

ADMIN SECTION:

1) DASHBOARD / ROASTER SECTION:

Here we list all the staff and there shifts. We have options to add new shift for Staff. We have 2 Account on Scheduler Section i.) **OPEN SHIFT:** It is used for store the record for late cancellation shift or some prospect Shift in future that can be confirmed and assigned afterward to any staff.

ii) **PICK UP SHIFT:** If we create any shift and assign it to PICK UP SHIFT then it is used to notify all the staff that new shift available for them to pick up. Staff will apply for the shift to pick up and admin on his discretion can accept any application . which will then notify other staff that the shift is assigned to someone else.

[NEW SHIFT STEPS](#)

[EDIT SHIFT STEPS](#)

[PICK UP SHIFT STEPS](#)

[Repeat a SHIFT Steps](#)

The screenshot shows a web application interface for managing staff shifts. On the left is a sidebar with a logo and a menu containing: 'OPEN SHIFT ADMIN', 'Scheduler', 'Staff', 'Clients', 'Invoices', 'Reports', 'Shift Notes', and 'Account'. The main area displays a calendar for 'September - October 2025'. At the top of the calendar are navigation buttons (Today, back, forward, calendar icon), a 'Staff' dropdown, a 'Weekly' view selector, a '+ Shift' button, and search icons. Below the calendar header is a 'Bulk Action' button. The calendar grid shows dates from Monday 29 Sep to Sunday 05 Oct. The Saturday 04 Oct column is highlighted in blue. The rows are labeled: 'OPEN SHIFT 0 Hours', 'PICK UP SHIFT 0 Hours', 'Rounak Manna 0 Hours', 'Md Salim 2 0 Hours', and 'John Doe'. The cells for Saturday 04 Oct in the first four rows are highlighted in light blue.

	Monday 29 Sep, 2025	Tuesday 30 Sep, 2025	Wednesday 01 Oct, 2025	Thursday 02 Oct, 2025	Friday 03 Oct, 2025	Saturday 04 Oct, 2025	Sunday 05 Oct, 2025
OPEN SHIFT 0 Hours							
PICK UP SHIFT 0 Hours							
Rounak Manna 0 Hours							
Md Salim 2 0 Hours							
John Doe							

2) STAFF SECTION:

We have I.) LIST : It shows all the staff of the organization.

[Add a staff and view staff steps](#)

OPEN SHIFT
ADMIN

Scheduler

Staff

List

Teams

Archived

Document Hub

New

Clients

Invoices

Reports

Shift Notes

Account

Staff List

Q Search user...

<input type="checkbox"/>	Name ↑	Gender	Role	Email	Mobile	Address	Employment Type	
<input type="checkbox"/>	Arijit Ghosh	Male	carer	arijit19@yopmail.com	9955774400	Naihati	Employee	⋮
<input type="checkbox"/>	John Doe	Male	carer	johndoe@yomail.com	8899098721	test	Employee	⋮
<input type="checkbox"/>	Md Salim	Male	carer	mdsalim@yopmail.com	8788921320	Kolkata	Employee	⋮
<input type="checkbox"/>	Md Salim 2	Male	carer	salim@yopmail.com	9865656565	Howrah	Employee	⋮
<input type="checkbox"/>	Mirnal	Male	carer	mirnal@yopmail.com	9685968596	Bandel	Employee	⋮

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II.) TEAM: We can create team from existing staff.

Team steps

OPEN SHIFT
ADMIN

Scheduler

Staff

List

Teams

Archived

Document Hub

New

Clients

Invoices

Reports

Shift Notes

Account

Teams

Q Search user...

Name	Count	Staff	
Test 1	3	Rounak Manna John Doe Arijit Ghosh	⋮
Test 2	1	Md Salim 2	⋮
A	1	Rajdeep Das	⋮

Rows per page: 5 1-3 of 3 < >

III.) ARCHIVED: IF we delete any staff they are listed is archived staff for record , there access is also revoked and if same staff joins back our organization we can just unarchive them .

OPEN SHIFT

ADMIN

Scheduler

Staff

List

Teams

Archived

Document Hub

New

Clients

Invoices

Reports

Archived Staffs

Q Search user...

Name	Email	Mobile No	Phone No	
TEST 1	test@yopmail.com	7278165297	7278165297	<div>Unarchive</div>

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IV) DOCUMENT HUB : To upload Document that can be view by different staff like an event or notice . we can give access to this document hub based on roles of staff.

OPEN SHIFT
ADMIN

Scheduler

Staff

Teams

Archived

Document Hub

New

Clients

Invoices

Reports

Shift Notes

Account

Documents

Max allowed file size: 15MB Upload

Type	Name	Last Update	
pdf	Invoice (5).pdf	January 24, 2025	📄 🗑️ 🔄
pdf	Invoice (6).pdf	January 24, 2025	📄 🗑️ 🔄
pdf	Invoice (6).pdf	January 24, 2025	📄 🗑️ 🔄

Rows per page: 5 1-3 of 3 < >

V) NEW: To add new staff.

OPEN SHIFT
ADMIN

Scheduler

Staff

Teams

Archived

Document Hub

New

Clients

Invoices

Reports

Shift Notes

Account

Add New Staff

Staff detail

Name:

☒ Use Salutation

Select Salutat...

Enter Name

Email:

Enter Email

Contact:

Enter Mobile Number

Enter Phone Number

Carer

Office User

Gender:

Select Gender

Date of Birth: mm/dd/yyyy

Employment Type:

Select Employment Type

Address:

Enter Address

Cancel

Create

3) CLIENTS:

[New Client steps\(Here we are adding temporary client\)](#)

[View Client](#)

I.) LIST: LIST of all the client .

OPEN SHIFT
ADMIN

Scheduler

Staff

Clients

Temporary List

Archived

Documents Templates

New

Client Notes

Invoices

Reports

Shift Notes

Account

Client List

Name	Gender	Age	NDIS	Recipient ID	Mobile	Phone	Email	Address	Type	Pricebook	Review
Abhishek Santra	Male						abhishek.jtechnologies@yopmail.com	Bandel			⋮
Afaque SMO	Male						afaque@yopmail.com	Topsia			⋮
Md Amjad Ansari	Male						muzammil@yopmail.com	Test Address			⋮
Md Muzammil Khan	Male						muzammil@yopmail.com	Test Address			⋮

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II.) TEMPORARY LIST: List of client that joined the organization for temporary period.

OPEN SHIFT

ADMIN

Scheduler

Staff

Clients

List

Temporary List

Archived

Documents Templates

New

Client Notes

Invoices

Reports

Shift Notes

Temporary Client List

Name	Gender	Age	NDIS	Recipient ID	Mobile	Phone	Email	Address	Type	Pricebook	Review
Sam Sundar SIL	Male						sam@yopmail.com	Behala			

Rows per page: 5
1-1 of 1

III) ARCHIVED :

OPEN SHIFT

ADMIN

Scheduler

Staff

Clients

List

Temporary List

Archived

Documents Templates

New

Client Notes

Invoices

Reports

Shift Notes

Account

Archived Staffs

Name	NDIS	Aged Care Recipient Id	Phone	Email	Address	Area
Sam Sundar SIL			4455778877	sam@yopmail.com	Behala	Demo Price Book

Rows per page: 5
1-1 of 1

IV) DOCUMENT TEMPLATE:

Document that are needed for client .

OPEN SHIFT

ADMIN

Scheduler

Staff

Clients

List

Temporary List

Archived

Documents Templates

New

Client Notes

Invoices

Reports

Shift Notes

Account

Documents

Add Document Sub-Category

Manage All

Community Nursing	▼
Staff & HR	▼
Behaviour Support	▼
Medication Management	▼
Governance	▼
Core	▼
Other	▼

V) New

OPEN SHIFT

ADMIN

Scheduler

Staff

Clients

List

Temporary List

Archived

Documents Templates

New

Client Notes

Invoices

Reports

Shift Notes

Account

Add New Client

Client detail

Name:

☒ Use Salutation

Select Salutation

Enter First Name

Enter Middle Name

Enter Last Name

Gender:

Select Gender

Date of Birth:

Address:

Enter Address

Unit/Apartment Number:

Enter Unit Number

Contact:

Enter Mobile Number

Enter Phone Number

Email:

Enter Email

Religion:

Enter Your Religion

Marital Status:

Select

Nationality:

Enter Your Nationality

VI) CLIENT NOTES: All the notes that are added for client by the staffs after every shift

OPEN SHIFT

ADMIN

Scheduler

Staff

Clients

Invoices

Reports

Shift Notes

Account

Add Note

Start date

End date

Filter Categories

Filter Participant

Filter Staff

12 Mar, 2025

OPEN SHIFT added Enquiry for Afaq SMO dated 12/03/2025

Test 1

Notes Test 1

24 Jan, 2025

OPEN SHIFT added Enquiry for Afaq SMO dated 24/01/2025

Test

Test

4) INVOICE

To generate Invoice for client

Invoice Steps

OPEN SHIFT

ADMIN

Scheduler

Staff

Clients

Invoices

List

List Void

Generate

Reports

Shift Notes

Account

Invoice List

Select Date

10/06/2025

Select End Date

10/11/2025

Select Client

All

Total Amount

1.1

Total Tax

0.1

Total Paid

0

Total Unpaid

1.1

Total Overdue

0

Invoice Number	Client	Amount	Tax	Balance	Status	Issued Date
INV-20251006-1-001	Abhishek Santra	1.1	0.1	1.1	GENERATED	06/10/2025

Client	Total Shifts	To	Purchase Order	Due At	Tax	Total Cost	Status
Abhishek Santra	3	View Report		10/06/2025		\$0	READY TO BE INVOICED
Afaq SMO	0	View Report		10/06/2025		\$0	READY TO BE INVOICED
Md Amjad Ansari	5	View Report		10/06/2025		\$0	READY TO BE INVOICED
Md Muzammil Khan	0	View Report		10/06/2025		\$0	READY TO BE INVOICED
Sam Sundar SIL	0	View Report		10/06/2025		\$0	READY TO BE INVOICED

5) REPORT:

Staff Document Report if any document is expired or any document is not added.

Staff Name	Test Sub Cat	Comprehensive Car Insurance	Car Registration	Drivers License International	Drivers License LR	Drivers License C
John Doe	-	-	-	-	-	-
Rajdeep Das	-	-	-	-	-	-
Mirnal	-	-	-	-	-	-
Rounak Manna	-	Valid	-	-	-	-
TEST 1	-	-	-	-	-	-

6) SHIFT NOTES: Notes added for client so that it can be used for reference in next shift by staff for the clients.

SHIFT NOTES STEPS

