📅 Employee Training Manual: Adjusting Your Work Schedule in ZenBooker

Objective

To give employees the ability to adjust their availability, request time off, or make scheduling changes in ZenBooker while ensuring team coordination and customer service is uninterrupted.

📌 Core Principles

- Schedule adjustments must be made with reasonable notice—ideally at least 48 hours in advance.
- All changes must be confirmed within ZenBooker and communicated to your manager if they affect assigned jobs.
- Only adjust your own schedule—never change another team member's shifts.
- Avoid making personal availability changes during high-volume days unless it's an emergency.

🧽 Step-by-Step: Adjusting Your Availability or Shifts

Log Into Your ZenBooker Profile

Access the staff dashboard using your login credentials.

Go to the 'Availability' or 'Schedule' Tab

Click the section where your calendar or schedule is listed.

Add or Edit Available Time Blocks

Click on the calendar to add or change your working hours for specific days.

Request Time Off (If Needed)

Use the 'Time Off' or 'Unavailable' setting to block full days. Add a reason if prompted.

Check for Overlapping Jobs

If you're already assigned to a job during the time you're adjusting, notify your manager before making the change.

Save and Confirm Changes

Click 'Save' or 'Submit' to finalize the schedule update. You may get a confirmation message or email.

✨ Pro Tip to Elevate the Experience

Try to keep your schedule consistent from week to week—it helps managers assign jobs efficiently and gives clients reliable service.

✅ Schedule Adjustment Checklist

- Logged into your own staff profile
- Updated only your own availability
- Checked for conflicts with assigned jobs
- Notified a manager if any jobs are affected
- Time blocks or time off saved correctly in the system

🔁 Employee Training Manual: How to Create a Recurring Appointment in ZenBooker

Objective

To correctly schedule a recurring appointment using ZenBooker—ensuring clients receive consistent service at regular intervals and staff are assigned efficiently.

📌 Core Principles

- Always confirm the client's preferred frequency before scheduling (weekly, bi-weekly, monthly).
- Make sure the recurring appointment matches the client's original service type, staff preferences, and time availability.
- Double-check your work to avoid scheduling errors or overlaps.
- Always confirm with the client that their schedule is set and send a confirmation email if needed.

🍃 Step-by-Step: Creating a Recurring Appointment in ZenBooker

Log In

Access your ZenBooker admin dashboard using your staff login credentials.

Find the Client or Create New

Use the search bar to locate an existing client or click 'New Appointment' to begin scheduling.

Select the Initial Appointment Date

Choose the starting day and time based on the customer's preference.

Enter Service Details

Fill out all fields including service type, location, duration, and team assignment.

Check 'Recurring' Box

Below the service info, select the checkbox labeled 'Recurring appointment'.

Set Frequency

Choose the desired interval: weekly, bi-weekly, every 4 weeks, monthly, etc.

Set Recurrence End Date (Optional)

You can set the series to stop after a certain date or number of visits, or leave it open-ended.

Save and Review

Click 'Save' or 'Create Appointment' to lock it in. Double-check the full schedule appears in the client calendar.

Send Confirmation

Ensure the customer receives a confirmation email and knows when to expect the next visit.

✨ Pro Tip to Elevate the Experience

If a client requests 'every other Thursday,' count forward on the calendar to avoid accidentally choosing the wrong start week.

✅ Recurring Appointment Checklist

- Correct client selected or added
- Service details match original booking
- Recurring frequency and start date set properly
- Customer received confirmation
- Staff and calendar properly assigned

🔁 Employee Training Manual: Editing or Cancelling Recurring Appointments in ZenBooker

Objective

To make changes to or cancel a recurring appointment in ZenBooker—ensuring updates are accurate, customer communication is clear, and team schedules are adjusted as needed.

📌 Core Principles

- Always confirm changes with the client before editing or canceling a recurring appointment.
- Be careful to update the correct series—whether a single occurrence or the entire recurring pattern.
- Communicate clearly with the customer to avoid confusion or missed service.
- If uncertain, ask a manager before canceling or editing an active series.

✏️ How to Edit a Recurring Appointment

Log In and Find the Appointment

Go to the calendar or customer profile and select the recurring appointment you want to edit.

Choose 'Edit' or 'Edit Series'

If you want to change all upcoming visits, choose 'Edit Series.' To change just one, select that date and edit it individually.

Update the Details

Modify the time, service type, team member, frequency, or any other relevant field.

Save Changes

Be sure to click 'Save' or 'Update Series' when done.

Confirm With the Client

Let the client know what was updated and confirm the new schedule.

🛑 How to Cancel a Recurring Appointment

Locate the Recurring Appointment

Find the appointment through the customer account or calendar view.

Click 'Cancel' or 'Cancel Series'

If canceling the entire series, choose 'Cancel Series.' To cancel only one visit, select that date and cancel just that occurrence.

Confirm the Cancellation

ZenBooker will ask for confirmation. Review before submitting.

Notify the Client

Always let the client know the cancellation was processed and offer to reschedule if needed.

Make Notes (If Required)

If the cancellation was requested by the client, note that in the system for future reference.

✨ Pro Tip to Elevate the Experience

If a client asks to pause service for travel or illness, cancel upcoming dates individually instead of the entire series—then resume later without rebooking.

✅ Appointment Change Checklist

- Correct appointment or series selected
- Details updated or cancelled with customer confirmation
- No unintended deletions or overlaps created
- Client informed of change with new dates confirmed
- Internal notes added if relevant