Bookings

November 3, 2022

Updated: October 9, 2023

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MICROSOFT BOOKINGS

INTRODUCTION

Microsoft Bookings lets you track, manage and organize your appointments and calendars all in one place. **A bookings calendar integrates with your personal Outlook calendar** so there are no conflicting dates/times. Create a calendar for each event for customers to schedule and re-schedule.

ACCESS BOOKINGS

First time access

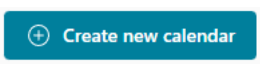
1. Go to **portal.office.com** and login is prompted.
2. In the **search bar** at the top, type **bookings** and then choose bookings from the list below. The Bookings homepage opens showing any Booking calendars you have created in the past.

After accessing the first time

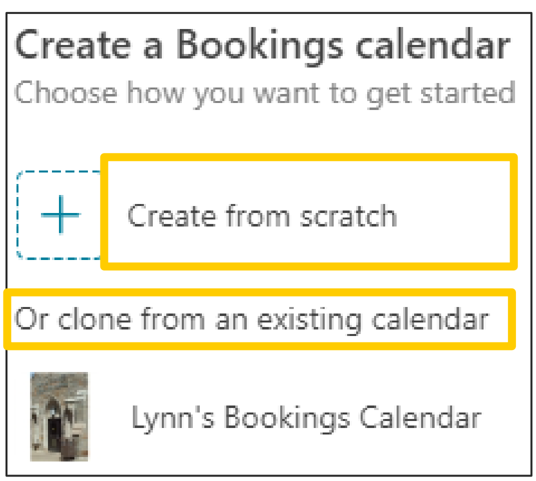
3. You can search or select another booking calendar from the Bookings homepage.

CREATING A NEW BOOKING CALENDAR

FROM THE BOOKINGS HOMEPAGE

1. Click the 

button located on the right side of the homepage.
2. You can choose to create a new calendar **from scratch** or **clone** another calendar.

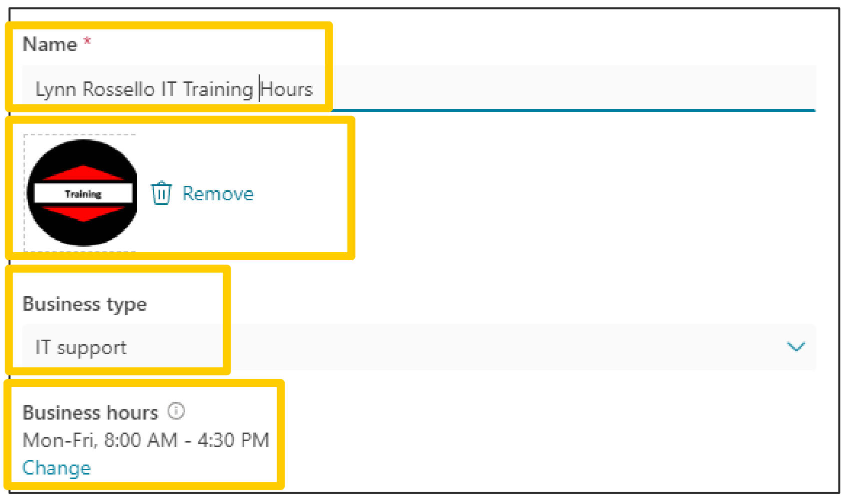


CREATE FROM SCRATCH

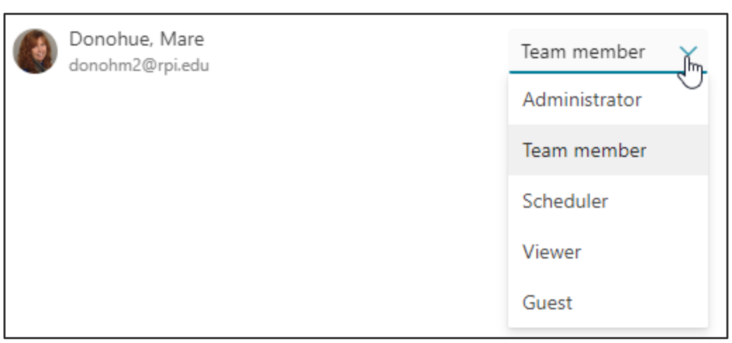
1. Click **Create from scratch**.

The Create a new Bookings calendar screen appears.

2. Add a **Business name**, **logo**, **Business type** and **Business hours**.
    - **Business name** – Type the name of your calendar
      NOTE: Keep in mind that this name will create the email address for sending booking invites (e.g. businessname@domain.com) and booking page link (e.g., https://book.ms/b/buisinessname@domain.com)
    - **Logo** – save image as a .jpg, jpeg.
    - **Business type** – choose the drop-down arrow to the right for different selections.
    - **Business hours** – Hours of the business. You can add closures, time off and vacation time once the calendar is created.



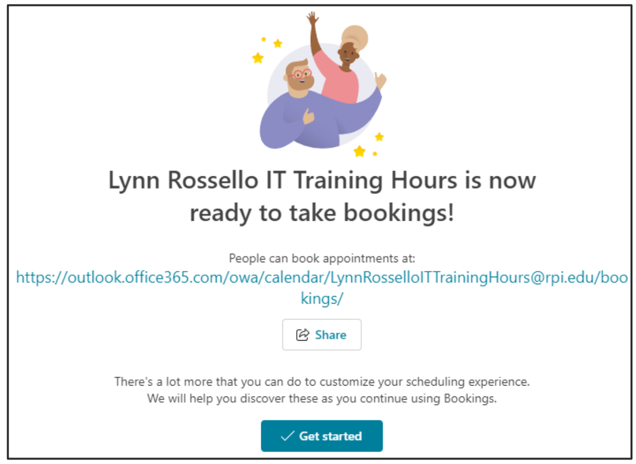
3. Click **Next**.
4. **Invite staff** who will need access to this calendar and **designate their role**.



5. Click **Next**.

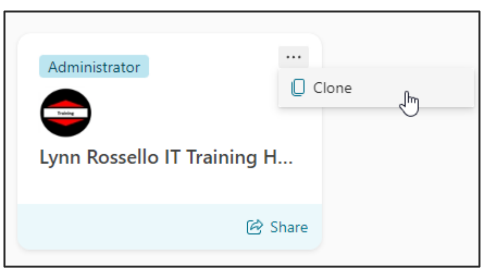
6. **Set up a service** – What days and hours will you or team be available? Will this be a Team meeting?
7. Click **Update service**
8. **Add more services**, or just click **Next**.
9. **Choose who can book appointments** – No self-service (can only book from the bookings app), People in my organization, or Anyone can schedule.
10. Click "**Create calendar**" and a message appears stating the calendar is being setup.

- An email is sent to you stating that the calendar was created and that you are the Administrator.
- The Bookings screen shows a shared link for the new calendar.

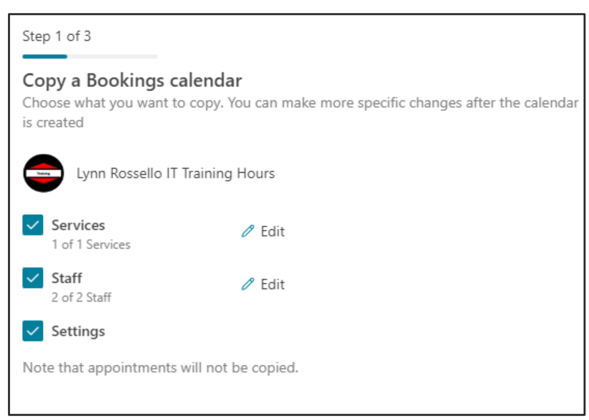


CLONING AN EXISTING CALENDAR

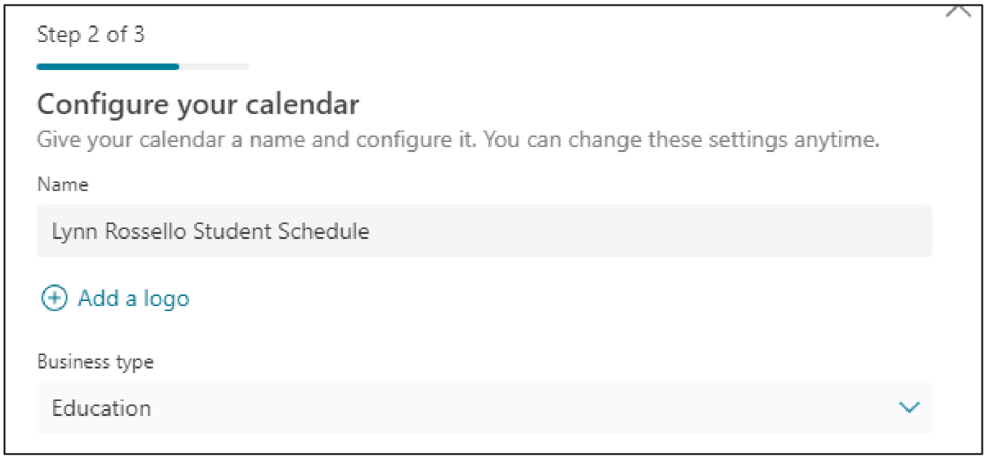
1. From the Bookings homepage, locate the calendar you want to clone and click the **. . . three dots in the upper right corner** of the calendar icon and choose **Clone**.



2. The Copy a Bookings calendar screen is where you can Edit Services, Staff and Settings for the new cloned calendar.
3. Click **Continue**.

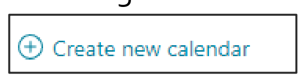


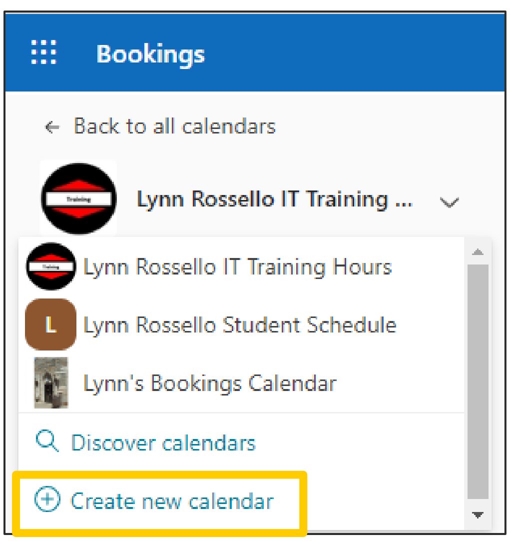
4. **Rename the Calendar** and change the **Business type**.



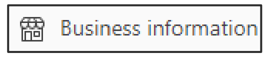
5. Click **Continue**.
6. Choose **who can book appointments**.
7. Click **Create Calendar** and once the calendar is setup, you will receive an email and the shared link screen appears in the booking app.

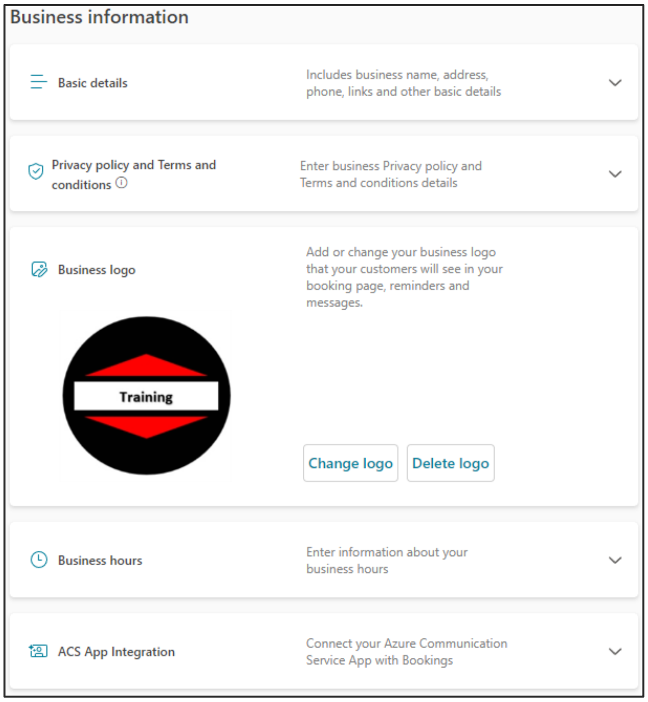
CREATING A CALENDAR WHILE VIEWING ANOTHER CALENDAR

1. While viewing a calendar, click the **drop-down arrow** to the right of the name of the calendar on the left side navigation pane and choose 



ENTER YOUR BUSINESS INFORMATION

1. From the navigation pane on the left, click 



2. On the **Basic details** section, complete your business name, address, phone, URL link (homepage for your business, i.e. http://rpi.edu/)and other basic details.
3. Under Business logo, you can **change or delete a logo**.
4. Hours can be changed under Business hours section. **Click + to add start- and end-time selectors**.

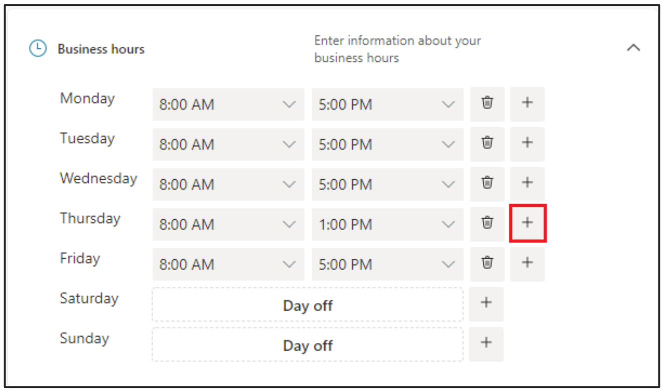
How to set hours for a split shift **(information directly from link below)**
(https://learn.microsoft.com/en-us/microsoft-365/bookings/enter-business-information?view=o365-worldwide)

You might need to block out a portion of each day or week to have staff meetings, update inventory, or take care of other rhythm-of-business details. The Bookings app allows you to limit customer appointments to your specified time slots.

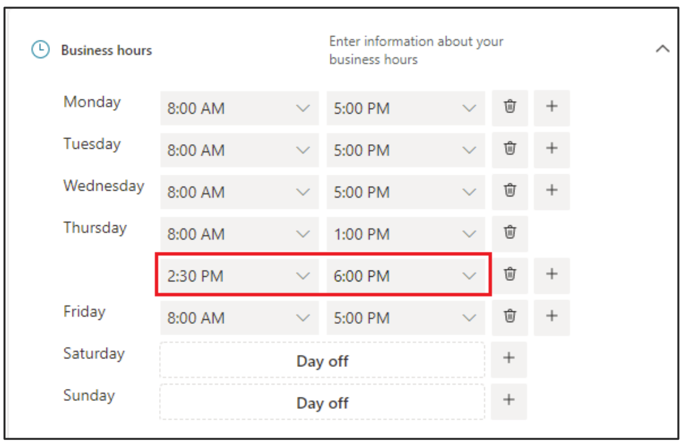
For example, you have staff meetings every Thursday from 1 o'clock to 2:30 and want to block out that time so all of your staff members can attend. To do this:

1. On the Business information page, under Business hours, select a start and end time for Thursdays. In this example, we'll set 8:00 a.m. to 1:00 p.m.

2. Select **+** to create a new row for Thursday.



3. In the new row, select 2:30 p.m. for the start time and 6:00 p.m. for the end time.



4. Select **Save**.

When a customer goes to your booking page, he or she will see that your business is closed from 1 to 2:30 on Thursdays.

5. Click **Save** at the top when you are finished setting up your business information.

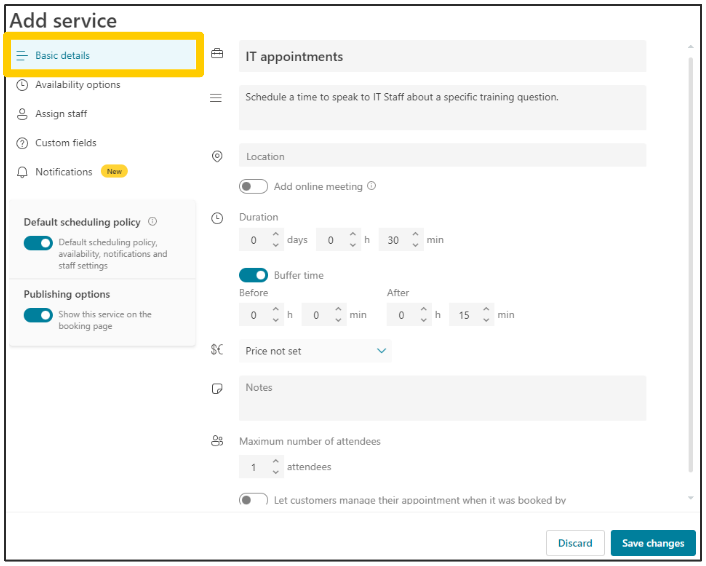
BOOKINGS SERVICES SETUP

Once Services is set up, customers go to your business web site to book an appointment, they can see exactly what types of appointments are available and choose the staff member they want to schedule with. For example, in education, services can be Office Hours, Tutoring, On-line Meeting, In-Person Meeting

You can also add customized information and URLs to the email confirmation and reminders that you send when someone books a date/time through your booking page.

1. Open **Your calendar** and then click **Services** on the left navigation pane.
2. Select **Add new service**.
3. At the **Basic details** page add a name of your service. i.e. ***Student Appointments***

BASIC DETAILS



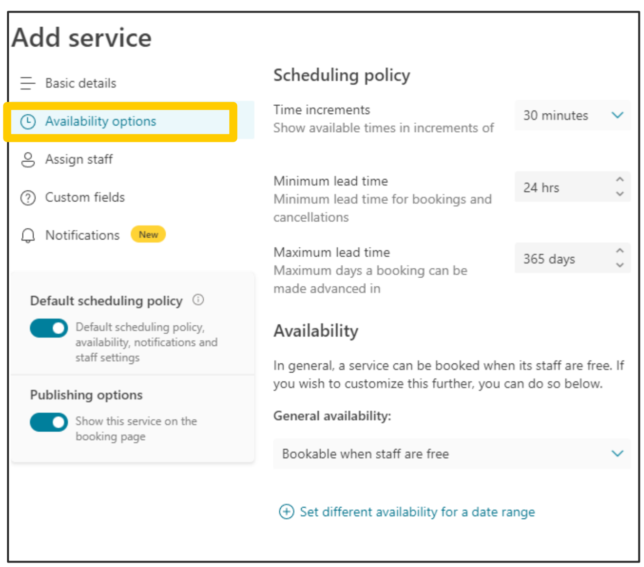
Service name	Enter the name of the service that will appear in the drop-down menu on the Calendar page. As well as a tile on the Self-service page.
Description	This description will appear when a customer clicks the information icon on the Self-service page.
Default location	This location is what will be displayed on confirmation and reminder emails for both staff and customers, and it will be displayed on the calendar event created for the booking.
Add online meeting	Enables or disables online meetings for each appointment, using via Teams or Skype depending on which one you configure as the default client for the staff member. **If Enabled:** - A link to a Teams or Skype meeting, unique to the booking, will be added to the calendar event on both the staff's and the customers' calendars, along with dial-in information. - The link to join the meeting will be added to all confirmation and reminder emails. **If Disabled**: - Appointments will not contain any meeting options.
Duration	This is how long all meetings will be booked for. The full appointment time will be blocked on the staff's calendars.
Buffer time	Enables extra time to the staff's calendar every time an appointment is booked. For example: set 15 min after the scheduled appointment for staff to do follow up from the appointment before.

Price not set	This will not be used. If **Price not set** is selected, then no price or reference to cost or pricing will appear.
Notes	Internal note to staff. Field appears in the booking event for booked staff, as well as on the event that appears on the Calendar tab in the Bookings web app.
Maximum attendees per event	Allows you to setup services that require the ability for multiple people to book the same appointment time with the same staff member (ex: Training or fitness class) Keeps booking until max is reached. Current appointment capacity and attendees can be viewed in the Calendar tab in the Bookings Web app.
Let the customer manage their bookings	This setting determines whether or not the customer can modify or cancel their booking, provided it was booked through the Calendar tab on the Bookings Web app. **If Enabled** customers can: - Reschedule, Cancel or schedule a new booking. If Disabled customer cannot: - Reschedule, Cancel or schedule a new booking. NOTE: When booking through the Self-Service page, however, customers will still have the **Manage Booking** button and all of its options, even when this setting is disabled. We recommend disabling this setting if you want to limit access to the Self-Service page. Additionally, we suggest adding text to your confirmation and reminder emails that tells your customers how to make changes to their booking through other means, such as by calling the office or emailing the help desk.

Go to this link to view images of: Email Confirmation bookings and Text message notifications (if being used)
https://learn.microsoft.com/en-us/microsoft-365/bookings/define-service-offerings?view=o365-worldwide

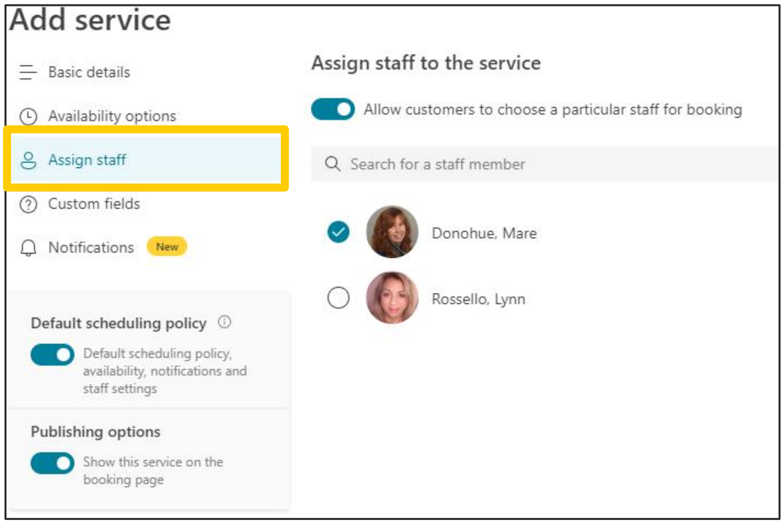
AVAILABILITY OPTIONS

Shows the options you've selected from your **Booking page** for your scheduling policy and availability for your staff.



ASSIGN STAFF

Select the staff that customers will be able to Book with.

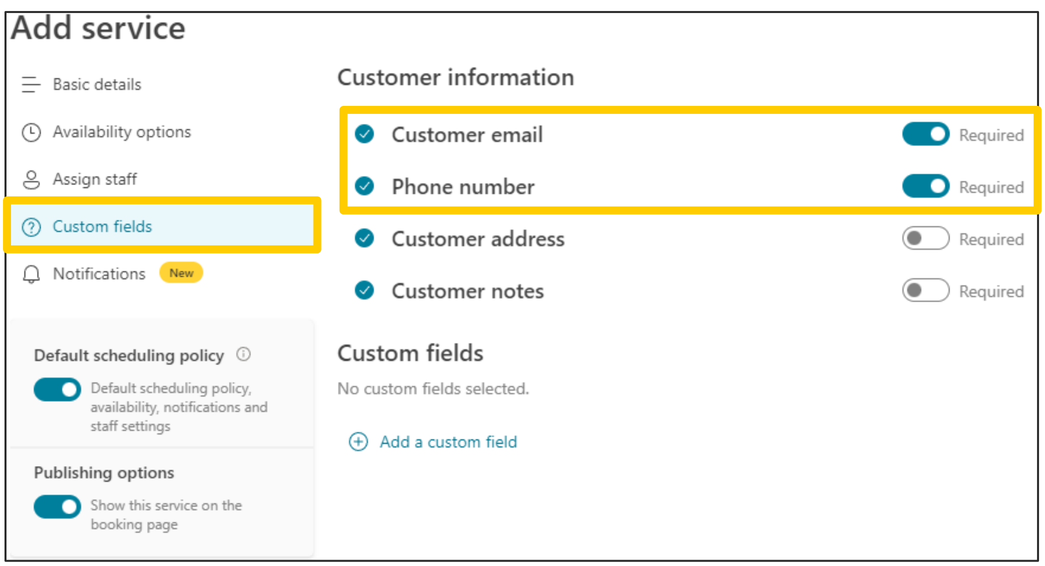


CUSTOMER FIELDS

Custom fields can be useful when collecting information that is needed every time the specific appointment is booked.

Example below will show Customer email and Phone number as custom fields that will appear on the Booking page when your customers book appointments with you and your staff.

Customer email, phone number, address, and notes are non-removable fields, but you can make them optional by deselecting **Required** beside each field.

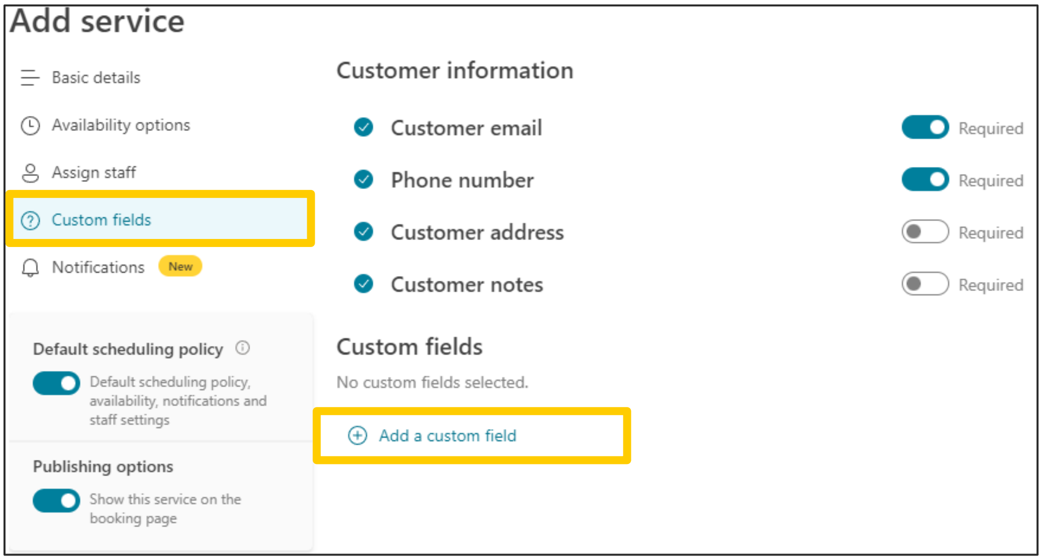


ADDING A CUSTOM FIELD

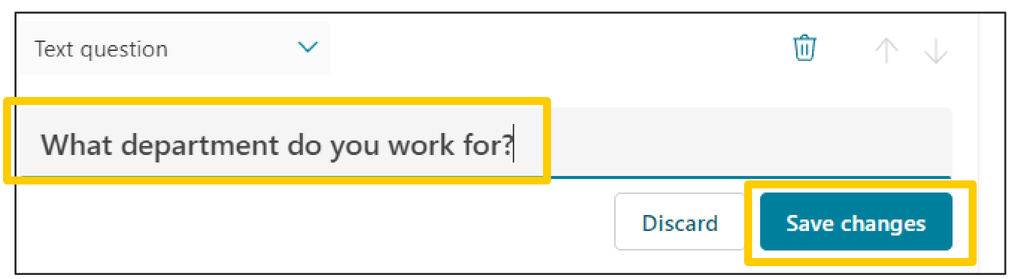
A custom field is a field you create to gather specific information before the booking. For example, you can ask a question like "What would you like to discuss during your appointment?" or "What department are you from at RPI?"

While in the Add service screen or while editing a service:

1. Click **Custom fields** on the left navigation bar.
2. Click **Add a custom field**.

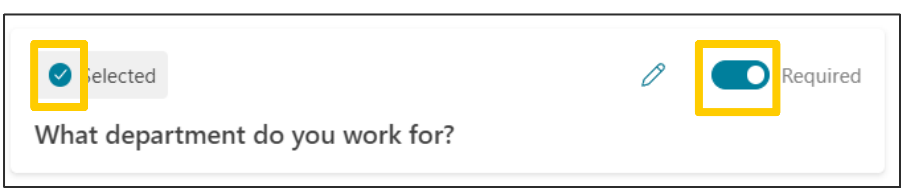


3. **Type your question**, and then click **Save changes**.



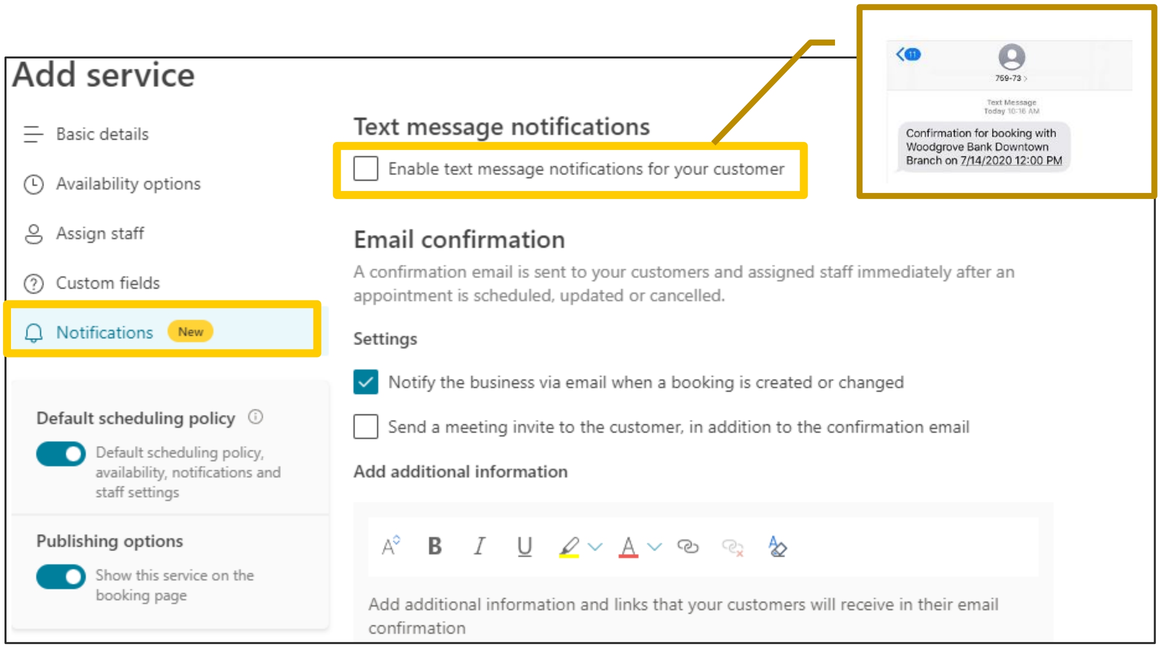
To use the question(s):

1. Click **Select** and move the slider to **Required**.



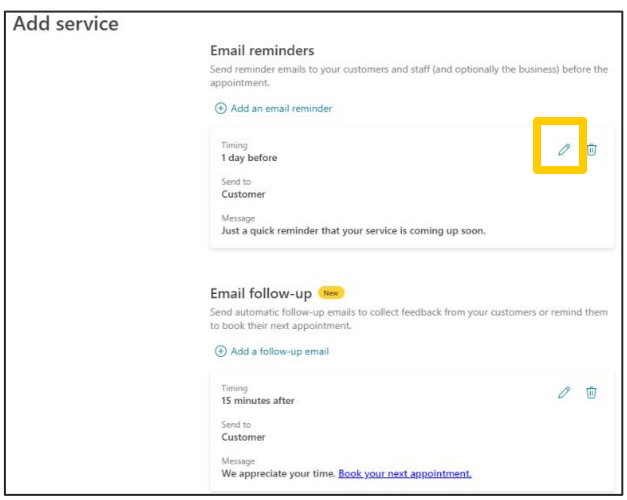
NOTIFICATIONS

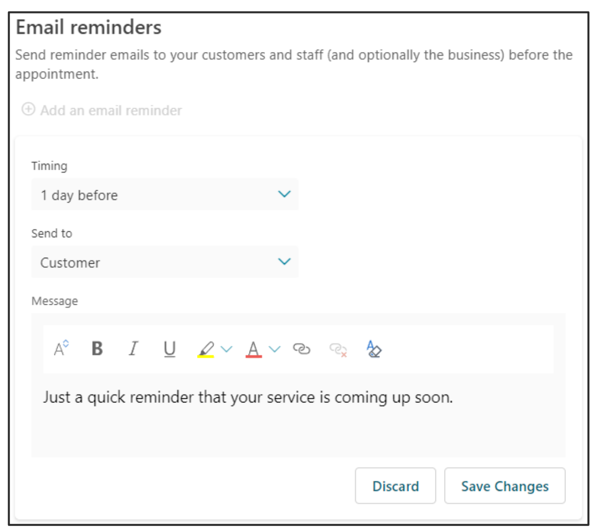
Check **Enable text message notifications for your customer** to send a text message confirmation of the booking to the customer.



EMAIL REMINDERS

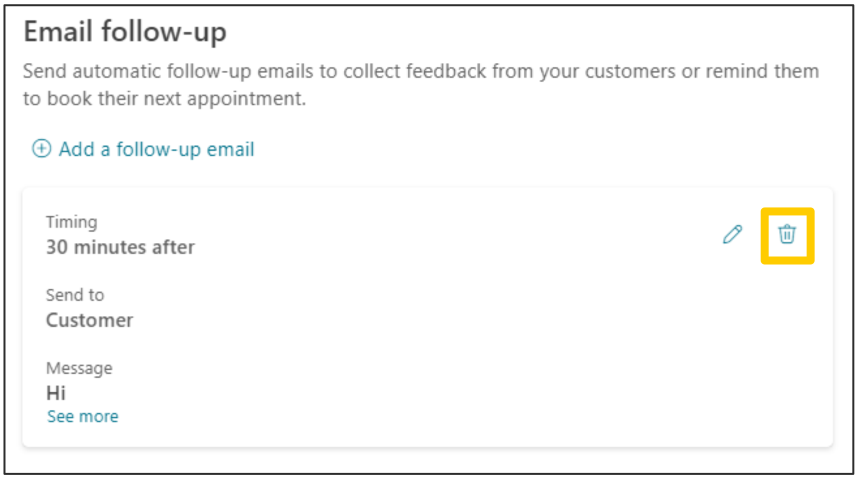
Email reminders default – customers receive a reminder 1 day before the appointment, but this can be changed. Click the "Pencil icon" make the change and then click Save Changes.





Email follow-up – this sends an automatic follow-up email to collect feedback from the appointment or to remind them to book their next appointment.

NOTE: Choose DELETE if you do not want this to automatically be sent.

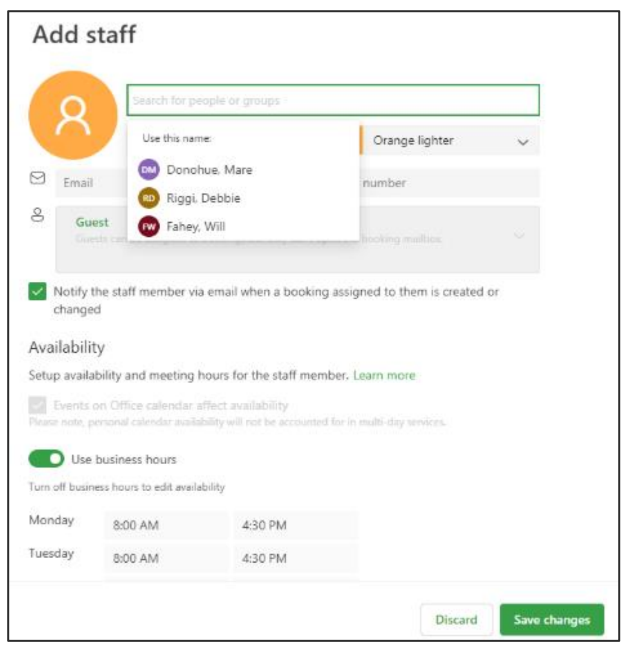


4. Once all the selections are made, click **Save changes** at the bottom of the notifications screen.

ADDING STAFF TO BOOKINGS

This section is where you create and manage your staff list which includes details such as name, phone number, and email address as well as set their working hours.

1. Open a calendar from the homepage.
2. Choose **Staff** from the left navigation pane.
3. Click [Add new staff] and the Add staff screen appears.
4. Begin typing the first staff members name in the search area and select them from the list below. The other fields will automatically populate. **NOTE**: Manually complete email address and other information for those **outside your organization**.



5. **Select a role** for each staff member.

   Staff Roles

   Administrator - can edit all settings, add and remove staff, and create, edit, and delete bookings. This role should be assigned to whoever you want to manage the calendar for everyone. This person will be able to change appointments, update availability and time off, update services, etc.

   Scheduler – manages bookings on the calendar and customer details. Read-only access to settings, staff and services.

   Team member – manages bookings on their own calendar and their availability in the booking mailbox.

   Viewer – Can see all bookings on the calendar but cannot modify or delete them. Read-only access to settings.

   Guest – assigned to bookings, but they can not open the booking mailbox.

6. Select **Notify the staff via email when a booking assigned to them is created or changed** so staff receives emails.
7. Select **Events on Office calendar affect availability** if you want the free/busy information from staff members calendars to impact availability for bookings services through Bookings. **NOTE**: this is strongly recommended to be selected and is the default to avoid double-booking.
8. **Use business hours** to set all bookable times for your staff using the Business hours set on the Business Information page. **OR** if you deselect this, a staff member who only works certain days and hours can make the changes.

   NOTE: Bookings supports up to 100 staff members in a Bookings Calendar

9. Click **Save changes**.

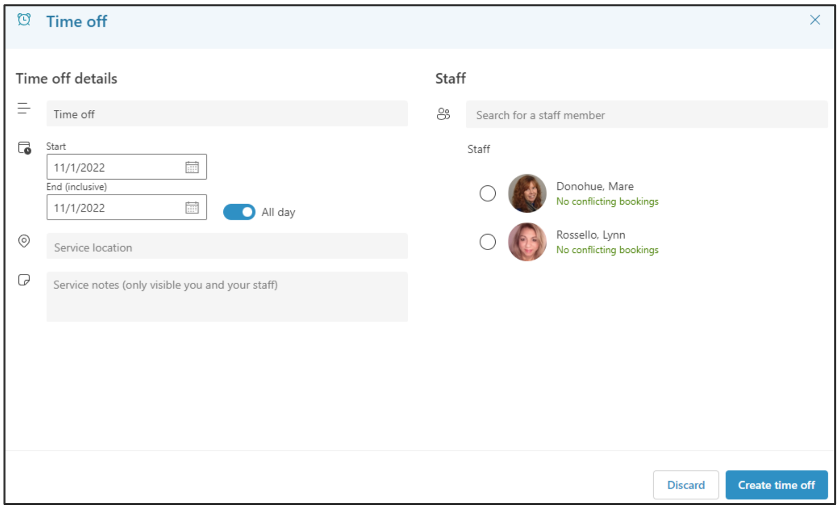
SCHEDULING BUSINESS CLOSURES, TIME OFF AND VACATION TIME

On occasion, you will want to close your business for holidays or team events, or when your staff need time of for vacation, or unavailable unexpectedly or when they are sick. You can indicate these changes from any calendar in Bookings using the "Add time off" feature. Once the business reopens or employees return to work, everyone will be listed on the booking page according to their established work hours.

BUSINESS CLOSURE

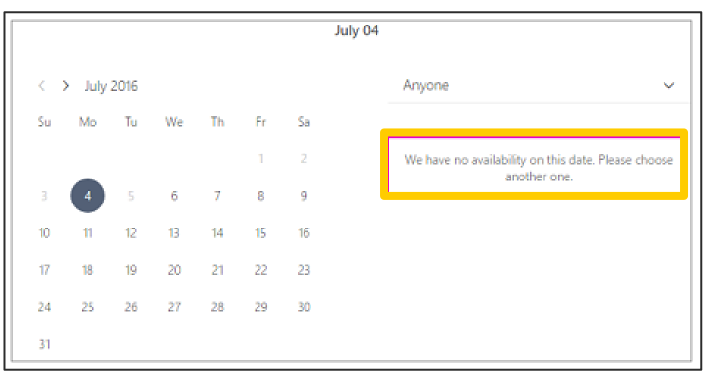
1. While in a calendar, select 

located in the toolbar at the top of the calendar.



2. Complete the **details**, including **title**, **start**, and **end date and times**, **location** and **extra notes**.
3. Select **Add day** event.
4. Select **all staff members**.
5. Click **Create time off**.

When a customer attempts to schedule an appointment on a day the office is closed, they'll see a message on the booking page that there is no availability.



TIME OFF

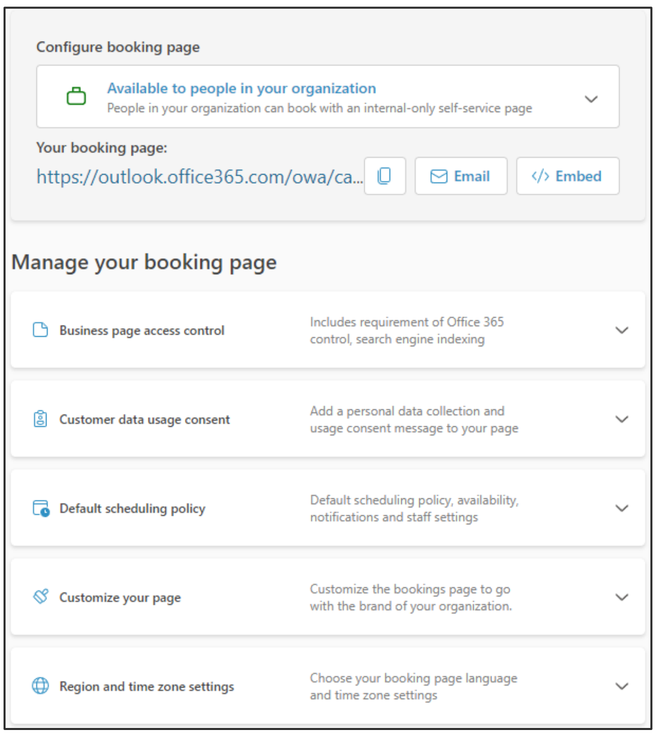
1. While in a calendar, select Add time off located in the toolbar at the top of the calendar.
2. Complete the details, including title, start, and end date and times, location and extra notes.
3. **Select the <u>staff member</u>** or **<u>members</u>** who are taking the time off.
4. Click **Create time off**.

SETUP AND PUBLISH YOUR BOOKING PAGE

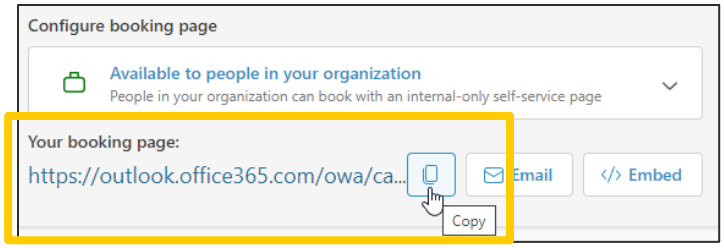
The Booking page is your customer-facing, web-based appointment calendar that your customers will use to book appointments with you.

1. While in the Bookings App, **choose your calendar** to open.
2. From the left navigation pane, select **Booking page**.

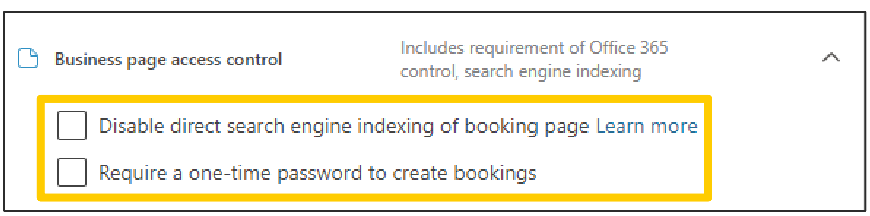
The **Configure booking page** appears and gives you information to setup and publish your page. https://learn.microsoft.com/en-us/microsoft-365/bookings/customize-booking-page?view=o365-worldwide



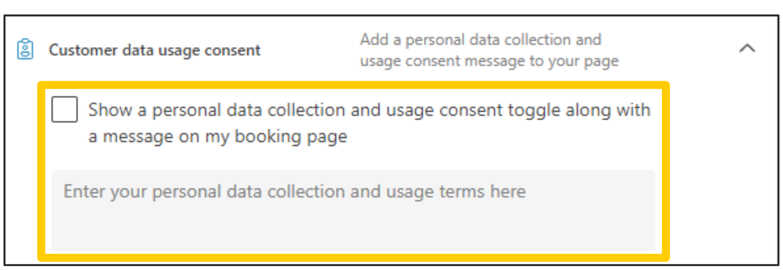
- **Configure booking page** – Publish your calendar live to make your calendar ready for scheduling. You can share the link to your calendar via email, Twitter, and add a **Book Now** button to a Facebook page. The link can also be embedded in your organization's Web site.



- **Booking page access control** – You'll be able to control whether your Bookings page can be indexed by search engines. By default, your Bookings page will be indexed, but you can now hide Booking pages from search engines.
  - **Disable direct search engine indexing of booking page** This option prevents your page from appearing in the search results for Google, Bing, or other search engines. Selecting this box will ensure access to the page is limited to the generated page link.
  - **Require a one-time password to create bookings** – Some HIGHLY suggest checking this off as this will **send a code to the email of the person scheduling** the appointment with your team. They will then have to enter the code before finalizing the booking, which should prevent scheduling SPAM from filling up your calendar with fake appointments.

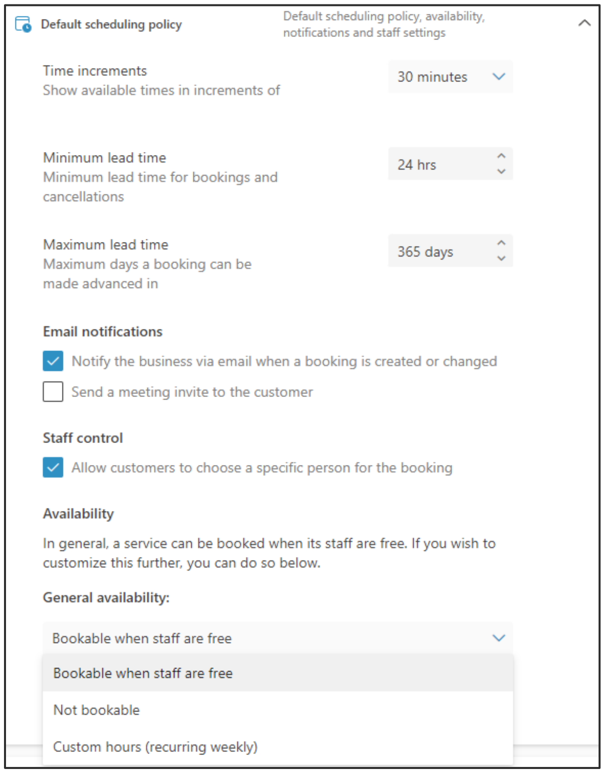


- **Customer data usage consent** - When selected, text requesting the user's or customer's consent for your organization to use their data will appear on the Self-Service page. The box will have to be checked by the user in order to complete the booking.

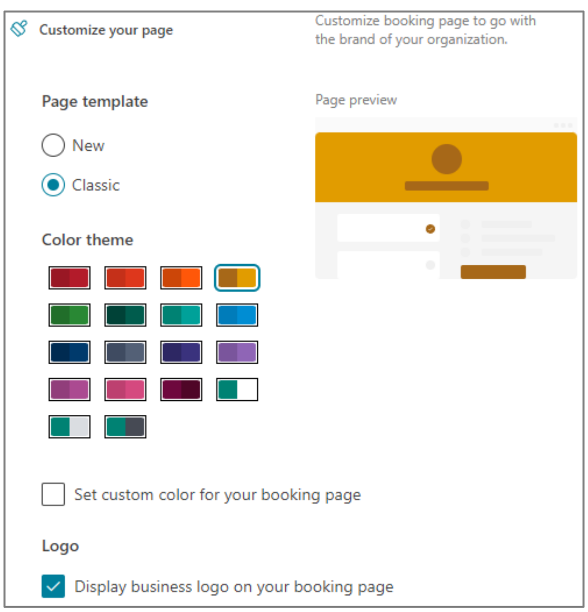


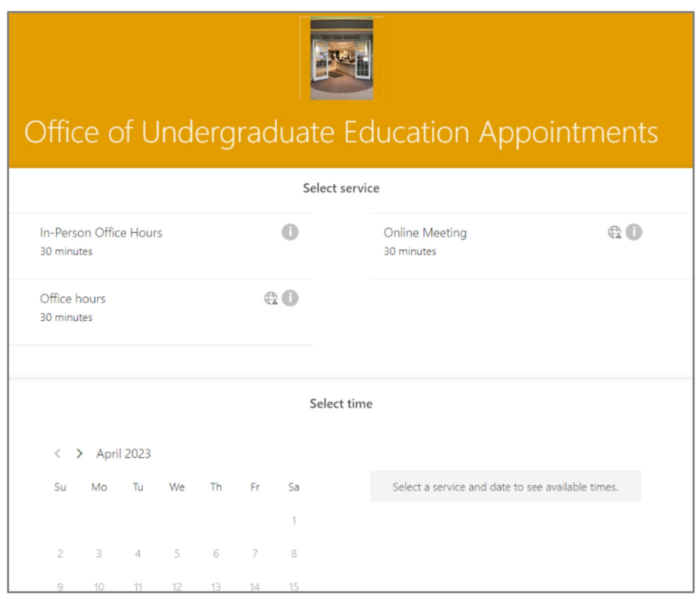
- **Default scheduling policy, Email notifications, Staff control** - All of these settings are like the ones available for each service on the Services tab.

- **Availability** – Customers book when the staff is free. **General Availability** – Use this option to customize. Default is "*Bookable when staff are free*" and the **Availability** option here can be changed during holidays or extended hours.



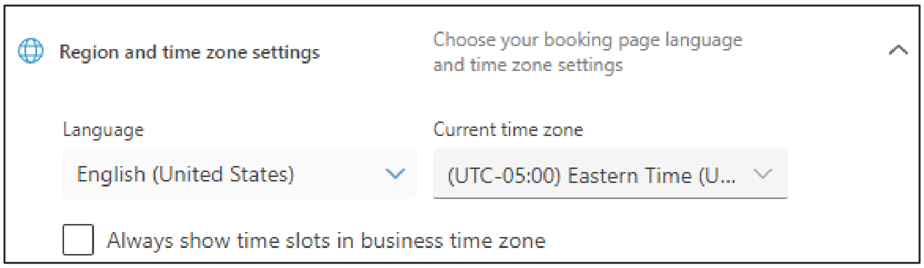
- **Customize your page** - Choose colors and logos that appear on the Self-Service page, ex: for brand consistency.



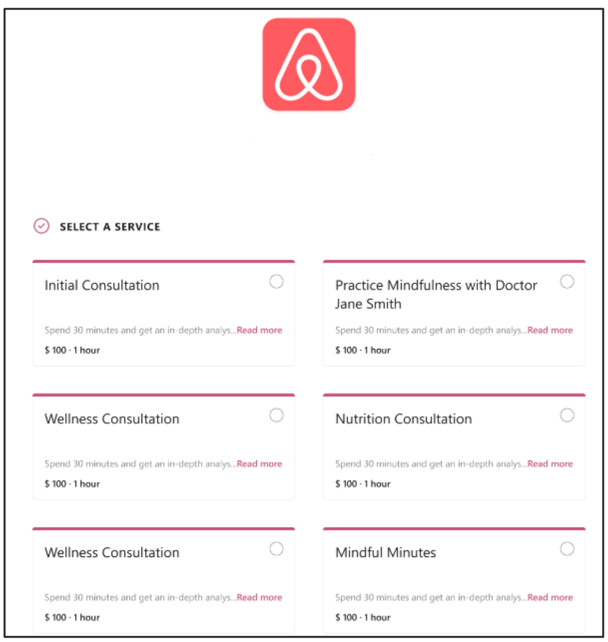
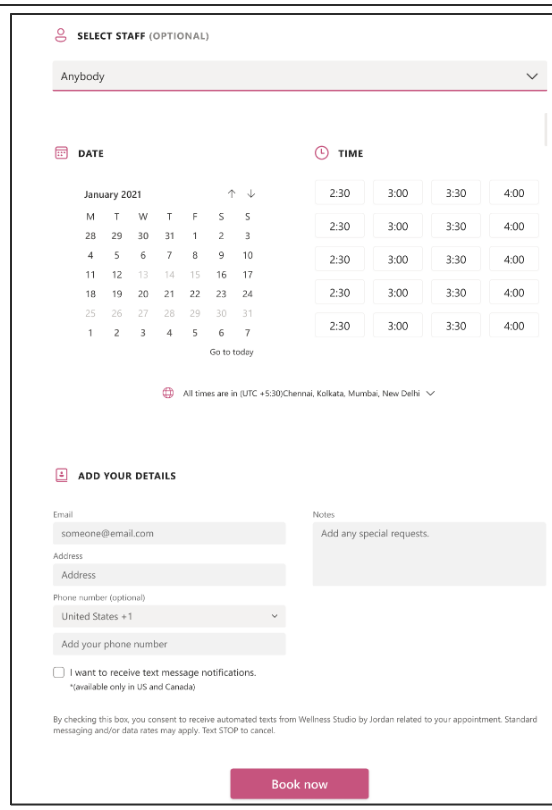


- **Region and time zone settings** – Set your time zone and language preferences for the Self-Service page. Recommendations is to set your local time zone. For visitors to your Self-Service page, Bookings automatically detects their local time zones and will show availability to them in their own time zones.

  For **example**, if an appointment is available at 1:00pm PST, someone in CST will see the available time displayed as 3:00pm CST.



Once you publish your booking page, customers will see your booking page where they can book appointments with you.

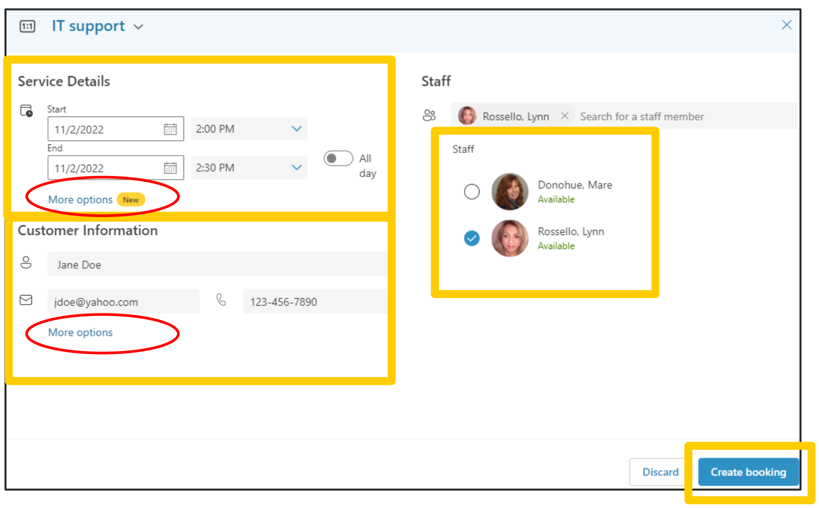
<table>
<tr><th>Example of a booking page below is for a Wellness Center:</th><th>Example of what a service looks like when selected:</th></tr>
<tr><td>
</td><td>
</td></tr>
</table>

CREATING A MANUAL BOOKING

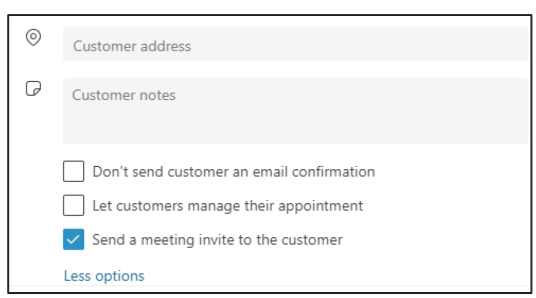
There are two different ways Bookings can be scheduled and staffed. The first way is that a customer can schedule from the standalone booking page or an embedded booking page on your website. The second way is for you or one of your employees to enter the bookings manually, such as when a customer calls or emails for an appointment.

1. Open a Bookings calendar.
2. From the navigation pane on the left, click **Calendar**.
3. Select 

4. **Complete** the **date/time**, **customers information**, including **name**, **email address**, **phone number**.
5. Click **More options** to see more fields to other relevant details.
6. **Choose the staff member** to provide the service. Only Staff members that were setup on the services page will show in the new booking window.

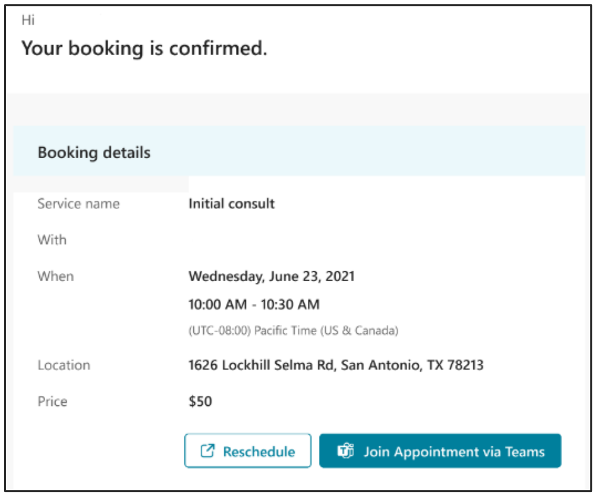


- Click **More options** under the <u>Service Details</u> to **Add an email reminder** and to **Add a follow-up email**.
- Click **More options** under Customer Information to **add Customer address and notes**.



7. Click **Create booking.**

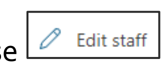
Here's an **example** email of the reminder your customer will receive:



ADDING EMPLOYEES WORK HOURS

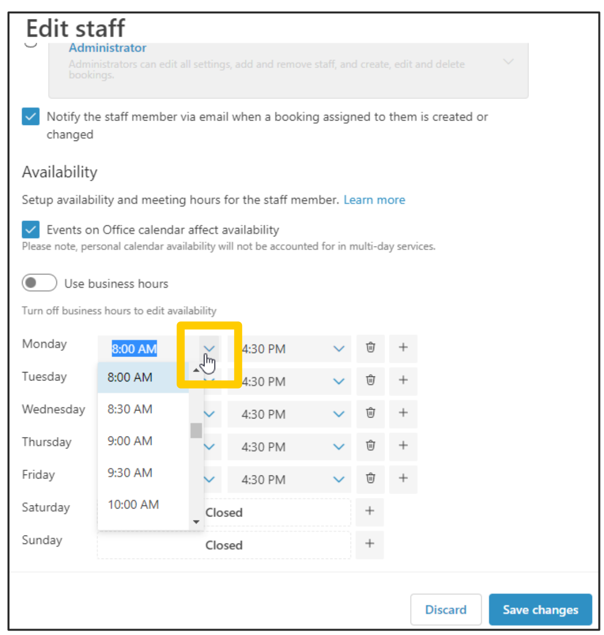
By default, each employee matches the business hours that were established in the Bookings app. It is important to make sure that an employee's working hours are accurately set to ensure they are available when a customer tries to book them.

The Staff page customizes your employees working hours to match the needs of the business.

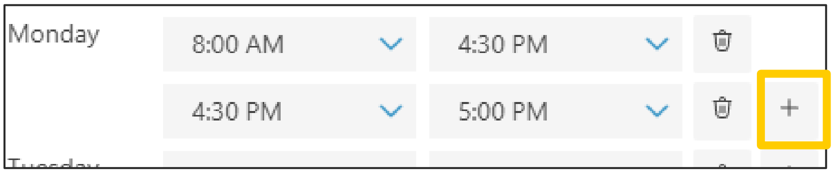
1. While in the Bookings app, **choose your calendar**.
2. Click **Staff** from the left navigation pane.
3. Select the staff member whose hours you want to set and then choose  next to the employees' picture at the top.

4. On the Edit staff screen, **clear the Use business hours area** by moving the slider to the left. Click the drop-down arrows to select start and end times for each day.

   Times are in 15-minute increments.



5. Select **+** to add start and end time selectors. Depending on what day you choose, this adds another line with time under that day for morning and afternoon bookings.



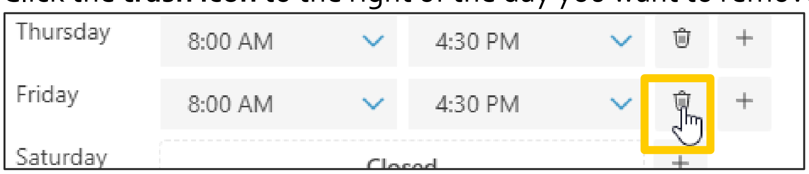
6. Click **Save changes**.

SET AN EMPLOYEE'S DAYS OFF

When an employee takes a day off, and the day/time is adjusted that employee will appear unavailable on the booking page. Customers using the booking page, will not be able to schedule with that employee on that day.

To remove a day(s):

1. Click the **trash icon** to the right of the day you want to remove.



NOTE: To **add the day back**, click the **+** to the right of the day.

DELETE A BOOKING CALENDAR

If you no longer need a booking calendar you will need to **Submit a Request** through itssc.rpi.edu and include in the request the **EXACT name of the booking calendar** and **that this is a Booking Calendar** as help desk staff will need to delete this through the **Microsoft 365 Admin Center**. https://learn.microsoft.com/en-us/microsoft-365/bookings/delete-calendar?view=o365-worldwide

MANAGE BOOKINGS IN MICROSOFT TEAMS

The Bookings app in Microsoft Teams offers an easy way to schedule in-person/virtual appointments. Those who schedule can manage department/staff calendars and communications with internal/external attendees with virtual appointments held using Microsoft Teams meetings.

NOTE: Only schedulers need to have the Bookings app installed in Teams. Staff who conduct or participate in virtual appointments will not need the app and can join from their Outlook/Teams calendar or from a Teams meeting link in the booking confirmation email.

ADDING BOOKINGS APP TO MS TEAMS

1. Open **Microsoft Teams**
2. Click the **Apps icon** 

from the left navigation pane.
3. On the search bar **type Bookings**.
4. Click once on Bookings from the list below and then click **Add**.
5. Click **Go to Virtual Appointments** located in the upper right corner.
6. Once the Virtual Appointments screen appears, click **Add**.
7. Choose **Connect a calendar** or **Create a calendar** if a Bookings schedule button appears.

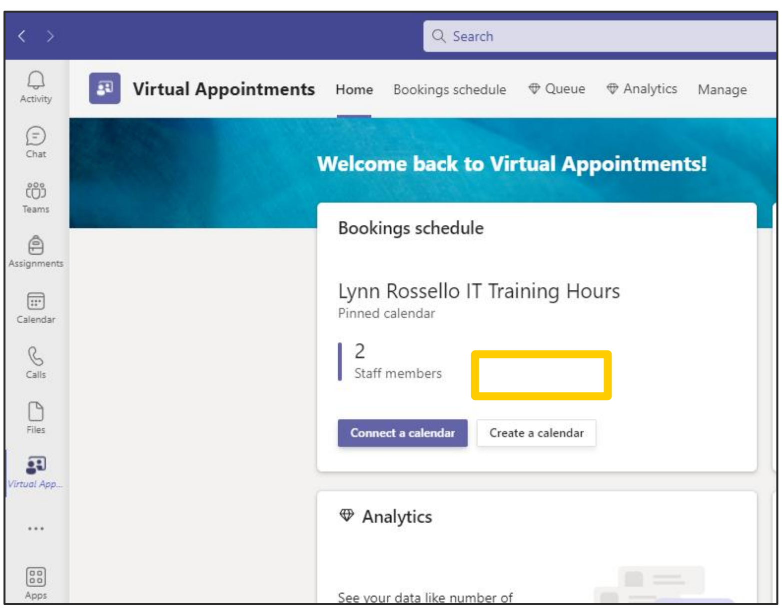
VIRTUAL APPOINTMENTS WITH TEAMS AND BOOKINGS

The virtual appointments are held through Microsoft Teams meetings and each virtual appointment includes a Teams meeting link that's sent to the attendees in email, where they join from a web browser or in Teams on any device.

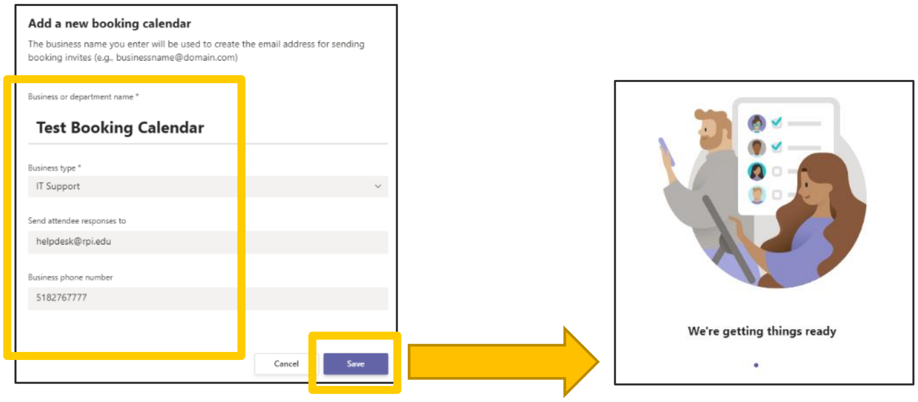
https://learn.microsoft.com/en-us/microsoft-365/frontline/bookings-virtual-visits?view=o365-worldwide

CREATE A CALENDAR

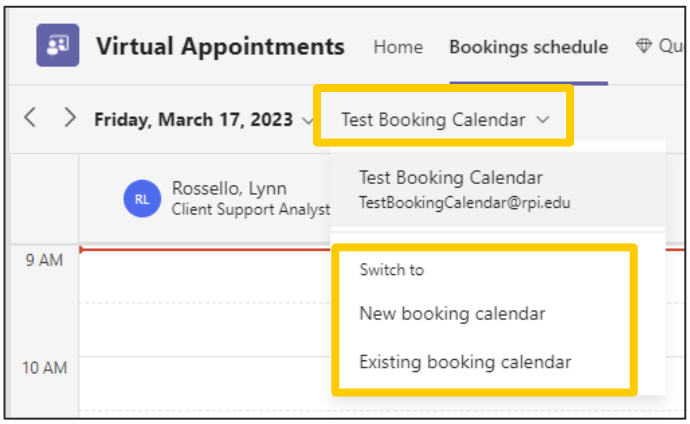
1. Click **Create a calendar**.



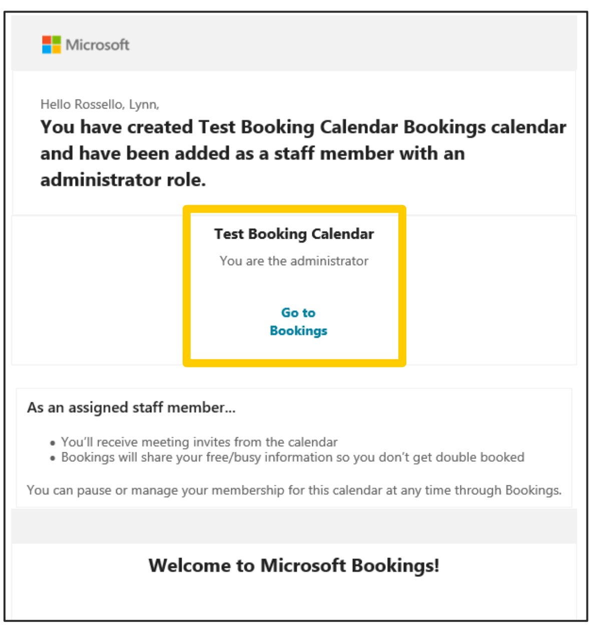
2. Type a **Business name**, choose a **Business type**, add an **email address for attendee responses** and a **Business phone number**. Click **Save**.



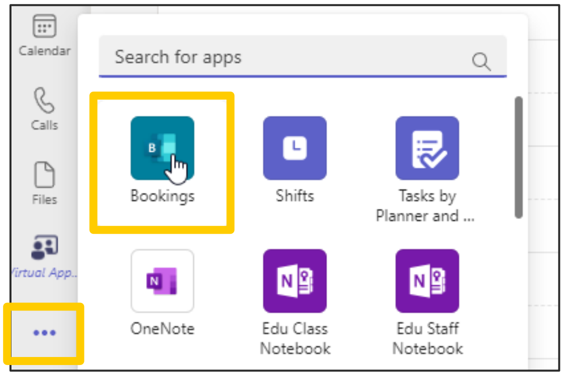
At the top the new bookings calendar appears. **NOTE**: You can click the drop-down arrow to the right of the new bookings calendar to switch to other booking calendars.



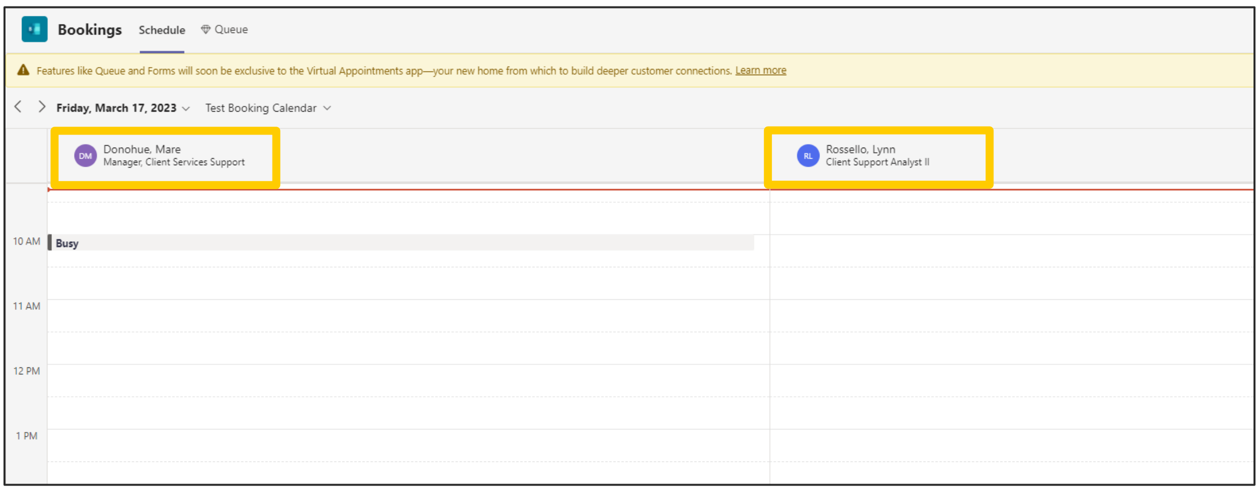
An email is sent with the name of the new booking calendar and a link to Bookings.



You can also click on the **... three dots** from the left navigation pane and click **Bookings** to open the Bookings App within the Teams window.

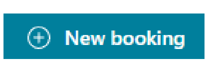


The Bookings calendar appears in the MS Teams window. **Showing availability of each staff assigned** to that service.



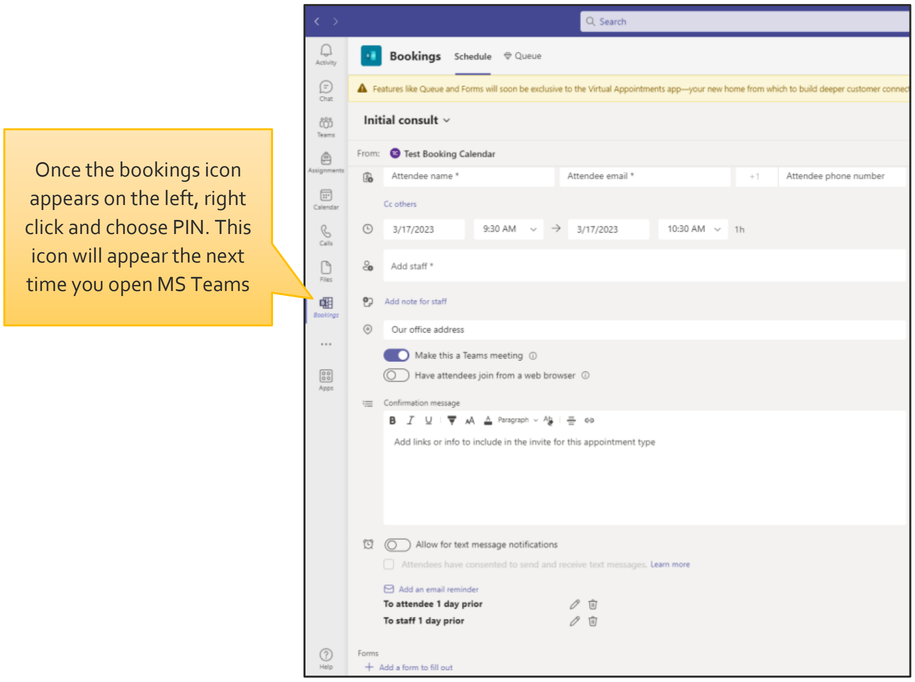
SCHEDULE A BOOKING IN THE TEAMS BOOKINGS APP

After you schedule a booking, a Microsoft Teams Meeting link is automatically added to the email sent to attendees and staff. What's great about Teams video meetings is that attendees can join from any computer or mobile device, whether or not they have a Teams account.

1. Open MS Teams and with a Bookings calendar on the screen.
2. Select 

located in the upper right corner **<u>OR</u>** click on a time within the calendar on the screen.

The new **Bookings** window appears.



3. Type the **Attendee name** and **email**.
4. Edit the **date/time** if needed.
5. Click **Add staff *** and select the staff member from the list below and notes if the staff member is **free**.

6. **Add a note for the staff member** if needed.
7. **Add a location** if this will not be an online meeting.
8. You can select to have the attendee join from a web browser.
9. **Add a confirmation message** to the attendee.
10. Select if you **want them to receive a text message**. You will need to note the attendees phone number at the top. **NOTE**: Attendees have to acknowledge a consent.

11. Click **Add an email reminder** if you want to send an email reminder or click **Done**.
12. **Add a form to fill out** – **IF A FORM was created a head of time**, you can add this.

13. When all the relevant information is added, click **Send**.

NOTE: The email confirmation sent to the attendee includes the meeting link and an attachment so that they can add the virtual appointment to their calendar. Staff also receive an email confirmation and meeting invite.

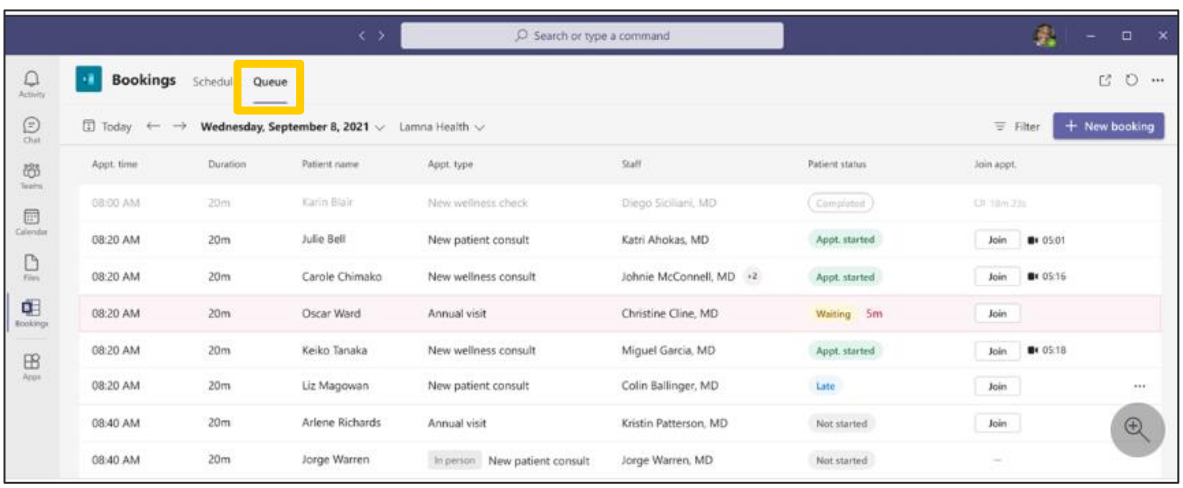
CONDUCT AND MONITOR APPOINTMENTS

Conduct appointments:

- In your **MS Teams** or **Outlook calendar**, go to the booking and then select **Join** or the **Teams meeting link** and select Join now.

Monitor appointments:

- Choose Bookings while in MS Teams and then click **Queue** at the top of the bookings bar.
- From the queue you can add a new booking, view relevant appointment details, and see appointment statuses.
- When someone enters an appointment, the status changes and wait time is displayed.
- Staff can join and manage the appointments directly from the queue.



TRAINING VIDEOS

The NEW Microsoft Bookings Sept. 2021
https://www.youtube.com/watch?v=ixybC9z8TrU
Microsoft Bookings tutorials -
https://www.google.com/search?rlz=1C1GCEU_enUS958US958&q=Microsoft+Bookings+tutorial+2022&sa=X&ved=2ahUKEwimwa_AoeP9AhUljokEHZcHCWoQ1QJ6BAgpEAE&biw=1920&bih=937&dpr=1
Bookings app in Microsoft Teams
https://support.microsoft.com/en-us/office/what-is-bookings-42d4e852-8e99-4d8f-9b70-d7fc93973cb5