Scheduling Software Buyer’s Checklist

33 questions to answer before you pay for a booking tool · ScheduleCompared · schedulecompared.com · Edition: November 2026

1 · BEFORE YOU COMPARE

☐ Is my job a meeting link (sales calls, consults) or an appointment business (services, staff, rooms, deposits)?

☐ How many people take bookings now, and in 12 months?

☐ How many bookings a month, and how many locations?

☐ Which three features are must-haves?

2 · PRICING MODEL AND TRUE COST

☐ Is the price per user, per account, or per location? Multiply it out for my team.

☐ Is the headline price annual billing? What is the month-to-month price?

☐ Is it an introductory or promotional rate? What does it renew at?

☐ Which features I need sit on a higher plan than the one advertised?

☐ Are SMS, extra calendars, resources, or a BAA sold as add-ons?

☐ Are there platform fees on payments on top of card processing fees?

3 · FREE PLANS AND TRIALS

☐ Can the free plan actually accept bookings?

☐ Caps: users, event types, calendars, bookings per month?

☐ Does the free plan add vendor branding to my page or emails?

☐ Does the trial need a card, and does it auto-convert to paid?

4 · BOOKING EXPERIENCE

☐ Does calendar sync work both ways (Google, Outlook, Apple) on my plan?

☐ Can I set buffers, minimum notice, and daily limits?

☐ Email reminders only, or SMS too — and is SMS limited by country?

☐ Can clients reschedule and cancel on their own?

☐ Can I embed the page on my site and use my own domain?

5 · PAYMENTS AND NO-SHOWS

☐ Which processors are supported (Stripe, PayPal, Square, LawPay)?

☐ Can I take a deposit or prepayment, and charge a no-show fee?

☐ Can I sell packages, memberships, or gift cards?

☐ Who handles refunds when I cancel?

6 · PRIVACY, HIPAA, AND DATA

☐ Patient data? Will the vendor sign a BAA, on which plan, covering what?

☐ Does the vendor’s own documentation say not to submit health data?

☐ What do reminder texts and emails include? Keep sensitive details out.

☐ Law firms: does intake collect only what is needed before a conflict check?

7 · TEAM AND INTEGRATIONS

☐ Is round-robin or collective booking on my plan?

☐ Does it connect to my CRM, video tool, and Zapier on my plan?

☐ Who is admin, and can I control what staff see?

8 · CONTRACT AND EXIT

☐ What is the cancellation notice period, and is there a refund window?

☐ Can I export clients and booking history?

☐ Did I confirm every price on the official pricing page today?

My shortlist

Tool · plan · monthly cost × users = total

Free cost math for 11 tools at official list prices: schedulecompared.com/scheduling-software-pricing-calculator · 2026 pricing report: schedulecompared.com/scheduling-software-pricing-report-2026 · This checklist is general guidance, not legal advice. Always confirm prices and terms on the vendor’s official pages.