



flowtify

From paper to platform – How to digitize your existing QM system.

A guide for QM departments with established structures and a need for greater transparency, controllability, and efficiency.



1. INTRODUCTION - WHY THIS DOCUMENT?	3
2. FROM INDIVIDUAL LISTS TO SYSTEM LOGIC - THE BIG MISTAKE IN THINKING	3
3. HOW YOUR FLOWTIFY STRUCTURE WORKS	4
🎯 STEP 1: AREA TEMPLATE - WHERE THE ACTIVITY TAKES PLACE?	4
🕒 STEP 2: TIMING - WHEN SHOULD THE CHECKLIST APPEAR??	4
📌 STEP 3: TASK TEMPLATES - WHAT EXACTLY NEEDS TO BE DONE	4
4. STANDARDIZATION + INDIVIDUALIZATION	5
🔄 A COMMON LANGUAGE FOR A FLEXIBLE APPROACH	5
🔒 LOCK LOGIC = YOUR KEY	5
🧠 INDIVIDUALIZATION WITHOUT LOSS OF CONTROL	5
📊 COMPARABILITY = EVALUABILITY	5
5. CHECKLIST TEMPLATES AS STRUCTURED WORKFLOWS	5
🔄 FROM TASK COLLECTION TO PROCESS LOGIC	5
📖 CLARITY & EFFICIENCY FOR YOUR QS	6
6. SIMPLIFICATION THROUGH REUSE	6
🔄 DEFINE ONCE, USE MULTIPLE TIMES	6
🧩 MODULAR COMPONENTS INSTEAD OF CUSTOM-MADE PRODUCTS	7
7. LABELS AND FILTERS	7
🏷️ LABELS AS AN ORGANIZING PRINCIPLE	7
🔍 LABELS FOR TARGETED EVALUATIONS	7
8. ANSWER OPTIONS – QUICK JUSTIFICATIONS INSTEAD OF LONG FREE-TEXT ENTRIES	8
📦 FLOWTIFY HACCP	8
🔗 FLOWTIFY IoT	8
9. NAMING LOGIC FOR TEMPLATES	8
🔄 WHY NAMING LOGIC IS IMPORTANT	8
🎯 AREA TEMPLATES - YOU SET THE FRAMEWORK	9
📁 CHECKLIST TEMPLATES - STRUCTURE WITH A SYSTEM	9
📋 TASK TEMPLATES – THE “ACTIVITY: OBJECT” NAMING CONVENTION	9
10. FROM THEORY TO IMPLEMENTATION	9
🔄 USE WHAT YOU ALREADY HAVE	9
🔪 FEWER SIGNATURES - MORE STRUCTURE	10
📦 FAVOR A FEW TEMPLATES - CLEVERLY USED	10
11. YOUR VIEW OF THE BIG PICTURE	10
📊 WHAT BECOMES VISIBLE WHEN YOU DIGITIZE?	10
🕒 STRUCTURED TEMPLATES = MEASURABLE QUALITY	11
🔧 TAKING RESPONSIBILITY - WITHOUT DOING EVERYTHING YOURSELF	11
12. TYPICAL TRIPPING HAZARDS AND HOW YOU CAN AVOID THEM:	11
❌ <i>Too Many Exceptions in Mind</i>	11
❌ <i>More Is More? - "I'll just create 40 checklists – then everything's covered."</i>	11
❌ <i>Everyone Names Things Their Own Way - "Let each location name their checklists however they want."</i>	11
❌ <i>Signatures Out of Habit</i>	11
13. NOW IT'S YOUR TURN 🚀 - GET OFF TO A STRUCTURED START - AND THINK BIG!	12

1. Introduction - Why this document?

As the central QM manager, you are responsible for a self-monitoring system that has to function reliably in a wide variety of businesses - from commercial kitchens with several thousand meals a day to municipal hospital kitchens and cafés in retirement homes.

Self-monitoring systems naturally have many operational similarities: the same hygiene requirements, comparable processes and identical legal bases. In practice, however, these are often documented using a large number of individually created forms and work orders - with high maintenance and updating costs for you and a lack of comparability between companies.

The introduction of flowtify is more than just a switch from paper to app. It is an opportunity to transfer a proven system into a modern, structured platform that creates transparency for everyone involved, simplifies processes and at the same time leaves room for individual adjustments - where they are really necessary.

Because while paper-based documentation often focuses on the differences between the individual locations, flowtify is about recognizing the similarities - and developing reusable standards from them.

What works the same in two or more operations is already a stable foundation for your digital structure.

You define central tasks and specifications at company level - for example for cleaning, temperature checks or incoming goods - and enable meaningful, context-related individualization on site.

With the right structure, you can do just that: you can create maximum transparency with a manageable number of standards - without having to know every detail on site. This document shows you how to do this. With concrete examples, clear principles and a structure that can be seamlessly integrated into your day-to-day QM activities.

1.1 A common misconception: "Our companies are too different"

Perhaps you know the idea - or have already formulated it yourself:

"It sounds good in theory, but it's hardly possible for us: we have kitchens in old buildings with renovation delays, ultra-modern new buildings, customer kitchens with rental equipment and our own operations that we have completely fitted out ourselves. How am I supposed to work to the same standards?"

A valid thought - but also one that overlooks the crucial point:

flowtify does not map real properties, but processes.

- A combi-steamer - old or new - must be cleaned according to the manufacturer's instructions.
- A floor drain must be cleaned, no matter how old the pipes behind it are.
- A freezer cell must reach -18 °C, regardless of who owns it.

The decisive factor is therefore not where something is located or who owns it, but whether a certain process has to take place in that location. And this is precisely where flowtify comes in: with central specifications for standardized processes - and targeted options for local adaptation.

2. From individual lists to system logic - the big mistake in thinking

Imagine you want to document the daily cleaning of the combi-steamers as part of the "Kitchen | End of work" checklist. What would you have done so in the past? You would probably have created a central form - entitled "After-work cleaning of the kitchen" - and sent it to all operations. In the hope that each person responsible would adapt the task of cleaning the combi-steamers on their own.

What you don't know is whether this will happen at all. Whether the task has been canceled because there is no combi-steamer on site - or whether nothing is being documented at all. The earliest you will find out is during an internal audit or, in the worst case, if an inspection by the food safety authorities results in a fine.

The mistake: digitizing without systematizing.

In the world of forms, it is customary to treat each location as a special case. But flowtify follows a different principle: Reusable templates for tasks that are identical in many companies - and can be flexibly adapted there.

 Old logic vs. flowtify logic:

Paper-based logic	flowtify logic
Location = own list	Central template for many companies
Tasks recorded multiple times	Tasks are defined once
No insight into local changes	Central control & comparability
Maintenance effort per location	Maintenance at company level

3. How your flowtify structure works

flowtify thinks from big to small - and always in templates that can be maintained centrally, used company-wide and supplemented locally.

Three elements interlock:

1. area templates
2. checklist templates
3. task templates

This structure forms the stable backbone for your digital self-monitoring - standardized, comparable, but still flexible.

 Step 1: Area template - where the activity takes place?

Each checklist template is first assigned to an area template - e.g. "Kitchen", "Scullery" or "Cold kitchen". This allows you to determine the operational context in which the content is used.

The more universally you name your areas, the less often you have to make adjustments on site - and the easier it is to filter and compare reports later on.

 Use the lock symbol to specify:

- **Closed lock:** The area is fixed and cannot be changed by the company.
- **Open lock:** The company can determine the assignment itself or keep the checklist without an area.

 Step 2: Timing - When should the checklist appear??

In the checklist template, you define when and at what frequency it should be executed - e.g. daily, weekly, monthly or at user-defined intervals.

 Here, too, you control by lock:

- **Closed lock:** Die Zeitplanung ist fix und unternehmensweit einheitlich.
- **Open lock:** Der Betrieb passt die Startzeit, Häufigkeit oder Wochentage selbst an.

A fixed time period is particularly helpful for infrequent tasks such as monthly checks. Division managers can see at a glance whether companies have already completed a certain task - and can take countermeasures at an early stage.

 Step 3: Task templates - What exactly needs to be done

The task templates form the heart of your checklist templates. This is where you define:

- **What should be documented**
- **What the task is called**
- **What form of confirmation is expected**

Example:

Your task is called "Cleaning: Combi steamer". A location adds "top/bottom" on site without changing your template.

 If you have set a task lock:

- Title, description, labels and confirmation logic are retained.
- The operation may add, but not delete.

This means that your central specification is retained - but can be expanded as required.

4. Standardization + individualization

Not a contradiction - but the perfect combination

One of the most common fears when introducing a centralized system: “Then everyone has to do the same thing - that will never work for us!” But the exact opposite is the case: standardization is the prerequisite for individualization to take place in a controlled and meaningful way.

A common language for a flexible approach

Central templates for tasks, checklists and areas create reliability.

Everyone knows:

- **Which tasks must be fulfilled**
- **What they are called**
- **Which confirmations are expected**

Then - and only then - is targeted adaptation possible on site.

Lock logic = your key

Using the lock, you determine where customization is allowed at location level and where it is not:

- **Checklist lock: fixes certain setting options in checklist templates**
- **Task lock: protects title, description, labels and confirmation form**

Result: You set the framework - operations shape it on their own responsibility.

Individualization without loss of control

As the person responsible for QM, flowtify allows you to maintain an overview at all times:

- **What applies globally?**
- **What has been added locally?**
- **Where do variations emerge - and why?**

Comparability = evaluability

What is named, labeled and assigned globally can also be evaluated company wide.

Example:

The “Temperature: Freezer” task is the same everywhere - even if there are local additions such as “Temperature: Freezer – Walk In”. The data remains comparable.

Conclusion: flowtify combines structure with freedom.

- **You define standards - clearly & comprehensibly**
- **You control adjustments with locks**
- **You maintain control - even with individual specifications**

The result: A system that thinks ahead.

5. Checklist templates as structured workflows

Checklist templates in flowtify are not just digital forms - they represent structured processes that are repeatable, evaluable and auditable.

From task collection to process logic

Example:

The template “Goods receipt | Control | Weekly” contains:

1. visual inspection: driver & vehicle
2. temperature check: frozen goods
3. inspection: sensory condition of the product

These tasks can be reused as often as required in other checklists. Result: A central, well thought-out process library.

Clarity & efficiency for your QS

As a QM, you no longer work with individual lists, but with reusable structures:

- Kitchen | Cleaning | Closing time
- Incoming goods | Checking | Weekly
- Warehouse | Basic cleaning | Monthly

You control the area, schedule and customization options globally.

Dynamic Tasks for Flexible Workflows

Not every task in a checklist has to be mandatory – sometimes, simply displaying a task is already a meaningful signal.

Example 1: Flexible Incoming Goods Checks

A classic use case is the incoming goods process when deliveries vary in content. One site may regularly receive products from a supplier delivering both frozen and fresh goods, with target temperatures of 2 °C, 4 °C, or 7 °C. But: not every temperature zone is relevant with every delivery.

In such cases, tasks can be configured in the “Advanced Settings” so they appear in the checklist but automatically disappear after the checklist expires – if they weren’t completed. They behave as if they were never part of the checklist. However, if a task is completed, it is documented like any other.

This option enables a realistic representation of actual workflows – without forcing unnecessary completion of every possible question. That said, in documentation-relevant processes like incoming goods checks, it’s still advisable to include at least one required task – such as:

“Delivery received”, “No delivery received”, or “Night delivery – visual check not possible”.

This ensures proof that the checklist was consciously reviewed, even if no specific delivery occurred.

Example 2: Process Overview as Visual Reminder

A different use case involves checklists that are not mandatory for documentation, but serve purely as informational guides – like process plans.

For example, a breakfast buffet might be prepared for 50 guests on weekdays, 80 on Saturdays, and 150 on Sundays. If staff rotate across days, there’s a risk of accidentally applying the wrong preparation rhythm – e.g. using the Saturday routine on a Sunday.

Instead of requiring formal documentation, **different checklists** can be created for each scenario, with guidance on the expected number of guests. Tasks are displayed optionally – **for orientation only. No confirmation or completion is required** – just a quick glance at the plan.

Especially for process plans or recurring workflows with changing requirements, this type of interactive reminder logic can be extremely useful – without increasing the documentation burden.

Conclusion: More Than Just Required Fields

This dynamic task logic offers possibilities that paper checklists never could:

- It adapts flexibly to real-life workflows
- It provides targeted guidance without documentation pressure
- It increases process safety through visibility instead of obligation

flowtify becomes a true daily companion – for both compliance and orientation.

6. Simplification through reuse

One of flowtify's goals: Not creating everything from scratch - but working with templates.

Define once, use multiple times

The template “Cleaning: Combi steamer” you can:

- - use in different checklists
- - combine with different areas & schedules
- - use across all locations

Modular components instead of custom-made products

Centralized maintenance = less effort. Changes to task templates take effect immediately & everywhere.

It's different with checklists - here you use:

- - **Mandatory publication**
→ Is transferred immediately & fixed, adjustment only possible within permitted parameters
- - **Optional publication**
→ Can be set up or skipped as desired

This is how you decide where standards are mandatory and where flexibility makes sense.

Conclusion: Reuse is not a trick - it's a systematic approach.

- You define once - and use systematically
- You save time & reduce maintenance effort
- You retain control over changes

The more consistently you use templates, the easier your day-to-day QM work will be.

7. Labels and filters

Why structure creates visibility

The larger your system becomes, the more important targeted orientation becomes. Labels can help you here - small helpers with a big impact.

Labels as an organizing principle

Each task template can be provided with one or more labels, e.g.:

- Cleaning
- CCP 1
- Incoming goods
- Basic cleaning

Labels are freely selectable - align them with your existing QM structure.

Tip: For labels, **think across the board**, not location-specific!

Example:

The task „Cleaning: Work surfaces“ can appear in any checklist - the label ‘kitchen’ would be too narrow compared to “cleaning”.

Labels for targeted evaluations

Labels make content filterable at different levels:

- In your dashboard
- In reports
- In the evaluation of fulfillment rates

Examples:

- Display all CCP tasks in the “Kitchen” area or across all areas
- Analyze all tasks with the incoming goods label
- Compare fulfillment rates for basic cleaning label

The clearer your label structure, the clearer your view of reality.

Conclusion: Labels are not a mandatory field - but a real lever for transparency:

- Structure tasks
- Facilitate evaluations
- Create an overview of risks & processes

A solid label system makes your flowtify system evaluable & future-proof.

8. Answer Options – Quick Justifications Instead of Long Free-Text Entries

You can manage answer options in the location overview under **Organization**. They help your teams document recurring situations cleanly without typing free text. These options are available in both the app and the dashboard, ensuring consistent and structured justifications.

flowtify HACCP

You can create answer options for:

- **HACCP event section:** e.g., “Expired,” “Failed,” “Deviating”
- **Failed tasks:** reasons selected via the purple button in the app
- **Deviating target values:** short explanations when results fall outside expectations
- **Deactivation:** why a task or checklist cannot be carried out temporarily

Especially helpful: “Auto-resolve.” If enabled, selected answers are immediately marked as resolved. They no longer appear in the event section but remain fully filterable and included in the analytics. This reduces noise and helps managers focus on what truly needs follow-up.

Typical examples:

- “No delivery”
- “Temporarily out of service”
- “Area closed”

Important: Answers such as:

- “Defect”
- “Technician required”
- “Missing material”

→ **never** resolve automatically – active follow-up is required here.

flowtify IoT

For IoT, answer options are used to:

- Resolve warning and status notifications
- Add quick comments to manual measurements

 **Summary:** Answer options reduce typing effort, provide clear and consistent justifications, and ease the workload for managers — without losing any operational information.

9. Naming logic for templates

Whether it's an area, checklist or task template: a clear name is the first step towards a comprehensible system.

Why naming logic is important

With a clear naming convention, you can achieve:

- Recognizability
- Quick findability
- Uniform orientation - across all locations

Good naming is like a language that everyone in the company understands in the same way.

Area templates - you set the framework

Define central, functional areas - neither too general nor too specific.

Examples:

- Production kitchen
- Scullery
- Coffee kitchen
- Warehouse

You control the naming globally - fine adjustments can be made locally if necessary (depending on the lock status).

Checklist templates - structure with a system

Proven naming pattern: **Who | What | When**

Examples:

- Kitchen management | Cleaning | Daily
- Scullery | Basic cleaning | Weekly
- Warehouse clerk | Incoming goods | On delivery

 **For variants: Add a concept abbreviation as the 4th element → “Kitchen | Cleaning | Weekly | BK”**

Notes on installation

The “Notes on setup” field is only visible internally. Use it to differentiate between similar templates - e.g. by:

- **Concept** (e.g. canteen kitchen)
- **Version** (e.g. 2025-01)

Makes your structure internally filterable & comprehensible.

Task templates – The “Activity: Object” naming convention

Examples:

- Cleaning: Combi steamer
- Inspection: Incoming goods
- Wiping: Tile backsplash

The advantage: Easy to expand locally - e.g. “Inspection: Incoming goods – **John Doe**”

Conclusion: You can recognize templates by their name.

- Standardized structures = scalable system
- You define terms centrally
- Employees find their way around more quickly

Clarity in the name = clarity in the system

10. From theory to implementation

Start with a stable base. Choose a pilot site that you know well. Start with:

- Areas that occur frequently in the pilot site, but also in other locations
- Processes that are the same in many companies
- HACCP-relevant tasks (e.g. temperature checks)

You don't have to digitize everything at once - the rest follows step by step.

Use what you already have

Your current HACCP system contains:

- Work instructions

- Forms
- Control plans

You can now structure this content as templates. Ask yourself for each task: Is it generic enough for several operations? → If not: **Optimize it!**

👉 **Fewer signatures - more structure**

Ask yourself:

- **Do I need a signature** for each single tasks?
- **Is a collective signature** at the end of the checklist **sufficient**?

Every superfluous signature costs time - multiplied by many tasks, this becomes noticeable.

📦 **Favor a few templates - cleverly used**

Less is more: create a few, well-structured templates with clear naming & lock logic.

Checklist e.g. "Kitchen | Cleaning | Closing time":

- Can it be adapted for use in other companies?
- Is the structure flexible without losing your central concept?

📌 **Practical Example**

Checklist: *"Kitchen | Cleaning | End of Shift"*

Includes:

- **Cleaning: Combi steamer** (with YES/NO + photo, mandatory)
- **Control: Waste disposal** (YES/NO)
- **Cleaning: Floors** (deselected, as this is handled by an external service provider)

If this template is used in 40 kitchens, a single change to the template is enough – it will apply everywhere immediately.

🎯 **Conclusion: Checklists = Workflows That Create Clarity**

- Create once – reuse across locations
- Structure processes – instead of managing isolated lists
- Combine standards with local realities

Less effort. More control.

📖 **Important tip at the end:**

Think in terms of recurring processes - not exceptions. If two or more companies have the same process - that is a template.

🎯 **Conclusion: With flowtify, you can make your existing system:**

- structure clearly
- digitize
- make it usable across locations

And best of all, you can decide for yourself how much standardization really makes sense. Start small - but with a plan. Step by step to a digital structure.

11. Your view of the big picture

Evaluations & responsibility

flowtify is more than just a digital form - it's your tool for a real overview. **In real time. Without paper. Without a guessing game.**

📊 **What becomes visible when you digitize?**

Thanks to templates, labels and lock logic, you can always see:

- Which tasks are completed where & how often
- Where key requirements have not been implemented
- Which processes are stable or conspicuous

You steer purposefully - instead of guessing.

 **Structured templates = measurable quality**

If all companies work with the same templates (possibly adapted within the framework of your lock logic), then quality:

- **comparable**
- **repeatable**
- **controllable**

You will see:

- Was the task completed?
- When & by whom?
- With what proof?
- Was it configured correctly?

This creates real traceability - for you, for audits, for authorities.

 **Taking responsibility - without doing everything yourself**

You don't need to know every store by heart. You just need a system that tells you what is working - and what is not & where!

- Central specifications
- Real-time evaluations
- Clearly defined control parameters

When something goes wrong? Then you intervene - **not by intuition, but by validation.**

 **Conclusion: Documentation is not an end in itself - but your tool for control.**

With flowtify, documentation:

- **efficient** - thanks to central templates
- **safe** - through systematic control
- **transparent** - for you & your team

You don't have to be everywhere - you just have to know what counts.

12. Typical tripping hazards and how you can avoid them:

Even a logical system can fail - when old thinking errors live on.

Here are the most common stumbling blocks - and how you can cleverly avoid them:

 **Too Many Exceptions in Mind** - *"But in location X it's different..."*

 **Better: Start with what's the same.** Use lock logic to manage the differences.

 **More Is More?** - *"I'll just create 40 checklists – then everything's covered."*

 **Better: Fewer, well-structured templates** - Reusable and flexibly controlled.

 **Everyone Names Things Their Own Way** - *"Let each location name their checklists however they want."*

 **Better: You define consistent terminology.** That ensures comparability and evaluability.

 **Signatures Out of Habit** - *"We sign off every task – that's how we've always done it."*

 **Better: Only require signatures where truly necessary.** Often a single summary signature – or none – is enough.

 **Conclusion:**

- Mistakes don't happen in the system - but in the thinking beforehand.
- Those who think in terms of standards can individualize sensibly.

- Those who pay attention to evaluability actively control - instead of just documenting.

13. Now it's your turn 🚀 - Get off to a structured start - and think big!

You now have the know-how to turn your existing system into a central, scalable QM tool. But what counts is not perfection - but the first step.

Just get started

- With an initial template
- A clearly defined area
- A well thought-out structure

Every operation that works with flowtify from today is:

- more transparent
- less error-prone
- better prepared

Yes, there will be friction

- Perhaps some will have to give up cherished processes.
- Some locations will grumble - especially those that have interpreted paper documentation in a rather “creative” way.
- On paper, it was perhaps still possible to slip under the radar somehow. Digitally, however, what really happens in operations is immediately visible. And this is exactly what some colleagues may find “unpleasant”.

And that is precisely why it is important

Because you are introducing a system that:

- gives kitchen managers a real overview
- enables area managers to work with foresight
- ensures trust & control vis-à-vis authorities

And practice shows: Companies with clear digital documentation achieve better audit results.

Conclusion: Change is rarely convenient - but it is necessary.

With the right structure and system, flowtify will be:

- **your most powerful QM tool**
- **your lever for responsibility**
- **your companion for scaling & security**