employee. This is a one-time effort that pays off every single week when templates auto-fill correctly.

4. Manager Permissions Setup

For your management team to fully utilize templates, they need specific permissions enabled. Without these, they'll be able to see the schedule but not create or apply templates.

4.1 Required Permissions

Permission	What It Enables	Required For
Can manage templates	Create, edit, copy, delete, and apply templates to the schedule.	All managers doing scheduling
Can manage schedules	Add, edit, and delete shifts. Required to make adjustments after applying a template.	All managers doing scheduling
Can delete schedules	Required to apply templates to weeks that already have existing shifts (merge or replace).	Lead schedulers only
Can manage sales projections	Edit projected sales in the labor budget tool. Helps managers adjust forecasts before filling from template.	Senior managers
Can view wages	See labor costs in the budget tool. Without this, managers can't assess if the schedule is within budget.	All managers doing scheduling

4.2 How to Update Permissions

1. Go to Team in the left nav, click on the manager's name.
2. Click the Permissions tab.
3. Toggle on each required permission.
4. Click Save.

i NOTE: Only Admins can change Manager permissions. Managers cannot edit their own permissions or those of other Managers at the same level.

5. Creating Your First Template

This is the core of the implementation. A well-designed template captures your ideal staffing pattern for a given department and day-type. You'll likely create multiple templates: one for standard weeks, one for high-volume periods, and possibly one for holidays or reduced operations.

5.1 Step-by-Step: Create a Template

1. Log in to the 7Shifts web app. Navigate to Schedule in the left nav.
2. Use the filters at the top to select the correct Location (Shakey's El Monte) and Department you want to template.
3. Click the Copy icon (looks like two overlapping pages) in the upper-right area of the schedule.
4. Select Manage Template from the dropdown.
5. Click + New Template (or the equivalent button).
6. Name your template descriptively. Use a naming convention like: [Department] - [Type] - [Season]. For example: "FOH - Standard Week - Regular" or "BOH - High Volume - Summer."
7. Select the Location and Department, then click Save.
8. The template editor opens. At the top, you can optionally set a Labor Target % and Projected Sales. These are location-wide (not department-specific) and will carry over when you apply the template.
9. Click + Add Shift to begin building your shift pattern.


5.2 Configuring Each Shift in the Template

For every shift you add, you'll make four key decisions:

5.2.1 Shift Type (Who Fills It)

This is the most important choice. You have three options for each shift:

Shift Type	How It Works	When to Use
Skill Level	7Shifts auto-fills with any available employee who meets the required skill level for the assigned role. This is the most flexible and powerful option.	Most shifts. This is your default choice.
Specific Person	Locks a specific employee into that shift every time the template is applied. Only employees from the selected Location/Department are listed.	Shift leads, key holders, or positions that require a specific person (e.g., the GM's standing shift).
Open Shift	Creates an unassigned shift. Appears in the Unassigned Shifts area. Can be published to the Shift Pool for employees to bid on.	Flexible coverage needs, extra shifts during events, or when you want employees to volunteer.

 **TIP:** Use Skill Level for 80%+ of your shifts. This gives 7Shifts the flexibility to auto-assign the best available person. Reserve Specific Person for truly fixed assignments.

5.2.2 Role Selection


Select the role this shift requires (Server, Cook, Cashier, etc.). You can also leave the Role field blank to create a “No Role” shift, which has no specific role requirement. This is rarely useful in practice; always assign a role for accurate scheduling and reporting.

5.2.3 Shift Times and Breaks

Set the start time, end time, and scheduled break duration. These times apply to every day you select for this shift. If the same role needs different times on different days, create separate shifts for each time pattern.

5.2.4 Day-of-Week Assignment

Check which days of the week this shift should appear on. For example, you might have an “Opener” shift that applies Monday through Sunday, but a “Friday Rush Extra” shift that only applies to Friday and Saturday.

 **NOTE:** Templates do not support decimal values for labor targets. Only whole numbers are accepted. Use the Labor Budget Tool directly if you need decimal precision.

6. Template Strategy for Shakey's

Rather than creating one giant template that tries to cover everything, build a library of focused templates. This gives you flexibility to mix and match based on business conditions.

6.1 Recommended Template Library

Template Name	Department	Use Case	Key Characteristics
FOH - Standard Week	Front of House	Normal business volume, no holidays or special events.	Balanced coverage. Mix of Skill Level 2+ for most shifts, Level 1 allowed on slower days.
FOH - High Volume	Front of House	Weekends near holidays, local events, school breaks.	Extra coverage on Fri/Sat/Sun. Skill Level 3+ required for peak shifts.
FOH - Reduced (Slow Season)	Front of House	January, post-holiday lulls.	Fewer shifts, tighter coverage. Focus on keeping labor % low.
BOH - Standard Week	Back of House	Normal kitchen operations.	Prep shifts, line shifts, closing shifts defined. Skill Level 2+ for line during peaks.
BOH - High Volume	Back of House	Weekends, holidays, catering days.	Added prep shifts, overlapping line coverage. Skill Level 3+ for all dinner line positions.
BOH - Reduced	Back of House	Slow periods.	Minimal staffing. Combined stations.

6.2 Naming Convention

Consistent naming is critical when you have multiple templates. Adopt this format and enforce it across all managers:

[DEPT] - [VOLUME] - [VARIANT]

Examples: "FOH - Standard - Regular," "BOH - High Volume - Summer," "FOH - Reduced - Post-Holiday." This makes it immediately clear which template to pick when filling a schedule.

6.3 Copying Templates for Seasonal Variants

Instead of building seasonal templates from scratch, copy an existing one and modify it. This preserves your base structure and lets you adjust only what changes.

1. Go to Schedule > Click the Copy icon > Manage Template.
2. Find the template you want to copy.
3. Click the Copy icon next to that template.
4. Rename it with the new season/variant identifier.

5. Adjust shifts as needed: add extra coverage, change skill level requirements, or modify times.

⚠ WARNING: Copies can only be made within the same Location and Department. You cannot copy a FOH template to use in BOH.

⚠ WARNING: Scheduled breaks do not copy over with templates. You'll need to re-add break configurations.


⚠ WARNING: If your location has an integrated POS, sales projections from the template will not carry over. The POS projections take precedence.

7. Filling a Schedule from a Template

This is the weekly workflow your managers will follow. Once templates are built, this is where the time savings happen.

7.1 Weekly Scheduling Workflow

1. Log in to 7Shifts web app. Go to Schedule.
2. Use the date picker to navigate to the week you want to schedule. Use the Location and Department filters to select the right context.
3. Click the Copy icon > select Fill from Template.
4. A list of available templates for this Location/Department appears. Select the appropriate one (Standard, High Volume, Reduced, etc.).
5. Choose whether to Include labor percentage targets from the template. If your POS integration already feeds sales projections, you may skip this. If not, including it sets a baseline budget goal.
6. Click Submit.
7. If the schedule week already has existing shifts, you'll be asked: Merge (add template shifts alongside existing shifts) or Delete existing shifts first. Choose based on your situation.
8. 7Shifts now auto-fills the template. It matches each shift to an available employee who meets the role and skill level requirements, respecting approved availability and time-off.
9. Review the auto-filled schedule. Look for:
 - Unassigned shifts (the system couldn't find a match — shown in the Unassigned Shifts section)
 - Overtime warnings (red highlights)
 - Scheduling conflicts or labor law violations
 - Labor budget tool showing red (over budget) or green (within budget)
10. Manually fix any issues: drag-and-drop unassigned shifts to available employees, swap shifts, or adjust times.
11. Once satisfied, click Publish. Employees receive notifications about their shifts.

 **TIP:** Establish a weekly rhythm: Templates should be filled every [day of week] for the following week. For example, every Wednesday, managers fill templates for the following Monday–Sunday. This gives employees at least 4–5 days notice.

7.2 Handling Unassigned Shifts

After applying a template, some shifts may remain unassigned. This happens when no employee meets all the criteria (available + right role + required skill level). You have several options:

- Drag-and-drop from the Unassigned Shifts section to an available employee on the schedule.
- Publish unassigned shifts as Open Shifts to the Shift Pool, allowing employees to bid on them. This is great for extra shifts or when you need volunteers.

- Manually assign by clicking the shift and selecting an employee.
- If chronically unassigned, revisit your template: the skill level requirement may be too high, or you may need to cross-train more employees.

8. Labor Budget Integration

Templates become even more powerful when tied to labor budget targets. This connection lets you see, in real-time as you build the schedule, whether your planned labor costs are within budget.

8.1 How Templates and Labor Budgets Work Together


When creating a template, you can set a Labor Target % and Projected Sales at the top of the template editor. These values are location-wide (not department-specific). When you apply the template, these values populate the Labor Budget Tool at the bottom of the schedule page.

As shifts fill in, the budget tool calculates your scheduled labor cost and compares it to the target. Green means you're within budget. Red means you're over. This gives managers an immediate visual indicator of whether the schedule is financially sound before they publish.

8.2 Recommended Labor Targets

Set your targets based on historical performance and business goals. Since Shakey's has Toast POS integrated, actual sales data flows in automatically and projected sales become more accurate over time through 7Shifts' machine learning forecasting.

Day Type	FOH Target %	BOH Target %	Combined Target %
Monday – Thursday	[Set based on your data]	[Set based on your data]	[Set based on your data]
Friday – Saturday	[Set based on your data]	[Set based on your data]	[Set based on your data]
Sunday	[Set based on your data]	[Set based on your data]	[Set based on your data]

 **TIP:** Use your Actuals Report (Reports section in 7Shifts) to find your historical labor % by day of week. Set targets slightly below your current average to drive improvement.

9. Management Team Training Plan

Roll this out in structured phases. Don't try to do everything at once. Each phase builds on the previous one.

9.1 Phase 1: Data Cleanup (Week 1)

Who: Admin (you) + all managers

Duration: 2–3 hours total, spread across the week

- Audit all employee profiles: verify Location, Department, Role assignments are correct.
- Set Skill Levels for every employee in every role they're assigned to.
- Ensure all employees have submitted and gotten availability approved.
- Clear any pending time-off requests.
- Verify Toast POS integration is active and sales data is flowing.
- Confirm manager permissions ("Can manage templates" and related permissions).

9.2 Phase 2: Template Design Workshop (Week 2)

Who: Admin + scheduling managers

Duration: 1–2 hour meeting

- As a group, map out the ideal shift pattern for each department on a whiteboard or shared doc.
- Identify how many of each role you need per shift, per day.
- Decide on skill level requirements for each shift (e.g., Friday dinner needs Skill Level 3+ on all line positions).
- Agree on template naming conventions.
- One person (or the group together) builds the first "Standard Week" template for one department in 7Shifts, walking through each step on a shared screen.

9.3 Phase 3: Build All Templates (Week 2–3)

Who: Scheduling managers

Duration: 30–45 minutes per template

- Each manager builds templates for their department(s) following the patterns agreed upon.
- Create at least: Standard Week, High Volume, and Reduced for each department.
- Admin reviews all templates for consistency and correctness.

9.4 Phase 4: Supervised Fill (Week 3–4)

Who: Each scheduling manager, with Admin available for support

Duration: 30 minutes

- Managers apply their Standard Week template to the upcoming schedule.

- Review auto-fill results together. Discuss what filled correctly and what didn't.
- Troubleshoot unassigned shifts: is it a skill level issue? Availability gap? Missing role assignment?
- Adjust template if the pattern needs tweaking.
- Publish the schedule.

9.5 Phase 5: Independent Operation (Week 5+)

Who: All scheduling managers independently

- Managers follow the weekly workflow (Section 7.1) on their own.
- Admin spot-checks published schedules weekly for the first month.
- Monthly team check-in to discuss what's working, what templates need updating, and seasonal adjustments.

10. Common Pitfalls and Troubleshooting

Problem	Cause	Fix
Template fills but many shifts are unassigned	Skill level requirements are too high, or not enough employees have availability submitted.	Lower the skill level requirement for some shifts, or audit employee availability. Make sure all availability requests are approved.
Employee appears in wrong department	Employee's profile assignments are incorrect.	Go to Team > Employee > Assignments. Verify correct Location, Department, and Role.
Labor budget shows red immediately after template fill	Template has more shifts than budget allows, or projected sales are too low.	Adjust projected sales if they're inaccurate, or trim shifts. Check if the POS projections are overriding template values.
Manager cannot find "Manage Template" option	Missing "Can manage templates" permission, or they're on the mobile app (templates are web-only).	Update permissions. Remind managers that template management is only available on the web app, not mobile.
Breaks are missing after applying template	Scheduled breaks do not copy over with templates. This is a known 7Shifts limitation.	After applying a template, manually add breaks to shifts that require them. Consider this part of the "review" step in the weekly workflow.
Same employee scheduled at two locations	Employee is assigned to multiple locations and both templates filled with them.	Coordinate template fills across locations. Fill one location first, then the other. 7Shifts will respect the first assignment.
Template shows "No Role" shifts	When creating the shift in the template, the Role field was left blank.	Edit the template and assign a role to each shift. "No Role" shifts won't auto-fill meaningfully.

11. Ongoing Maintenance and Review

11.1 Weekly

- Apply template, review auto-fill, fix issues, publish. Target: under 15 minutes per department.
- Check that all shifts are assigned. Resolve any Shift Pool bids.

11.2 Monthly

- Review labor % actuals vs. targets. Are templates producing schedules that meet budget goals?
- Update any employee skill levels that have changed (new hires completing training, promotions, etc.).
- Check for any new employees who need proper assignments and availability set.

11.3 Quarterly / Seasonal

- Evaluate whether current templates match business volume. Create new seasonal variants or retire outdated ones.
- Review and refresh the template library. Delete templates that are no longer used to avoid confusion.
- Hold a team meeting to discuss scheduling effectiveness, gather manager feedback, and iterate.

11.4 Annually

- Major template overhaul if the business has changed significantly (menu changes, hours changes, staffing model changes).
- Reassess skill level framework: are the levels still meaningful? Do they need recalibration?
- Update labor targets based on the prior year's financial performance.

12. Quick Reference Card

Print this page and post it in the manager's office.

Action	Steps
Fill a schedule from template	Schedule > Copy icon > Fill from Template > Select template > Include labor targets? > Submit
Create a new template	Schedule > Copy icon > Manage Template > + New Template > Name it > Add shifts
Copy a template	Schedule > Copy icon > Manage Template > Find template > Click Copy icon > Rename
Delete a template	Schedule > Copy icon > Manage Template > Find template > Click Delete icon
Update employee skill level	Team > Employee name > Assignments tab > Skill Level dropdown > Save
Grant template permissions	Team > Manager name > Permissions tab > Enable "Can manage templates" > Save
Check labor budget	Schedule page > Scroll to bottom > Expand Labor Budget Tool > Red = over, Green = within target

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