



Retail Staff Shift Handover & Communication Checklist 2026

Shift Summary & Personnel Overview

Record of outgoing/incoming staff, total headcount, and any staff absences or late arrivals.

Shift Date

Shift Start Time

Outgoing Supervisor Name

Incoming Supervisor Name

Total Number of Staff on Shift

Enter a number...

Staffing Status

- ☐ All shifts fully covered
- ☐ Short-staffed (Call-outs)
- ☐ Overtime required
- ☐ Agency/Temp staff present

Personnel Notes & Handover Notes

Write something...

Sales Performance & KPI Review

Review of sales targets achieved, transaction counts, and average transaction value (ATV) for the completed shift.

Shift Date

Enter date...

Shift End Time

Enter time...

Total Sales Revenue Achieved

Enter a number...

Total Number of Transactions

Enter a number...

Average Transaction Value (ATV)

Enter a number...

Sales Target Met?

- ☐ Target Met
- ☐ Below Target
- ☐ Exceeded Target

Performance Notes & Variance Explanations

Write something...

Cash Management & Till Reconciliation

Verification of register balances, float amounts, processed refunds, and any identified cash discrepancies.

Reconciliation Date

Enter date...

Shift End Time

Enter time...

Opening Float Amount

Enter a number...

Total Cash Sales Recorded

Enter a number...

Actual Cash in Drawer

Enter a number...

Cash Discrepancy (Over/Short)

Enter a number...

Payment Method Breakdown

- ☐ Cash
- ☐ Credit/Debit Card
- ☐ Mobile Pay (Apple/Google Pay)
- ☐ Gift Cards
- ☐ Store Credit

Discrepancy Explanation/Notes

Write something...

Upload Cash Count Slip/Z-Report

 Upload File

Manager Verification

Inventory & Stock Updates

Reporting on high-velocity items sold out, new deliveries received, and any damaged or missing stock noted.

Inventory Audit Date

Enter date...

Total Units Received Today

Enter a number...

Stock Discrepancy Types

- ☐ Damaged Goods
- ☐ Missing/Shrinkage
- ☐ Expired/Out of Date
- ☐ Incorrect Labeling

Details of Stock Discrepancies

Write something...

Delivery Note/Invoice Photo

 Upload File

Stock Level Status

- ☐ All levels adequate
- ☐ Low stock on key items
- ☐ Critical shortage alert

Store Maintenance & Cleanliness Status

Assessment of floor cleanliness, fitting room tidiness, and completion of scheduled cleaning tasks.

Completed Cleaning Zones

- ☐ Sales Floor
- ☐ Fitting Rooms
- ☐ Cash Wrap/Registers
- ☐ Stockroom
- ☐ Restrooms
- ☐ Entrance & Window Displays

Overall Store Cleanliness Rating

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Poor

Cleaning Discrepancies or Maintenance Issues

Write something...

Cleanliness Inspection Photo Proof

 Upload File

Last Cleaning Cycle Completion Time

Enter time...

Customer Service & Incident Reporting

Documentation of significant customer interactions, complaints, feedback, or any security/safety incidents.

Incident Date

Enter date...

Time of Incident

Enter time...

Incident Category

- ☐ Customer Complaint
- ☐ Product Defect/Return
- ☐ Staff Incident
- ☐ Security/Theft Issue
- ☐ Safety/Slip & Fall
- ☐ Other

Incident Description

Write something...

Staff Involved

- ☐ Sales Associate
- ☐ Store Manager
- ☐ Stockroom Staff
- ☐ Security Personnel

Incident Photo or CCTV Screenshot

 Upload File

Manager Acknowledgment

Merchandising & Visual Standards

Notes on replenishment needs, replenishment of promotional signage, and maintenance of window displays.

Merchandising Tasks Completed

- ☐ Restocked depleted shelves
- ☐ Updated promotional signage
- ☐ Straightened apparel/hangers
- ☐ Cleaned display glass/cases
- ☐ Replenished mannequin outfits

Missing Signage or Labels

Write something...

Visual Merchandising Issues/Notes

Write something...

Display Area Photo Documentation

 Upload File

Display Integrity Status

- ☐ All displays compliant with planogram
- ☐ Minor deviations noted
- ☐ Urgent corrective action required

Task Completion & Pending Actions

List of unfinished tasks from the previous shift and priority items requiring immediate attention for the incoming team.

Completed Tasks

- ☐ Store Opening Routine
- ☐ Daily Cleaning Schedule
- ☐ Cash Drawer Reconciliation
- ☐ Inventory Restocking
- ☐ Price Tag Updates

Unfinished Tasks & Pending Items

Write something...

Priority Level for Pending Tasks

Write something...

Task Deadline/Follow-up Date

Enter date...

Outgoing Supervisor Verification

Facility & Equipment Status

Check of POS functionality, handheld scanner status, and any lighting or temperature issues needing maintenance.

Equipment Functionality Check

- ☐ POS Terminals
- ☐ Barcode Scanners
- ☐ Card Readers/Payment Terminals
- ☐ Digital Signage/Displays
- ☐ Handheld Inventory Devices
- ☐ Store Music/Audio System

Store Temperature Status

- ☐ Optimal
- ☐ Too Cold
- ☐ Too Warm
- ☐ Action Required

Equipment Malfunction Details

Write something...

Last Maintenance Check Date

Enter date...

Technician or Supervisor Verification

Handover Sign-off

Formal acknowledgement and signatures from both the outgoing and incoming Shift Leads/Managers.

Handover Date

Enter date...

Outgoing Manager Signature

Incoming Manager Signature

Handover Status

- ☐ Complete & Smooth
- ☐ Complete with Pending Issues
- ☐ Urgent Attention Required

Additional Handover Notes

Write something...

< Previous

> Next

✓ Finish

🔗 Generate Sample Report