



IT technicians · Zoho One optimization



Zoho Bookings

User and Administrator Manual

→ [Go to the index](#)

Prepared by Nuagix · September 2026

nuagix.ca · support@nuagix.ca

Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

Index — English version

Click any title to jump directly to that section. Each chapter ends with a “Back to index” link.

PART 1 — USER GUIDE

1. Introduction and access

- 1.1 About this manual
- 1.2 What is Zoho Bookings?
- 1.3 Signing in

2. Interface and navigation

- 2.1 Interface elements
- 2.2 Calendar views

3. Event types

- 3.1 Available types
- 3.2 Creating an event type
- 3.3 Scheduling rules

4. Availability

- 4.1 Setting your working hours
- 4.2 Exceptions and time off
- 4.3 Distribution among staff (Round robin)

5. Calendars and video meetings

- 5.1 Syncing your calendar
- 5.2 Video meetings

6. Booking page

- 6.1 Customizing the page
- 6.2 Sharing and embedding

7. Booking forms

- 7.1 Configuring the form
- 7.2 Form best practices

8. Managing appointments and customers

- 8.1 Booking for a customer
- 8.2 Appointment actions
- 8.3 Customer records

9. Online payments

- 9.1 Collecting payment at booking
- 9.2 Points to consider

10. Confirmations and reminders

- 10.1 Automatic notifications
- 10.2 Channels

11. Reports

- 11.1 Available reports
- 11.2 Viewing a report

12. Mobile app

12.1 Features

13. Best practices

13.1 Nuagix recommendations

PART 2 — ADMINISTRATOR GUIDE

14. Users and roles

14.1 Roles

14.2 Adding a user

14.3 When an employee leaves

15. Workspaces

15.1 Principles

15.2 Creating a workspace

16. Resources

16.1 Adding a resource

16.2 Typical uses

17. Organization settings

17.1 Basic settings

17.2 Payments

18. Automation

18.1 Automation tools

18.2 Workflow examples

19. Integrations

19.1 Zoho integrations

19.2 Other integrations

20. Security and compliance

20.1 Security controls

20.2 Privacy and Quebec Law 25

21. Editions and licenses

21.1 Editions

21.2 Tracking usage

22. Deployment checklist

22.1 Before going live

APPENDIX

A. English-French glossary

A.1 Interface terms

Part 1 — User Guide

1. Introduction and access
2. Interface and navigation
3. Event types
4. Availability
5. Calendars and video meetings
6. Booking page
7. Booking forms
8. Managing appointments and customers
9. Online payments
10. Confirmations and reminders
11. Reports
12. Mobile app
13. Best practices

[↑ Back to index](#)

1. Introduction and access

1.1 About this manual

This manual describes the Zoho Bookings features available to users and the functions reserved for administrators, as available in September 2026.

Available features vary by edition (Free, Basic, Premium, Zoho One) and by your organization's configuration.

1.2 What is Zoho Bookings?

Zoho Bookings is Zoho's online appointment scheduling software. Your customers book a time slot themselves from a booking page, based on the real availability of your team and resources.

Bookings syncs calendars, creates the video meeting link automatically, sends confirmations and reminders, and can collect payment at the time of booking.

1.3 Signing in

1. Go to <https://bookings.zoho.com> (or <https://bookings.zohocloud.ca> if your organization is hosted in the Canadian data center).
2. Sign in with your Zoho account or your organization's single sign-on.
3. If you use Zoho One, open the app launcher and select Bookings.
4. Complete multi-factor authentication with Zoho OneAuth if required.

Nuagix tip — Install the Zoho Bookings mobile app to check your schedule and receive new bookings in real time, and the browser extension to share your booking links quickly.

[↑ Back to index](#)

2. Interface and navigation

2.1 Interface elements

Element	Purpose
Workspace	Groups the event types, staff and booking page of a team or location
Calendar	Upcoming appointments by day, week or month, per staff member or resource
Event types	Services or meetings offered for booking
Users	Staff members who receive appointments
Resources	Bookable rooms, equipment or vehicles
Customers	People who have booked, with their history
Reports	Booking, cancellation and revenue statistics
Admin Center	Organization settings, reserved for administrators

2.2 Calendar views

- Day, week and month
- Filter by workspace, staff member, resource or event type
- Colour coding by status (upcoming, completed, cancelled, no show)
- Create an appointment by clicking directly on a free slot

[↑ Back to index](#)

3. Event types

3.1 Available types

Type	Use
One-on-one	One customer meets one staff member (consultation, demo, support)
Group booking	Several customers book the same session (workshop, class, webinar), up to a maximum capacity
Collective booking	Several staff members must attend; only slots free for all are offered
Resource booking	Booking a room, piece of equipment or space, with or without staff

3.2 Creating an event type

1. In the workspace, go to Event types > New.
2. Choose the type (one-on-one, group, collective or resource).
3. Enter the name, duration, description and location: in person (address) or video meeting (Zoom, Zoho Meeting, etc.).
4. Assign the staff members or resources that offer this appointment.
5. Set the price, if applicable, and the booking form.
6. Save and check the preview on the booking page.

Nuagix tip — Name event types from the customer's point of view (e.g., "Free initial consultation — 30 min") rather than with an internal code.

3.3 Scheduling rules

- Buffer time before and after each appointment
- Minimum notice (e.g., no bookings less than 24 hours ahead)
- Booking window (e.g., up to 60 days in the future)
- Maximum number of appointments per day or per staff member
- Interval between offered slots (e.g., every 15 or 30 minutes)
- Cancellation and rescheduling policy (minimum notice)

[↑ Back to index](#)

4. Availability

4.1 Setting your working hours

1. Open your user profile > Availability.
2. Enter your working hours for each day of the week; add several ranges if needed (e.g., 9 a.m. to 12 p.m. and 1 p.m. to 5 p.m.).
3. Choose your time zone (e.g., Eastern Time).
4. Save: only these slots will be offered to customers.

4.2 Exceptions and time off

- Special hours for a specific date
- Time off and vacation (Unavailability) blocking all bookings
- Organization holidays (e.g., Quebec's Fête nationale, Canada Day, Thanksgiving)
- Availability specific to an event type (e.g., consultations on Tuesdays only)

Nuagix tip — Enter Quebec's statutory holidays for the whole year in January: you will avoid bookings on days the office is closed.

4.3 Distribution among staff (Round robin)

When a one-on-one event type is offered by several staff members, the customer can choose the person or let Bookings assign one automatically. Automatic assignment distributes appointments based on availability and workload balance, which suits sales and support teams.

[↑ Back to index](#)

5. Calendars and video meetings

5.1 Syncing your calendar

1. Profile > Integrations > Calendars.
2. Connect Zoho Calendar, Google Calendar or Microsoft 365 / Outlook.
3. Choose the calendars to check for conflicts: a busy event blocks the slot in Bookings.
4. Choose the calendar where new appointments are added.

Caution — Without syncing, a customer could book a slot when you are already busy. Connect your main calendar before sharing your link.

5.2 Video meetings

Service	How it works
Zoom	A unique meeting link is created for each appointment
Zoho Meeting	Meeting link created automatically, included with Zoho One and Workplace
Microsoft Teams and Google Meet	Depending on the integration configured by the administrator
Zoho Assist	Remote support session linked to the appointment

Note — The video meeting link is included in the confirmation email, the calendar invitation and the reminders.

[↑ Back to index](#)

6. Booking page

6.1 Customizing the page

1. Workspace > Booking page.
2. Choose the layout and theme; add your logo, colours and a cover image.
3. Choose the page language (French, English and others).
4. Choose the event types and staff displayed.
5. Edit the page address (URL), and use a custom domain depending on edition.

6.2 Sharing and embedding

- Link to the workspace page, a staff member's page or a specific event type
- Embed in your website (iframe code, button or pop-up)
- Widget for Zoho Sites, WordPress and others
- Link in your email signature
- QR code for your posters, business cards or counter
- Single-use booking link for a specific customer

Nuagix tip — Add a clearly visible “Book an appointment” button on your website's home and Contact pages: it is often the simplest way to increase requests.

[↑ Back to index](#)

7. Booking forms

7.1 Configuring the form

1. Open the event type > Booking form.
2. Keep the basic fields (name, email, phone) and add useful fields.
3. Field types: text, dropdown, checkboxes, date, number and, depending on edition, file upload.
4. Set mandatory fields and help text.
5. Add a consent checkbox for the collection of personal information and, if needed, for marketing communications.

7.2 Form best practices

- Ask only for the information needed for the appointment
- Ask about the purpose of the meeting so you can prepare
- Ask for the preferred language (French or English)
- Use Zoho Forms for more complex forms and link them to the booking, if needed

[↑ Back to index](#)

8. Managing appointments and customers

8.1 Booking for a customer

1. In the calendar, click a free slot or New appointment.
2. Choose the event type, staff member and time.
3. Search for the existing customer or enter their details.
4. Confirm: the customer receives the confirmation email and calendar invitation.

8.2 Appointment actions

Action	Effect
Reschedule	Move the appointment; the customer is notified automatically
Cancel	Cancel with a reason; the slot becomes available again
Mark as completed	Confirm that the appointment took place
No show	Record that the customer did not show up
Reassign	Transfer to another staff member
Notes	Add internal notes visible to the team

8.3 Customer records

- Contact details and form answers
- History of past and upcoming appointments
- Related payments
- Sync with Zoho CRM to avoid double entry

Nuagix tip — Always mark no-shows: reports will help you decide whether to require a deposit or send an extra reminder.

[↑ Back to index](#)

9. Online payments

9.1 Collecting payment at booking

1. Ask the administrator to connect a payment gateway (e.g., Stripe, PayPal or another, depending on region).
2. In the event type, enter the price in Canadian dollars (CAD).
3. Choose to require full payment or a deposit, depending on available options.
4. The customer pays online before the appointment is confirmed.

9.2 Points to consider

- Taxes: state whether the price includes GST and QST
- Refund policy for cancellations, clearly displayed
- Invoicing and bookkeeping in Zoho Books or Zoho Invoice, if needed
- Gateway fees charged by the provider

Note — Confirm the tax treatment of your services with your accountant before enabling online payments.

[↑ Back to index](#)

10. Confirmations and reminders

10.1 Automatic notifications

Notification	Timing
Confirmation	Upon booking, to the customer and the staff member
Reminder	Before the appointment (e.g., 24 hours and 1 hour before)
Reschedule / cancellation	As soon as the change is made
Follow-up	After the appointment (e.g., thank-you, survey link)

10.2 Channels

- Email, with customizable templates in French and English
- SMS, depending on edition and credits
- WhatsApp, through the available integration
- Mobile app notifications for staff

Nuagix tip — A text reminder the day before noticeably reduces no-shows: enable it at least for in-person appointments.

[↑ Back to index](#)

11. Reports

11.1 Available reports

- Number of appointments per period, event type, staff member or workspace
- Cancellation, rescheduling and no-show rates
- Revenue collected per event type
- Most-booked hours to adjust your availability
- Export to CSV or PDF

11.2 Viewing a report

1. Open the Reports tab.
2. Choose the report and period.
3. Filter by workspace, staff member or event type.
4. Export or share the report as needed; use Zoho Analytics for cross-app analysis.

[↑ Back to index](#)

12. Mobile app

12.1 Features

- View your schedule and your team's
- Book, reschedule or cancel an appointment
- Get a notification for every new booking
- Share your booking link by text or email
- Edit your availability and time off
- Join the video meeting in one tap

[↑ Back to index](#)

13. Best practices

13.1 Nuagix recommendations

- Sync your calendar before sharing any link
- Plan buffer time between appointments for notes and travel
- Set a realistic minimum notice so you can prepare
- Offer the booking page in French and English for Quebec customers
- Enable email and text reminders
- Update time off and holidays in advance
- Review reports every month to adjust your time slots

[↑ Back to index](#)

Part 2 — Administrator Guide

- 14. Users and roles
- 15. Workspaces
- 16. Resources
- 17. Organization settings
- 18. Automation
- 19. Integrations
- 20. Security and compliance
- 21. Editions and licenses
- 22. Deployment checklist

[↑ Back to index](#)

14. Users and roles

14.1 Roles

Role	Access
Super Admin	Account owner (one per account): full access, including the subscription
Admin	All calendars, reports, booking pages, templates, integrations and users
Workspace Admin	Same rights, limited to the workspaces assigned to them
Manager	Their calendar, reports, availability, pages and templates
Staff	Their own calendar, availability and booking link

14.2 Adding a user

1. Admin Center > Users > New user.
2. Enter the name, email address and, if needed, title and photo.
3. Assign the role and workspaces.
4. Assign the event types they offer.
5. The user receives an invitation and sets up their availability and calendar.

Note — In Zoho One, first add the user in the Zoho One console and assign them the Bookings app.

14.3 When an employee leaves

1. Reassign their upcoming appointments to another staff member and notify customers.
2. Remove them from event types and automatic assignment.
3. Remove their booking link from your website and email signatures.
4. Deactivate or delete the user to free the license.

Caution — If the user is deleted before reassignment, their upcoming appointments may no longer be followed by anyone.

[↑ Back to index](#)

15. Workspaces

15.1 Principles

A workspace groups the event types, staff, resources and booking page of a team, department or location. Each workspace can have its own business hours, language, branding and administrators.

15.2 Creating a workspace

1. Admin Center > Workspaces > New workspace.
2. Enter the name (e.g., Quebec City branch, Customer Service, Montreal Clinic).
3. Set business hours, time zone and currency (CAD).
4. Add staff and designate a Workspace Admin.
5. Create event types and customize the booking page.

Nuagix tip — Create one workspace per location or per team with its own clientele: reports and access stay clear.

[↑ Back to index](#)

16. Resources

16.1 Adding a resource

1. Admin Center > Resources > New resource.
2. Name the resource (e.g., Conference Room A, Ultrasound machine, Demo vehicle).
3. Set its availability and, if needed, its capacity.
4. Link it to the event types that require it.

16.2 Typical uses

- Renting rooms or workstations
- Specialized equipment shared among several professionals
- Appointments requiring both a staff member and a room
- Lending equipment to customers

[↑ Back to index](#)

17. Organization settings

17.1 Basic settings

- Company profile: name, address, logo, time zone, date and time format
- Currency (CAD) and tax settings
- Default language for pages and notifications
- Custom domain for booking pages, depending on edition
- Organization holidays
- Email and SMS templates for notifications

17.2 Payments

1. Admin Center > Integrations > Payments.
2. Connect the chosen gateway with the company account.
3. Set the currency and refund options.
4. Make a test payment before enabling prices on event types.

Caution — Never use a personal payment account: always connect the account in the company's name.

[↑ Back to index](#)

18. Automation

18.1 Automation tools

Tool	Use
Custom workflows	Trigger actions on booking, rescheduling, cancellation or after the appointment
Notifications and reminders	Scheduled emails, texts and WhatsApp messages
Zoho Flow	Connect Bookings to other apps without code
Webhooks	Send booking data to another system
Custom functions (Deluge)	Custom logic, depending on edition
AI-powered setup	Suggest event types and settings from a description of your business

18.2 Workflow examples

- After a completed appointment: send a Zoho Survey satisfaction survey
- On booking: create or update the contact and an activity in Zoho CRM
- On a no-show: send an email inviting the customer to rebook
- On cancellation: notify the team manager

Nuagix tip — Record every workflow (trigger, action, owner) in a shared list to make maintenance easier.

[↑ Back to index](#)

19. Integrations

19.1 Zoho integrations

Application	Typical use
Zoho CRM	Create leads or contacts and log appointments as activities
Zoho Meeting / Zoho Assist	Automatic video meeting or remote support link
Zoho Calendar	Two-way event sync
Zoho Desk	Support appointments linked to tickets
Zoho SalesIQ	Offer a booking in your website chat
Zoho Sites	Embed the booking page in your site
Zoho Flow	Cross-app automations

19.2 Other integrations

- Google and Microsoft 365 / Outlook calendars
- Zoom, Microsoft Teams and Google Meet
- Payment gateways (e.g., Stripe, PayPal)
- WhatsApp and SMS providers
- Browser extension for Gmail and others
- REST API (OAuth 2.0) and webhooks

[↑ Back to index](#)

20. Security and compliance

20.1 Security controls

- Multi-factor authentication and single sign-on (SAML) via Zoho Accounts / Zoho Directory
- Roles limiting access to calendars and customer data
- Customer data export restricted by role
- Audit log of user actions, depending on edition
- Hosting in the Canadian data center (zohocloud.ca)

20.2 Privacy and Quebec Law 25

- Limit the booking form to the information you need
- Add a consent checkbox and a link to your privacy policy
- Avoid collecting detailed health information in the form unless necessary and properly safeguarded
- Handle access, correction and deletion requests
- Set a retention period for inactive customer data

Note — This manual is not legal advice. Confirm your obligations with your legal advisor.

[↑ Back to index](#)

21. Editions and licenses

21.1 Editions

Edition	For whom
Free	Self-employed: one user, basic features
Basic	Small teams: several users, calendar and video meeting integrations
Premium	Organizations: multiple workspaces, workflows, custom domain, SMS, higher limits
Zoho One / Zoho Workplace	Bookings included with the suite's other apps, depending on the offer

Note — Editions and the feature split change over time: confirm current options on the Zoho Bookings pricing page.

21.2 Tracking usage

Admin Center > Subscription shows the edition, number of active users and SMS credits. Remove licenses from deactivated users.

[↑ Back to index](#)

22. Deployment checklist

22.1 Before going live

- ☐ Company profile, time zone, currency (CAD) and language configured
- ☐ Workspaces created
- ☐ Users added with the right roles
- ☐ All staff calendars synced
- ☐ Event types, durations and scheduling rules defined
- ☐ Availability, time off and holidays entered
- ☐ Resources created and linked, if applicable
- ☐ Booking page customized in French and English
- ☐ Forms, consent and privacy policy in place
- ☐ Payment gateway connected and tested, if applicable
- ☐ Notifications and reminders (email, SMS) checked
- ☐ Integrations (CRM, Zoom or Zoho Meeting) tested
- ☐ Link embedded in the website and users trained

Nuagix tip — Nuagix can support your team with Zoho Bookings setup, integration and training.
Book a Zoom meeting: <https://nuagix.zohobookings.com/#!/andre-martin>

[↑ Back to index](#)

Appendix

A. English-French glossary

[↑ Back to index](#)

A. English-French glossary

A.1 Interface terms

English (interface)	French
Workspace	Espace de travail
Event type	Type de rendez-vous
Appointment	Rendez-vous
Booking	Réservation
Booking page	Page de réservation
Booking form	Formulaire de réservation
Staff	Membre du personnel
Resource	Ressource
Customer	Client
Availability	Disponibilité
Special hours	Heures particulières
Unavailability	Congé / indisponibilité
Buffer time	Temps tampon
Round robin	Répartition automatique
Reschedule	Reporter
Cancel	Annuler
No show	Absence
Reminder	Rappel
Admin Center	Centre d'administration
Workspace Admin	Administrateur d'espace

[↑ Back to index](#)