

Create a shift

Add a shift for a client on the Rostering screen, with the day, times and notes, so it is ready to be assigned to a staff member.

WHO IT IS FOR Owner, Admin, Manager, Rostering Officer	TIME NEEDED About 4 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need permission to create shifts (Can create shift). To add invoice line items you also need Can edit shift, and to choose a person for a one-off shift you also need Can assign staff to shift. If a Heads up before assigning box appears, finishing from that box also needs Can edit shift. If you cannot see the Add shift button, ask an Owner or Admin to check your role.

Before you begin

- **Rostering** is in your left menu and **Add shift** is on the screen. They show for roles that include **Can view roster** and **Can create shift**. An Owner or Admin can add these permissions to a role in **Configuration > Roles & Permissions**. See Roles and permissions basics.
- You are signed in to BondiByte on a computer.
- The client is active and appears on the **Rostering** screen. That screen lists clients who are not attached to a site and do not have a standalone site of their own. It calls them simple clients, or community clients. Clients who live at a site, or have a standalone site, are rostered in **SIL/Smart Rostering** instead. See SIL roster basics. When no client is listed, the screen says **No simple clients yet.** and **Add shift** is greyed out.
- If you want to attach invoice line items, the client has an Active Service Agreement that covers the date of the shift, with line items on it. See Service Agreements.
- If you want to choose a person now, they are an active staff member who has finished onboarding. See Staff.



Steps

1 Go to Rostering > Add shift

- 1 In the left menu, choose **Rostering**. The calendar opens on the current week, with a row for each client.
- 2 To plan another week, choose a date in **Jump to date**, or use the arrow buttons beside it to move one week at a time. Choose **Today** to come back to the current week.
- 3 To add a shift on a particular day, choose the empty space in that day's column, in the client's row. The client and the day are filled in for you.
- 4 Or choose **Add shift** at the top right of the screen, then choose the client and the day in the window that opens.

Important: The **Rostering** screen lists active clients who are not attached to a site and do not have a standalone site of their own. A client who lives at a site, or has a standalone site, is rostered in **SIL/Smart Rostering**. See SIL roster basics. If you cannot find your client, see Troubleshooting below.

The screenshot displays the BondiByte Rostering interface. On the left, the 'Rostering' option is highlighted in the workspace navigation menu. The main panel shows a weekly calendar for the period 14 Dec to 20 Dec 2026. The 'Client' tab is active, and a date picker is set to 14/12/2026. The calendar grid lists clients, with 'Dan Mensah' (0.0 hrs) shown for Monday 14th. The empty space for Tuesday 15th is highlighted, indicating where to click to add a shift. The '+ Add shift' button is located in the top right corner of the calendar area.

Choose Rostering, the highlighted item in the left menu (1). Show the week you want (2), then choose the day in the client's row (3) or Add shift (4).



2 Choose the client, dates and times

- 1 In **Client**, check the client. If you started from a day in a client's row, the client is already chosen. If you started from **Add shift**, choose the client from the list.
- 2 In **Start date**, choose the day the shift starts.
- 3 In **End date**, check the day the shift finishes. It starts on the same day as the start date, so change it only for a shift that finishes after midnight. If you moved the start date earlier, change **End date** too, or the shift will run across several days.
- 4 In **Start time**, set the time the shift starts. It starts as 9:00 am.
- 5 In **End time**, set the time the shift finishes. It starts as 2:00 pm. The shift must finish after it starts.

Client: Required. The list holds the clients shown on the **Rostering** screen.

Start date: Required. If you started from **Add shift**, it starts as today.

End date: Required. It cannot be earlier than the start date.

Start time: Required.

End time: Required.

Add shift
Schedule a shift for a simple client.

Client
Dan Mensah

Start date
15/12/2026

End date
15/12/2026

Start time
09:00 AM

End time
02:00 PM

Client invoice line items
Used when generating client invoices for this shift.

Dan Mensah
Select line item
Hours
+ Add line item

Assigned staff
Unassigned

Check the client (1), then set the start date (2), end date (3), start time (4) and end time (5).



3 Add invoice line items, staff and notes if you need them

- 1 Under **Client invoice line items**, choose an item from the client's active Service Agreement if this shift is to be invoiced. **Hours** fills in with the length of the shift, and you can change it. To invoice more than one item for the shift, choose **+ Add line item**. Leave **Select line item** as it is if not.
- 2 In **Assigned staff**, leave **Unassigned** to choose someone later, or choose a person now. See [Assign staff to a shift](#).
- 3 In **Notes**, type anything the team should know about this shift.
- 4 In **Minimum shift notes required**, enter how many shift notes or reports the staff member must add for this shift. It starts as 0.

Client invoice line items: Optional. Links the shift to an item and hours on the client's active Service Agreement, so the shift can be used when client invoices are prepared. Each item in the list shows its name, its price and unit, and its support item code. If the client has no active agreement, the section says the client has no active service agreement, and the list is empty.

Hours: Optional, and only available once a line item is chosen. A number above 0. It starts as the length of the shift and you can change it. It is not updated if you change the shift times afterwards.

+ Add line item: Adds another line, so one shift can be invoiced against more than one item. **Remove** appears beside each line when there is more than one.

Assigned staff: Optional. Choose a person, or leave **Unassigned**.

Notes: Optional notes for this shift.

Minimum shift notes required: How many shift notes or reports staff must add for this shift. It starts as 0.

Note: If a **Heads up before assigning** box appears after you choose **Add shift**, the shift is already saved and the window now says **Edit shift**. The confirmation then says **Shift updated**. instead of **Shift added**. See [Assign staff to a shift](#).



Client invoice line items

Used when generating client invoices for this shift.

Dan Mensah

1

Select line item

▼

Hours

+ Add line item

2

Assigned staff

Unassigned

▼

3

Notes

Example shift for the BondiByte guides.

4

Minimum shift notes required

0

How many shift notes/reports staff must add for this shift.

☐ Repeat this shift

Cancel

Add shift

Choose an invoice line item if you need one (1), choose who is assigned (2), type any notes (3) and set the minimum shift notes (4).



4 Repeat the shift if it happens regularly

- 1 Tick **Repeat this shift**. The **Repeat setup** options appear.
- 2 In **Repeat type**, choose **Daily** or **Weekly**.
- 3 For **Daily**, choose how often in **Repeat every**: 1, 2, 3 or 7 days. For **Weekly**, tick the days of the week in **Week days**.
- 4 Choose when the series stops. Enter a date in **Repeat end date**, or tick **Use repeat count** and enter how many shifts to create in **Repeat count**.

Repeat this shift: Tick box, not ticked to start with. Ticking it shows the **Repeat setup** options and changes the button at the bottom to **Add shifts**.

Repeat type: Daily repeats every few days. **Weekly** repeats on the days of the week you tick. It starts as **Daily**.

Repeat every: Shown for **Daily**. Choose 1 day, 2 days, 3 days or 7 days. It starts as 1 day.

Week days: Shown for **Weekly**. Tick one or more days, from Mon to Sun. When you choose **Weekly**, the day of your start date is ticked for you.

Use repeat count: Tick box. When ticked, the series ends after a number of shifts instead of on a date.

Repeat count: Shown when **Use repeat count** is ticked. How many shifts to create, from 1 to 370. It starts as 3.

Repeat end date: Shown when **Use repeat count** is not ticked. The last day the series can run. It starts 13 days after the start date and cannot be earlier than the start date.

Note: Skip this step for a one-off shift. When **Repeat this shift** is ticked, the button at the bottom of the window reads **Add shifts**, and every shift in the series is created in one go.

Tip: For a repeating shift, leave **Assigned staff** as **Unassigned**, then assign each shift from the calendar. BondiByte shows the **Heads up before assigning** notes for each shift you assign one at a time.



Unassigned

Notes

Example shift for the BondiByte guides.

Minimum shift notes required

0

How many shift notes/reports staff must add for this shift.

☒ Repeat this shift 1

REPEAT SETUP

Repeat type 2

Daily Use repeat count

Repeat every 3

1 day

Repeat end date 4

28/12/2026

Cancel Add shifts

Tick Repeat this shift (1), choose Daily or Weekly (2), choose how often (3) and when the series ends (4).

5 Choose Add shift

- 1 Check the details you entered. The buttons at the bottom of the window stay in view as you scroll.
- 2 Choose **Add shift**. Choose **Cancel** instead to close the window without saving.

Minimum shift notes required

0

How many shift notes/reports staff must add for this shift.

☐ Repeat this shift

1

2 Cancel Add shift

Choose Add shift (1) to save, or Cancel (2) to close the window without saving.



6 Check the new shift

- 1 A message confirms **Shift added**. For a repeat series it says **Added** with the number of shifts, for example **Added 3 shifts**. If you went through the **Heads up before assigning** box, it says **Shift updated**. instead.
- 2 The window closes and the shift appears on the calendar, in the client's row on the day you chose. A shift with nobody assigned is amber and shows **Assign staff**.

The screenshot shows the 'Rostering' interface. At the top right, a confirmation message box (1) says 'Shift added.' Below the message box, the interface has a header with filters: 'Staff', 'Client', 'All shifts', 'Today', '14/12/2026', and a date range '14 Dec - 20 Dec 2026'. There are also buttons for 'Include SIL clients', 'Weekly', 'Publish', and '+ Add shift'. Below the header is a calendar grid. The grid has columns for days of the week (MON 14, TUE 15, WED 16, THU 17, FRI 18, SAT 19, SUN 20). The first row is for 'Dan Mensah' (DM) with a duration of '5.0 hrs'. On Tuesday (TUE 15), a new shift is added, highlighted with a blue box (2). The shift is labeled '9am - 2pm' and '+ Assign staff'. Below the shift is a '+ Add' button.

The confirmation message (1) and the new shift on the calendar (2).

What happens next

The shift is now on the calendar. Until someone is assigned it shows **Assign staff** in the client's row, and it sits in the **Vacant shift** row of the **Staff** view. Choose it at any time to change it, assign a staff member or delete it. See [Edit a shift](#), [Assign staff to a shift](#) and [Delete a shift](#) or replace the worker.

A shift becomes visible to a staff member once they are assigned to it. Adding a shift with nobody assigned does not notify anyone. If you chose a person in **Assigned staff**, they get a notification in BondiByte that a shift has been assigned to them. To email assigned staff their shifts, see [Publish a roster](#).

Important notes

Important: A shift takes one staff member. To roster a second worker for the same client at the same time, add a second shift.

Good practice

- Choose the **Client invoice line items** as you add the shift and check **Hours**. **Hours** does not change if you edit the times later.
- For a shift that finishes after midnight, change **End date** as well as **End time**, or you will see **The shift must end after it starts**.
- For a regular shift, use **Repeat this shift**, leave **Assigned staff** as **Unassigned** and assign each shift afterwards, so you can see whether each person is free.



Troubleshooting

I cannot see **Rostering** in the left menu.

Why it happens: Your role does not include **Can view roster**.

What to do: Ask an Owner or Admin to add the permission to your role in **Configuration > Roles & Permissions**.

I cannot find the client I want to roster.

Why it happens: The **Rostering** screen lists active clients who are not attached to a site and do not have a standalone site of their own. A client who lives at a site, or has a standalone site, is rostered in **SIL/Smart Rostering**.

What to do: Roster the client in **SIL/Smart Rostering**. If the client should be on the **Rostering** screen, ask an Owner or Admin to check their record in **Clients**.

The screen says **No community clients in your scope**.

Why it happens: Your access is limited to certain sites, and the **Rostering** screen schedules clients who are not attached to a site.

What to do: Ask an Owner or Admin if you need access to these clients.

I cannot see **Add shift**.

Why it happens: Your role does not include **Can create shift**.

What to do: Ask an Owner or Admin to check your role, or to add the shift for you.

Add shift is greyed out, and the screen says **No simple clients yet**.

Why it happens: No active client is listed on the **Rostering** screen. It lists active clients who are not attached to a site and do not have a standalone site of their own.

What to do: Add the client, or check that the client's record is active in **Clients**. A client who lives at a site is rostered in **SIL/Smart Rostering**.

Under **Client invoice line items** the list is empty, or the section says the client has no active service agreement.

Why it happens: The client has no Active Service Agreement that covers the date of the shift, or the agreement has no line items.

What to do: Check the client's agreement in **Service Agreements**, or choose a **Start date** that falls inside the agreement. You can leave the line item empty now and add it later by opening the shift. See **Edit a shift**.

A message says **The shift must end after it starts**.

Why it happens: The end date and time are not later than the start date and time.

What to do: Correct **End date** and **End time**, then choose **Add shift** again.

A message says **Choose a repeat end date for the series. or Enter how many shifts to create**.

Why it happens: **Repeat this shift** is ticked but the series has no end.

What to do: Enter a **Repeat end date**, or tick **Use repeat count** and enter a number in **Repeat count**. Untick **Repeat this shift** if you only want one shift.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
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