



Getting started with Zoho Shifts (For Admins)

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Zoho Shifts is employee scheduling software that helps plan your schedules beforehand, making it effortless for businesses of all sizes to schedule, track, and communicate with their team members. The purpose of this guide is to assist you in the initial setup of Zoho Shifts, ensuring a smooth and trouble-free onboarding process.

 **Note:** We provide a free 30-day trial of our Standard plan to all new customers. You can explore Zoho Shifts' advanced features during this period and select the subscription that suits your needs.

This document will guide you through the setup process to help your business start using Zoho Shifts effortlessly.

- Set up your Zoho Shifts account
- Configure your account
- Add employees to your account

Set up your Zoho Shifts account

If you are a new Zoho user, follow these steps:

1. Visit www.zoho.com/shifts This will take you to the official Zoho Shifts website.
2. Click **GET STARTED** in the top-right corner. The *Create new account* window will appear.
3. Enter your details, such as Full Name, Email, Password, and Organization Name.

Have a Zoho Account? [SIGN IN](#)

Zoho Shifts

Start your Free Trial.

Full Name *

Email *

Password *

Organization Name *

I agree to the [Terms of Service](#) and [Privacy Policy](#).

SIGN UP NOW

or sign in using Google LinkedIn

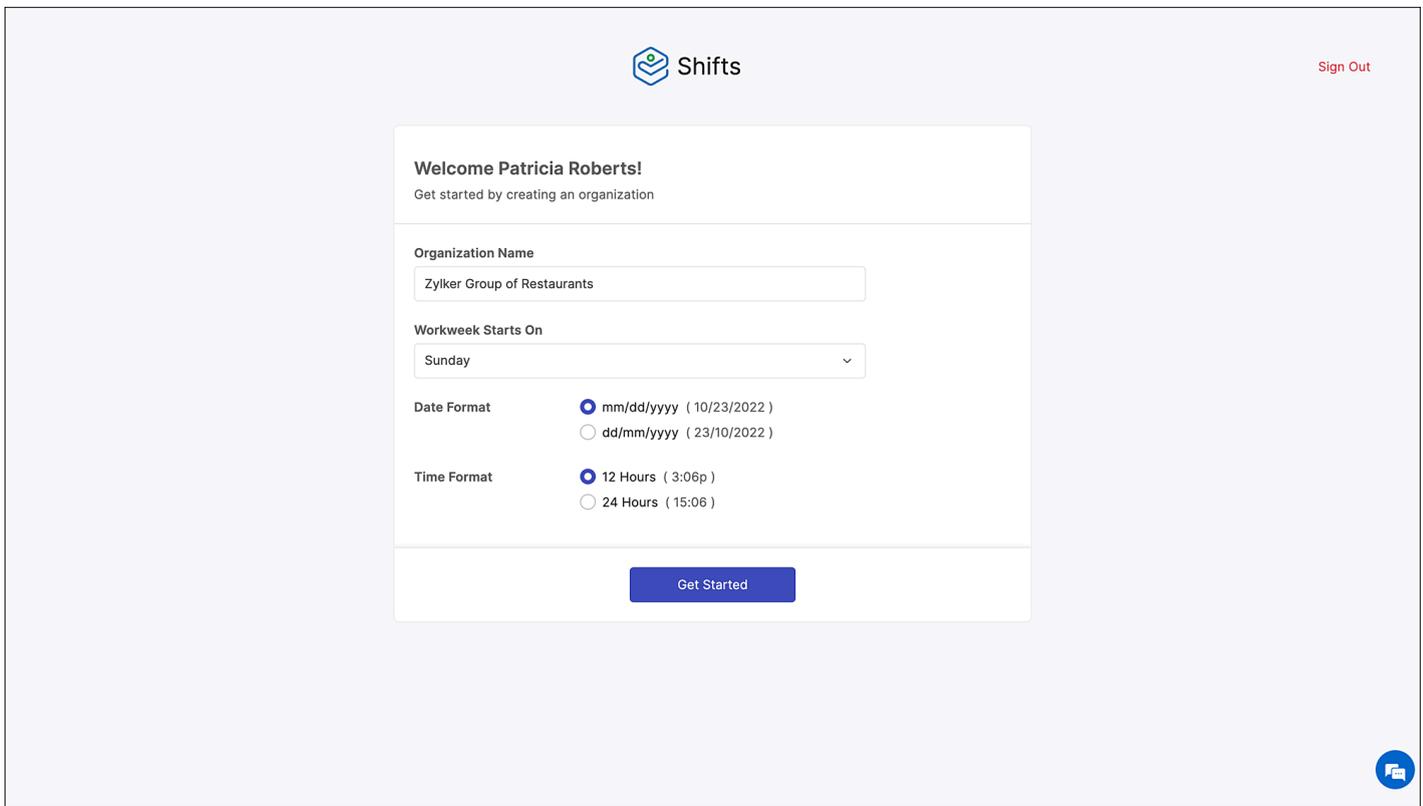
4. Mark the **I agree to the Terms of Service and Privacy Policy** checkbox after carefully reviewing it.

Click **SIGN UP NOW**. This will create a new Zoho Shifts account for your business and take you to the *Enter organization details* window.

Note: You can also use your Google or LinkedIn account for a quicker sign up.

If you are an existing Zoho user, follow these steps:

1. Go to the [Zoho Shifts homepage](#), then click **Access Zoho Shifts**.
2. Click **Create New Organization**.
3. Provide your organization details such as Organization Name, Workweek Starts On, Date Format, and Time Format.



4. Click **Get Started**. You have now successfully added your organization's details.

Configure your account

Configure your Zoho Shifts account to add more information about your organization, employees, their attendance, work schedules, and other details. To do this, access the **Settings** icon on the homepage, which will open the *Settings* window.

Here, you can add or edit settings related to your:

- Organization
- Schedules
- Employees
- Time off
- Time and attendance

Organization settings

Add more details about your organization, such as business locations, positions, time zones, and other relevant information.

General Settings

The **General** tab under the Organization settings allows you to configure essential business information, such as Organization Name, Timezone, Country, Currency, and Language. You can also set your preferred time format and specify your preferred start day of the workweek here.

The screenshot shows the 'General' tab of the 'Organization' settings in the Zylker Shifts application. The interface includes a top navigation bar with 'Shifts', 'Dashboard', 'Employees', 'Schedule', 'Time Off', 'Timesheets', 'Reports', and 'Messages'. A user profile 'Standard - Trial Upgrade' is visible in the top right. The left sidebar lists various settings categories: Organization (General, Schedules, Positions, Job Sites, Messages), Schedule (Preferences, Breaks, Shift Templates), Employee (Access Levels, Skills), Time Off (Preferences, Time Off Types, Blocked Days, Holidays), and Time & Attendance (Time Clock, Overtime Rules). The main content area is divided into several sections: 1. 'Name' (Zylker Group of Restaurants), 'Timezone' (Central Daylight Time (America/Chicago)), 'Country' (United States), and 'Currency' (USD - United States Dollar). 2. 'Language' (English). 3. 'Date Format' (mm/dd/yyyy (10/23/2015) selected) and 'Time Format' (12 Hours (3:06p) selected). 4. 'Workweek Starts On' (Sunday). To the right, the 'Account Owner Information' section shows the account owner as Patricia Roberts (PR) with email patriciaroberts@zylker.com and a 'Change Account Owner' button. A 'Save' button is located at the bottom left of the settings area.

Schedules

Effectively create multiple schedules by selecting the **+Add Schedule** option, allowing the seamless addition of multiple workplaces, teams, departments, and groups.

Edit Schedule ✕

Name
Zylker Group of Restaurants, HQ

Timezone
(-05:00) Central Daylight Time (America/Chicago) ▾

Address
6800 Burleson road, Suite 200, Austin TX 78744



Map Satellite

Keyboard shortcuts Map data ©2023 Google Terms Report a map error

Cancel Save Schedule

Positions

Set up different job titles within your company for quick assignment to employees. Simply provide the **Position Name** and select the appropriate schedule. To differentiate between multiple positions, you can assign color codes to each position.

Add multiple positions by clicking **+Add Position** in the top-right corner. You can also edit or delete the created job positions whenever required.

Edit Job Site ✕

Name

Address

Map **Satellite**

Keyboard shortcuts Map data ©2023 Google Terms Report a map error

Notes

All Schedules

Specific Schedules

- Zylker Group of Restaurants, HQ
- Zylker Group of Restaurants, Pleasanton

If you have a list of job sites, you can also import them using the **Import** option from the **More** dropdown menu.

The screenshot displays the 'Job Sites' management interface. At the top, there's a navigation bar with 'Shifts' and various tabs like 'Dashboard', 'Employees', 'Schedule', 'Time Off', 'Timesheets', 'Reports', and 'Messages'. The left sidebar lists categories: 'Organization' (General, Schedules, Positions, Job Sites, Messages), 'Schedule' (Preferences, Breaks, Shift Templates), 'Employee' (Access Levels, Skills), and 'Time Off' (Preferences, Time Off Types, Blocked Days, Holidays). The main content area is titled 'Job Sites' and includes a search bar, a 'More' dropdown menu (with 'Import' and 'Export' options highlighted), and a '+ Add Job Site' button. Below this is a table with columns for 'Name', 'Address', and 'Schedules'. One entry is visible: 'Zyker IT services' with address '255 Saengerhalle Rd, New Braunfels, TX 78130, United States' and schedule 'Zyker Group of Restaurants, HQ'. Action buttons for 'Edit' and 'Delete' are present for this entry. At the bottom, it says 'Showing: 1 - 1 of 1'.

Messages

Enabling messages allows your employees to communicate and collaborate with both you and their colleagues by sending instant direct messages. To do this, navigate to the **Messages** tab under *Organization* and use the toggle switch to **Enable messaging**.

 **Note:** The message feature is currently in Beta version.

The dialog box is titled 'Enable messaging' and features a close button (X) in the top right corner. The main text reads: 'Enabling messages will allow your employees to send direct messages to other employees.' At the bottom, there are two buttons: a 'Cancel' button and an 'Enable messaging' button.

Schedule settings

Shift Schedule settings help streamline the scheduling process effectively by enabling the addition of preferences to meet individual needs, breaks, and customization of Shift Templates.

Schedule preferences

A flexible schedule allows employees to swap, offer, drop, or pick up available shifts according to their preferences. These settings are designed to efficiently manage and accommodate sudden changes and constraints in employee shift schedules.

- **Swap Shifts:** Foster flexibility among employees by enabling them to exchange shifts with other employees possessing similar experience and skill sets.
- **Offer Shifts:** Allow employees to transfer their assigned shifts to other employees, particularly during unseen circumstances or emergencies.
- **Drop Shifts:** Grant employees the right to surrender or release their scheduled shifts, enabling other employees to readily fill the vacancies.
- **Open Shifts:** Facilitate your employees to volunteer and take up the additional shifts based on their availability.

To add shift preferences:

1. Go to **Preferences** under **Schedule**.
2. Use the toggle to add the preference settings and control to Swap Shifts, Offer Shifts, Drop Shifts, and much more.

4. Click **Save**.

Add breaks

The inclusion of breaks in job schedules helps maintain employee health and well-being contributing to a more productive and positive business environment.

1. Go to **Breaks** under **Schedule**.
2. Click + **Add Break**.
3. Add a break by providing details like name and duration, and select the type of the break.

Edit Break [Close]

Name
Meal Break

Duration
30 mins

Type
 Paid Unpaid

Cancel Save Break

4. Select **Save Break**.

Configure Shift templates

Shift templates help you customize and save standard or recurring schedules as templates to save time and avoid reworking schedules from scratch.

1. Navigate to the **Shift Templates** tab under *Schedule*.
2. Select + **Add Shift Template**.
3. Enter the details, such as shift start time and end time, schedule to which they belong, position to which they belong, and any notes.

Edit Shift Template ✕

Time
10:00a to 7:00p Hide end time

[+ Add Break](#)

Schedule
Zylker Group of Restaurants, HQ

Position
General and Kitchen Manager

Notes

4. Click **Save Shift Template**.

Employee settings

Employee settings help you manage employees based on job positions, and also help you add skill requirement for different job positions.

Access Levels

Configure the access levels of employees based on job positions to manage and control their job role effectively.

1. Navigate to the **Access Levels** tab under Employee.
2. Select **Edit**. The *Edit Access Level* window will appear on your screen. Based on the job position, select the checkboxes and grant access to specific roles.

Edit Access Level
✕

Name

Manager

Employees

- Add, edit employees
- View profile info
- View wage info
- Edit wage info
- View, add notes
- View contact info

Schedule

- Add, edit shifts
- Publish schedule
- View team schedule (Only assigned schedules)
- View team schedule (All schedules)
- View other employees time off
- Approve swap, offer and drop requests
- Set their own availability
- Set other employees availability

Time Off

- Add, edit time off requests
- Approve time off requests

Timesheet

- Add, edit timesheets
- View their own timesheets
- Add, edit their own timesheets
- Approve timesheets

Messages

- Send direct messages
- Manage channels

Settings

- Add, edit schedules
- Add, edit positions
- Add, edit access levels
- Manage billing
- Manage account and other settings

Reports

- Audit logs
- Payroll report
- Other reports

Cancel

Save Access Level

4. Click **Save Access Level**.

Time Off settings

Customizing your time off settings helps ensure efficient resource management and improved work-life productivity by adding information about working hours, time off types, important days, and holidays.

Preferences

The **Preferences** tab under the *Time Off* settings allows you to configure time off preferences. Using the toggle, you can enable or disable **Time Off**.

Shifts | Dashboard | Employees | Schedule | Time Off | Timesheets | Reports | Messages | Standard - Trial | Upgrade | [User Profile]

- Organization
 - General
 - Schedules
 - Positions
 - Job Sites
 - Messages
- Schedule
 - Preferences
 - Breaks
 - Shift Templates
- Employee
 - Access Levels
 - Skills
- Time Off
 - Preferences**
 - Time Off Types
 - Blocked Days
 - Holidays
- Time & Attendance
 - Time Clock
 - Overtime Rules

Time Off

Enable Time Off

Number of hours in a work day hours

[Save](#)

Time Off Types

Efficiently manage and personalize breaks by selecting the **Time Off Types** under *Time Off* settings. It helps tailor both breaks (paid and unpaid), to align with employees specific needs.

Shifts | Dashboard | Employees | Schedule | Time Off | Timesheets | Reports | Messages | Standard - Trial | Upgrade | [User Profile]

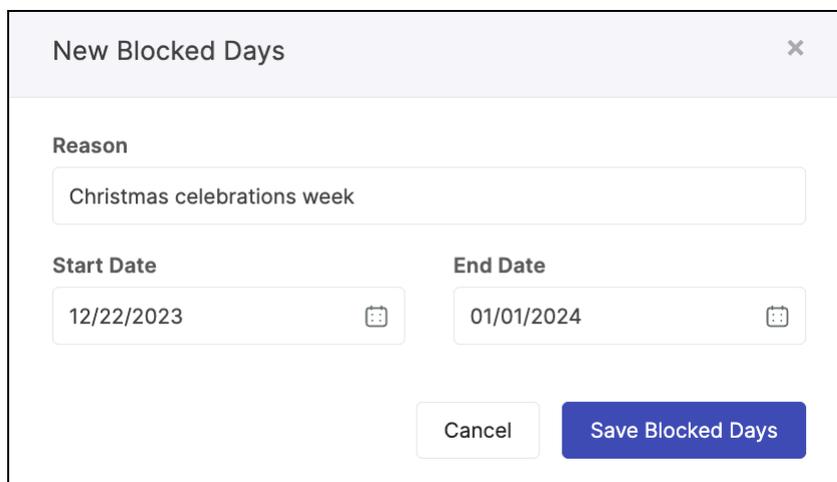
- Organization
 - General
 - Schedules
 - Positions
 - Job Sites
 - Messages
- Schedule
 - Preferences
 - Breaks
 - Shift Templates
- Employee
 - Access Levels
 - Skills
- Time Off
 - Preferences
 - Time Off Types**
 - Blocked Days
 - Holidays
- Time & Attendance
 - Time Clock
 - Overtime Rules

Time Off Types [+ Add Time Off Type](#)

Name	Paid	Minimum Increment		
Sick	Yes	-	Edit	Delete
Unpaid	No	-	Edit	Delete
Vacation	Yes	-	Edit	Delete

Blocked Days

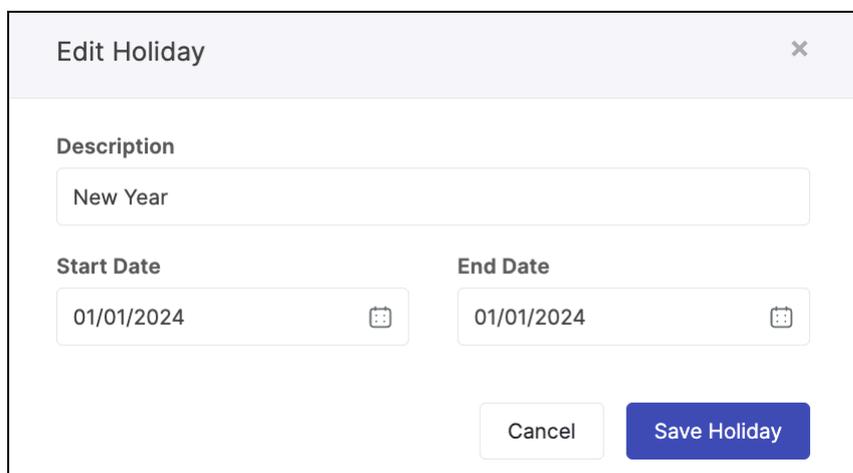
To ensure that business days or periods are adequately staffed and business operations remain uninterrupted, simply click the **Blocked Days** tab under *Time Off* settings.



The screenshot shows a dialog box titled "New Blocked Days" with a close button (X) in the top right corner. It contains a "Reason" text input field with the text "Christmas celebrations week". Below this are two date input fields: "Start Date" with the value "12/22/2023" and "End Date" with the value "01/01/2024". Each date field has a calendar icon to its right. At the bottom of the dialog are two buttons: "Cancel" and "Save Blocked Days".

Holidays

Give employees a better understanding of the days when the organisation is closed or when employees are entitled to time off by selecting the **Holidays** tab under *Time Off* settings.



The screenshot shows a dialog box titled "Edit Holiday" with a close button (X) in the top right corner. It contains a "Description" text input field with the text "New Year". Below this are two date input fields: "Start Date" with the value "01/01/2024" and "End Date" with the value "01/01/2024". Each date field has a calendar icon to its right. At the bottom of the dialog are two buttons: "Cancel" and "Save Holiday".

Time and Attendance settings

Configure the actual clock-in and clock-out times of your employees, set up overtime rules and policies, and their payroll-related settings by accessing the *Time & Attendance* window.

Time Clock

The **Time Clock** tab under *Time & Attendance* settings helps you set up a centralized attendance management system for employees and their working hours.

Enable GPS tracking for mobile applications or web browsers, set notifications before shifts, and much more.

General settings

The General field in the **Time Clock** tab enables you to allow or restrict employees to check in out using multiple devices.

You can also enable the track employees' GPS locations to ensure they sign in only by accessing their desired workplace.

The screenshot shows the 'Time Clock' settings page in Zoho Shifts. The left sidebar contains navigation options: Schedules, Positions, Job Sites, Messages, Schedule (selected), Preferences, Breaks, Shift Templates, Employee (Access Levels, Skills), Time Off (Preferences, Time Off Types, Blocked Days, Holidays), and Time & Attendance (Time Clock selected, Overtime Rules, Payroll). The main content area is divided into three sections:

- General**:
 - Allow employees to clock in/out from web browser:
 - Allow employees to clock in/out from mobile app:
 - Track GPS location
 - Allow only within meters from location
 - Allow employees to clock in/out without a scheduled shift:
- Early In & Late Out Restriction**:
 - Restrict clock in to before shift start:
 - Restrict clock out to after shift end:
- Rounding**:
 - Round clock in time:
 - Rounding direction:

A 'Save' button is located at the bottom left, and a user profile icon is at the bottom right.

Early In and Late Out Restriction

Enable or disable to restrict clock in and clock out timings before and after shifts.

Shifts Dashboard Employees Schedule Time Off Timesheets Reports Messages Standard - Trial Upgrade

Schedules
Positions
Job Sites
Messages

Schedule
Preferences
Breaks
Shift Templates

Employee
Access Levels
Skills

Time Off
Preferences
Time Off Types
Blocked Days
Holidays

Time & Attendance
Time Clock
Overtime Rules
Payroll

Allow clock in only within 100 meters from location

Allow employees to clock in/out without a scheduled shift

Early In & Late Out Restriction

Restrict clock in to 10 mins before shift start

Restrict clock out to 10 mins after shift end

Rounding

Round clock in time

Rounding direction Nearest

Rounding increment 15 mins

Round clock out time

Rounding direction Nearest

Rounding increment 15 mins

Save

Rounding

Configure settings by adding GPS coordinates, such as clock in and clock out time, direction, increment, and much more, allowing for flexible customization of employee time tracking preferences for an accurate attendance record.

Missed Clock In/Out Notifications

Missed clock in and out notifications help remind both employees and managers regarding their shifts, fostering compliance with organizational policies and regulations, so they are accountable for their working hours and responsibilities.

Shifts Dashboard Employees Schedule Time Off Timesheets Reports Messages Standard - Trial Upgrade

Schedules
Positions
Job Sites
Messages
Schedule
Preferences
Breaks
Shift Templates
Employee
Access Levels
Skills
Time Off
Preferences
Time Off Types
Blocked Days
Holidays
Time & Attendance
Time Clock
Overtime Rules
Payroll

Rounding direction: Nearest
Rounding increment: 15 mins
Round clock in time to scheduled shift start time:
Grace period: 10 mins
Round clock out time to scheduled shift end time:
Grace period: 10 mins

Missed Clock In/Out Notifications

Remind employees to clock in: 15 minutes after shift start time
Remind employees to clock out: 15 minutes after shift end time
Alert managers: 10 minutes after shift start time
Alert managers: 10 minutes after shift end time

Save

Overtime Rules

Overtime rules can significantly vary by country, state or region as they are usually defined by labor laws. To do this,

1. Navigate to the **Overtime Rules** tab under *Time & Attendance*.
2. Select **Edit** next the overtime rule you want to add details to. The *Edit Overtime Rule* window will appear.
3. Add details such as Name, Overtime rate and Double time rate, to ensure accurate time tracking and compensation across various timeframes like Daily, Weekly, and others.
4. Click **Save Overtime Rule**.

Edit Overtime Rule
✕

Name

Overtime rate

 times

Double time rate

 times

Daily ▼

Day	Overtime	Double Time
Monday	<input checked="" type="checkbox"/> after 8 hours	<input checked="" type="checkbox"/> after 12 hours
Tuesday	<input checked="" type="checkbox"/> after 8 hours	<input checked="" type="checkbox"/> after 12 hours
Wednesday	<input checked="" type="checkbox"/> after 8 hours	<input checked="" type="checkbox"/> after 12 hours
Thursday	<input checked="" type="checkbox"/> after 8 hours	<input checked="" type="checkbox"/> after 12 hours
Friday	<input checked="" type="checkbox"/> after 8 hours	<input checked="" type="checkbox"/> after 12 hours
Saturday	<input checked="" type="checkbox"/> after 8 hours	<input checked="" type="checkbox"/> after 12 hours
Sunday	<input checked="" type="checkbox"/> after 8 hours	<input checked="" type="checkbox"/> after 12 hours

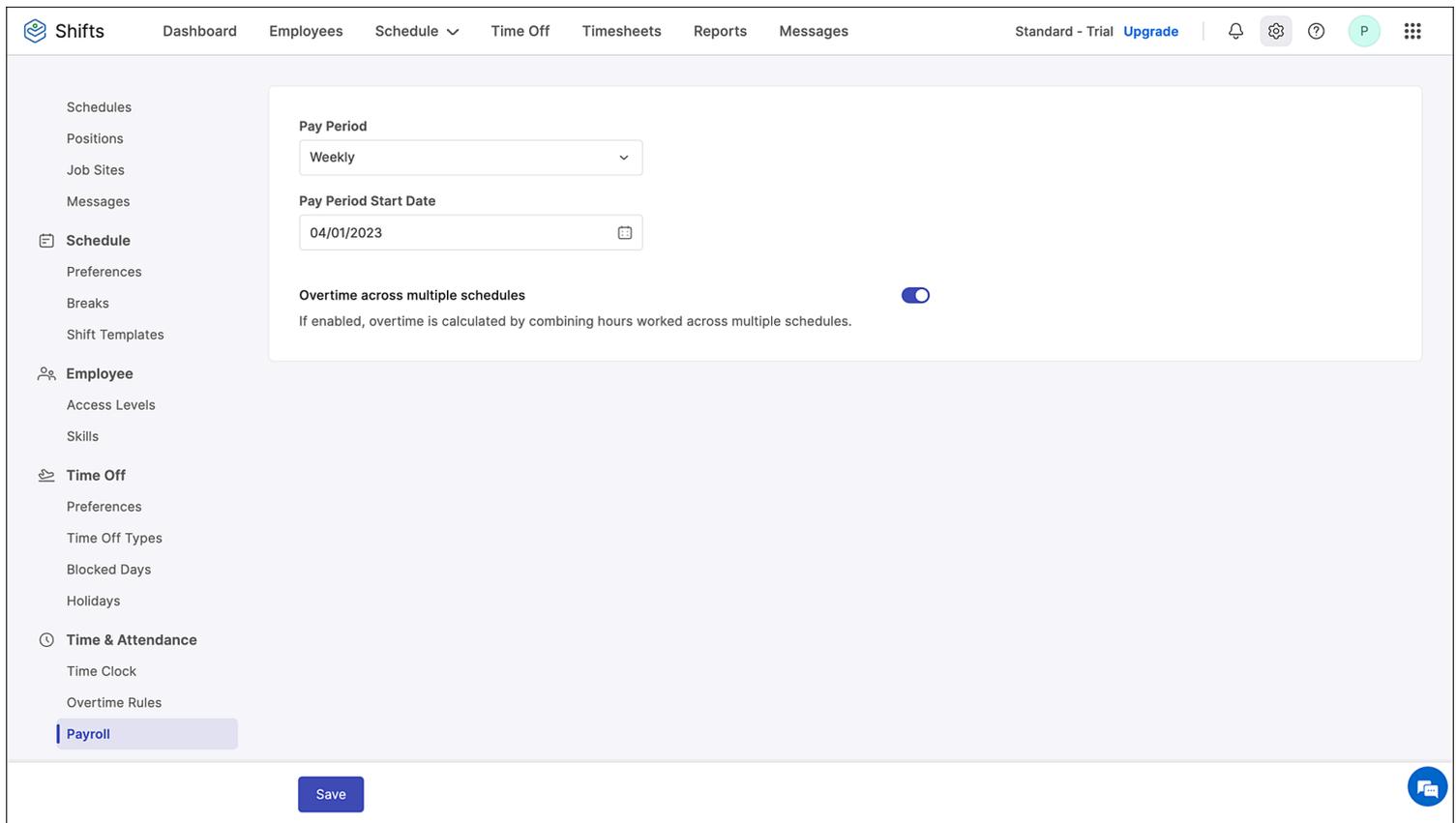
Weekly >

On 7th Consecutive Day >

On Holidays >

Payroll

The **Payroll** tab under the *Time & Attendance* settings allows you to configure the Payroll Period and Pay Period Start Date. By using the toggle switch, you can either enable or disable overtime across multiple schedules.



Add employees to your account

Adding employees to your Zoho Shifts accounts helps streamline employee scheduling, track employee attendance, and facilitate team communication. It also helps in effective workforce management, seamless coordination, and comprehensive reporting. To do this, access the **Employees** tab on the homepage, which will open the *Employees* window.

Here, you can add employees in two ways:

- Batch invitation to multiple employees
- Manual invitation to each employee

Batch invitation to multiple employees

1. Click the **Employees** tab in the top-left corner and click the **More actions** icon (...).

Shifts Dashboard **Employees** Schedule Time Off Timesheets Reports Messages Standard - Trial Upgrade

All Schedules Active Employees All Skills Search + Add Employee

Employee	Mobile	Email	Schedules	Positions	Status
<input type="checkbox"/> Patricia Roberts		patriciaroberts@zylker.com	Zylker Group of Restaurants, HQ		Joined

Showing: 1 - 1 of 1

2. Select **Import**. The *Import Employees* window will appear.

Shifts Dashboard **Employees** Schedule Time Off Timesheets Reports Messages Standard - Trial Upgrade

Import Employees

Steps
1 Upload File 2 Map fields 3 Preview

Upload File [Download a sample csv file](#) and compare it to your import file to ensure you have the file perfect for the import.

Drag and drop the files to upload
Or
[Browse files](#)
Maximum File Size: 5 MB | File Format: CSV

Duplicate Handling *
 Skip
Retains the records in Zoho Shifts and does not sync the identical records from the import file.
 Update
Updates existing records in Zoho Shifts with the identical records in the import file.

File Delimiter *
 Comma (,) Semi-Colon (;)

[Next >](#) [Cancel](#)

Note: You need to upload a .csv file in a specific format. Click on the sample .csv file link in the Upload File field to download the sample .csv file. Refer to this sample and add member details by filling the appropriate data

fields. After entering the details in the suggested format, click **Save**.

3. Click **Browse files**, select the file, and click **Open**. Once done, click **Next**.

The screenshot displays the 'Import Employees' interface in the Zoho Shifts application. The top navigation bar includes 'Shifts', 'Dashboard', 'Employees' (active), 'Schedule', 'Time Off', 'Timesheets', 'Reports', and 'Messages'. The user's account is 'Standard - Trial' with an 'Upgrade' option. The 'Import Employees' section has three steps: '1 Upload File', '2 Map fields', and '3 Preview'. The 'Upload File' step is active, showing a green checkmark and the text 'File uploaded'. Below this, a file named 'Employee details_Sheet1.csv' is shown in a preview box. The 'Duplicate Handling' section has two options: 'Skip' (selected) and 'Update'. The 'File Delimiter' section has two options: 'Comma (,)' (selected) and 'Semi-Colon (;)'. At the bottom, there are 'Next >' and 'Cancel' buttons.

4. Preview employee details and select **Next**.

Shifts Dashboard **Employees** Schedule Time Off Timesheets Reports Messages Standard - Trial Upgrade

Import Employees

Steps: 1 Upload File 2 Map fields 3 Preview

Your Selected File: **Employee details_Sheet1.csv**

Employee Details ⓘ The best match to each field on the selected file have been auto-selected

ZOHO SHIFTS FIELD	IMPORTED FILE HEADERS	SAMPLE DATA FROM FILE	
First Name *	First Name x v	Sarah	Brad
Last Name	Last Name x v	Jackson	Harper
Email	Email x v	sarahjackson@zylker.com	bradharper@zylker.com
Mobile	x v		
Wage	x v		
Schedules *	Schedules x v	Select a schedule v ⓘ	Zylker Group of Restaurants, ... Zylker Group of Restaurants, ...

< Previous Next > Cancel

5. Click **Import** to finish importing the file. Your employees data is recorded.

Shifts Dashboard **Employees** Schedule Time Off Timesheets Reports Messages Standard - Trial Upgrade

Import Employees

Steps: 1 Upload File 2 Map fields 3 Preview

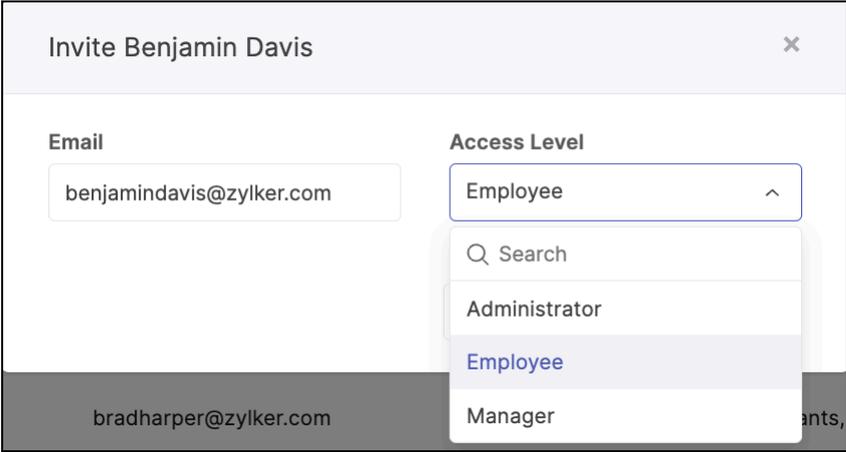
6 of 9 employee(s) in your file are ready to be imported.

- ▶ Employees that are ready to be imported (6)
- ▶ No. of records skipped (3)
- ▶ Unmapped fields (0)
- ▶ Data to be created (3)

< Previous Import Cancel

6. Click the **More actions** icon (...) and click **Invite**. An *employee invitation* window will appear. Perform the necessary actions and click **Invite Employee**.

An invitation will be sent to your employee's registered email address.



The screenshot shows a window titled "Invite Benjamin Davis" with a close button (X) in the top right corner. Below the title bar, there are two main sections: "Email" and "Access Level". The "Email" section contains a text input field with the value "benjamindavis@zylker.com". The "Access Level" section contains a dropdown menu with "Employee" selected. A search icon and the word "Search" are visible above the dropdown options. The options listed in the dropdown are "Administrator", "Employee" (highlighted in blue), and "Manager". At the bottom of the window, there is a dark grey bar with the email address "bradharper@zylker.com" on the left and "ants," on the right.

Manual invitation to each employee

1. Click the **+Add Employee** in the top-right corner.
This will open the *Invite employee* window.
2. Enter details such as Employee's First Name, Last Name, Email, Mobile and other details.
3. Select **Save & Invite**. An invitation will be sent to your employee's registered Email address.