

## ExpandShare Integration — Client Guide

### Integration Overview:

The integration connects your employee management source of truth (Restaurant365, 7shifts, Homebase, Push, Toast, Merge) with ExpandShare. Active employees flow in and out of ExpandShare automatically based on their active status in your integration source.

### Integration Access by Subscription Level:

- Restaurant365 → Included with all subscription levels.
- 7shifts, Homebase, Merge, Push → Available with Pro.
- Toast → Available with Premium.

**R365 data requirements:** First Name, Last Name, Email Address, and Job Code must be present for each employee record. Some R365 accounts may need cleanup before integration can succeed.

### Getting Started with your Integration:

**Step 1:** Update ExpandShare Roles.

**Step 2:** Complete pre-authorization (only if using 7shifts or Homebase). Do this before emailing the integrations team.

**Step 3:** Gather your details:

**Full Name**

**Company Name**

**Restaurant365 Instance Address (your R365 login page, if applicable)**

**Number of Locations**

**Integration Source: R365, 7shifts, Homebase, Push, Toast, or Merge**

**Integration Source Authorized: Yes/No**

**ES Roles Updated: Yes/No**

#### Pre-Authorization — 7shifts and Homebase only

##### 7shifts

Open: <https://usersync.prod.expandshare.com/7shifts/authorize>

Sign in to 7shifts when prompted and authorize ExpandShare access.

##### Homebase

Go to: <https://app.joinhomebase.com/settings/api>

Request an API Key on the API Settings page in Homebase, Copy into Email Template.

## Send the Integration Request Email

**Step 4:** Email the R365 Support Team to begin process.

To: [integrations@restaurant365.com](mailto:integrations@restaurant365.com)

**Subject:** ExpandShare Integration

**CC: Your Onboarding Coach (if still in implementation) or your CSM (if you are live)**

Hello Support Team,

I am reaching out to begin the process for an ExpandShare Integration. Here are my details:

**Full Name:**

**Company Name:**

**Restaurant365 Instance Address (your r365 login page if you have one):**

**Number of Locations:**

**Integration Source: (R365, 7shifts, Homebase, Push, Toast, Merge)**

**Integration Source Authorized/API Provided: (Yes/No)**

**ES Roles Updated: (Yes/No)**

Thank you,

## Role Mapping, Confirmation, and Go Live

**Step 5:** Complete Role Mapping Workbook and Schedule Go Live with Support Team

After your request is received, **the Support Team** will send a **Role Mapping Workbook**. In this sheet, connect the roles listed in Column B (from your source system) to the corresponding ExpandShare Roles in Column G. Please OMIT any roles you do not wish to integrate over into ExpandShare.

This process begins a 30-day window to set up, schedule, and go live with your integration.

Once your mappings are complete, reply to the Support Team with your intended Go-Live date.

**Notes: “Go-Live” for your integration means that employees will begin receiving invitation emails to join ExpandShare. Training content still needs to be created or assigned separately after the integration is live.**

**All requests exceeding 30 days will be cancelled, and the process will need to begin again.**