

Bookings Calendar Tutorial

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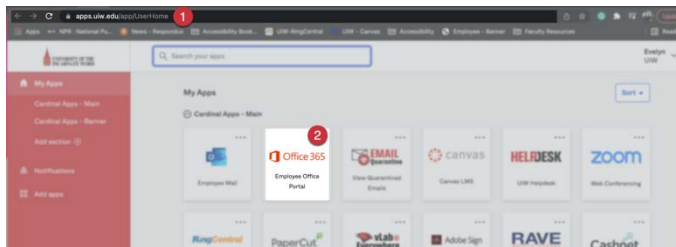
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Creating a Booking Calendar

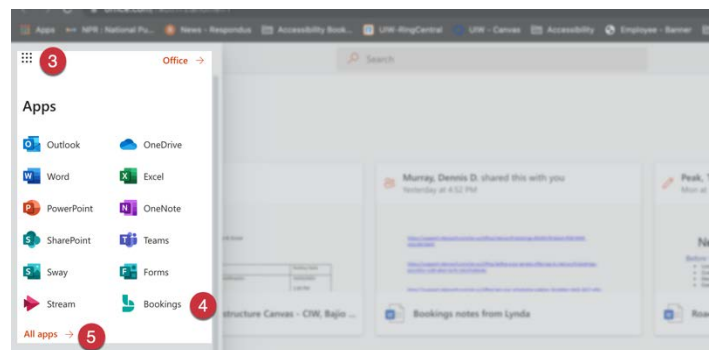
Microsoft Bookings is an online scheduling tool that allows customers to book appointments with you on an easy-to-use website. This step-by-step tutorial will teach you how to access Bookings, create your bookings calendar, share the Bookings calendar link, manage settings, and include a zoom link.

How to Access Microsoft Bookings

1. Log into **Cardinal Apps** <https://apps.uiw.edu>
2. From the Apps dashboard, select **Office 365**



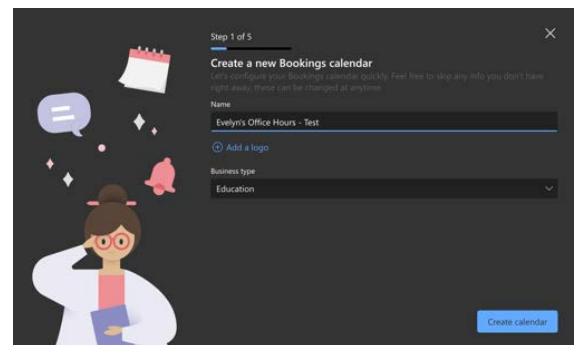
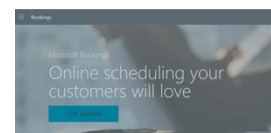
3. Once the Office 365 app loads, select the **App launcher** located at the top-left side of your screen
4. Select the **Bookings** app,
5. if the app does not appear in the menu, click All apps to find it.



Creating your Booking Calendar

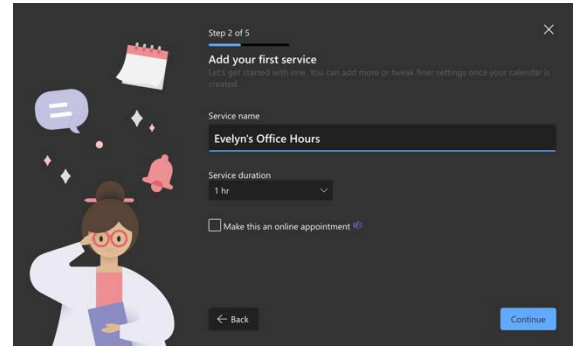
Step 1

1. Click the **"Get started"** button to start creating your Bookings calendar
2. Enter a **"Name"** for your Bookings calendar
3. Under the Business type field, select **"Education"** from the dropdown menu.
4. Click **"Create Calendar"** to proceed with the next step.



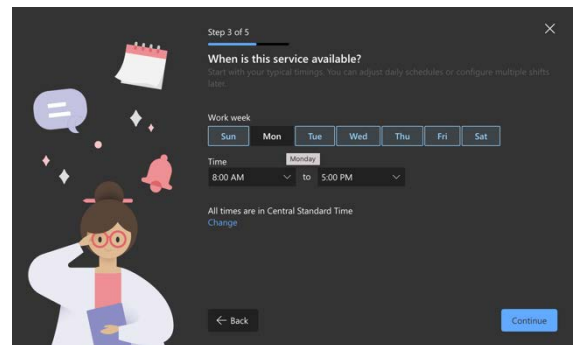
Step 2

5. Enter a **“Service Name”**
6. Select a **“Service duration”**
7. You may *enable* online meetings only if you and your students are using Teams
8. Click **“Continue”**



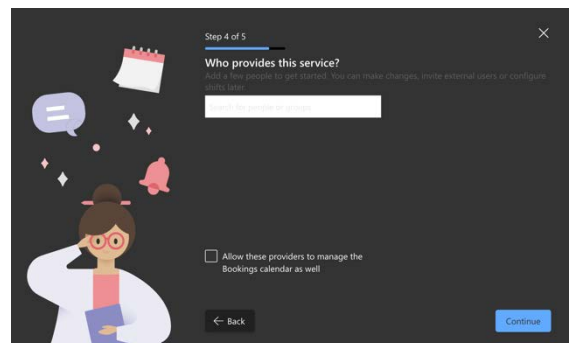
Step 3

9. On the next window, you will select your **“workweek availability”** (Note: you can always change your availability in the settings)
10. Enter your **“available time”**
11. Make sure you select the correct time zone
12. Click **“Continue”** to proceed with the next step.



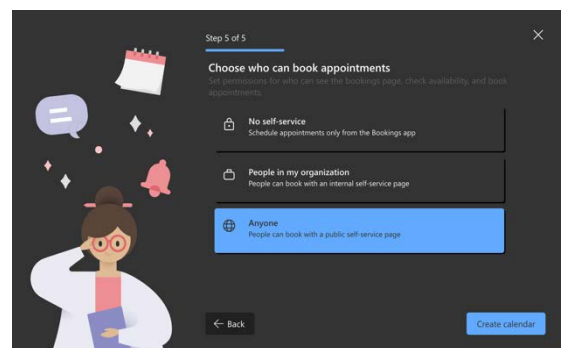
Step 4

13. Leave the field blank if you are the only one providing this service
14. Click **“Continue”**



Step 5

15. Choose who can book your appointments:
 - a. **No self-service:** Schedule appointments only from the Bookings app
 - b. **People in my organization:** People can book with an internal self-service page
 - c. **Anyone:** People can book with a public self-service page
 - d. Select **“Create calendar”**



16. You may copy the calendar URL, and
17. Select the Get Started button to manage your calendar settings.

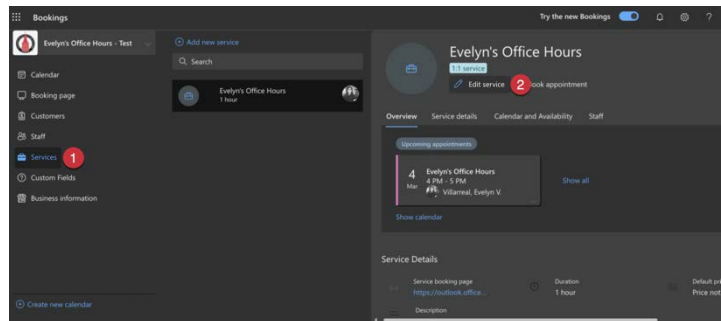


Customizing your Calendar Settings

Now that you've created your Bookings calendar, you can modify your settings by editing basic details, availability options, and custom fields.

Customizing Basic Details

1. On the Bookings homepage, go to Services
2. Click "Edit service"



The **Basic Details** option allows you to:

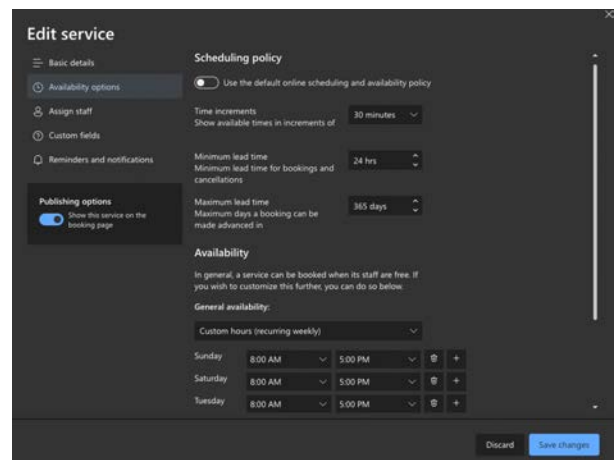
- a. Change the name of your calendar
- b. Add a Description
- c. Location
- d. Duration of the meeting
- e. Add notes that only you can see

Availability Options

These options let you modify the scheduling policies:

Scheduling policy

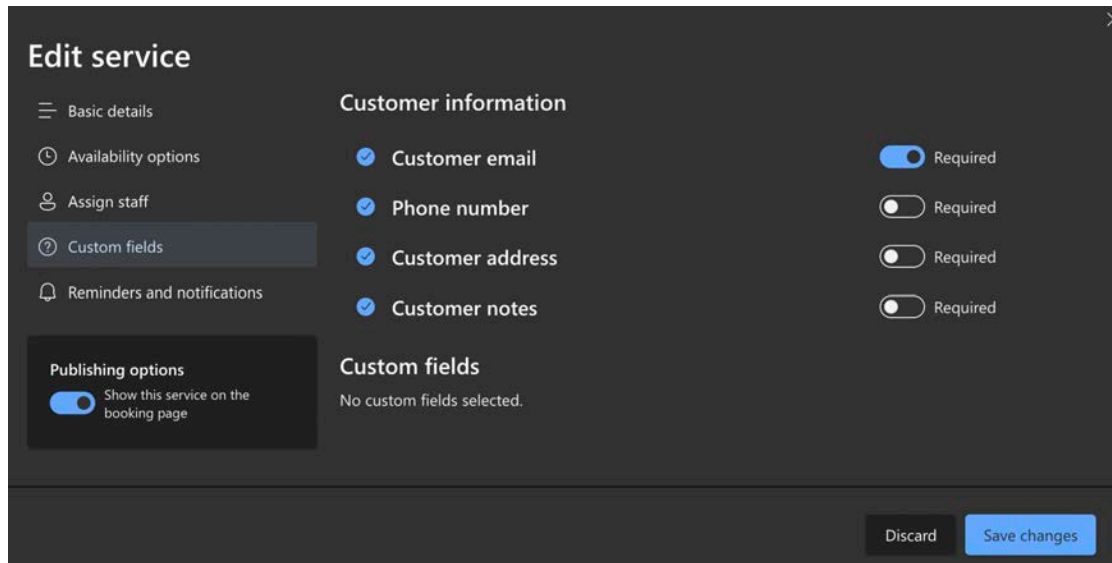
- **Time increments:** determines the time intervals between your appointments.
- **Minimum lead-time hours:** this allows you to specify the number of hours in advance that customers must book or cancel an appointment.
- **Maximum days in advance:** maximum days a booking can be made in advance



1. **Availability:** Bookings will default to regular business hours. You can use this option to change your regular office hours.

Customer Information Options

There are some basic customer information questions: Email, phone number, address, and notes. You can make any of the questions listed required by checking the field.



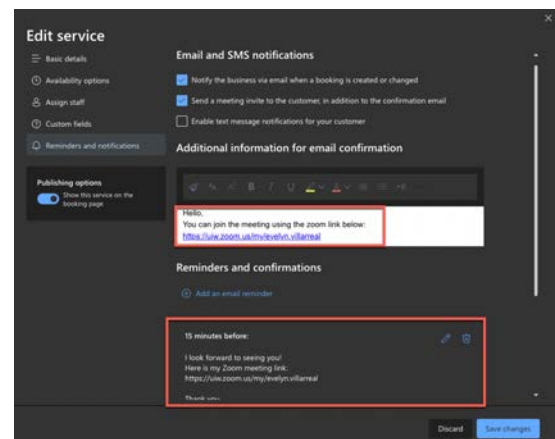
The screenshot shows the 'Edit service' interface with a sidebar on the left containing menu items: Basic details, Availability options, Assign staff, Custom fields (highlighted), Reminders and notifications, and Publishing options. The main area is titled 'Customer information' and contains four items, each with a checked checkbox and a toggle switch set to 'Required': Customer email, Phone number, Customer address, and Customer notes. Below this is a 'Custom fields' section with the text 'No custom fields selected.' At the bottom right, there are 'Discard' and 'Save changes' buttons.

Reminders and Notifications Options

You can set up notifications, additional information for email confirmation, and reminders to the person booking your appointment.

Email and SMS notifications

1. You may notify your business when a booking is created or changed
2. Send a meeting invite to the customer, in addition to the confirmation email
3. Enable and configure text message notifications; click the hyperlink for additional information: [Configure SMS notifications](#).

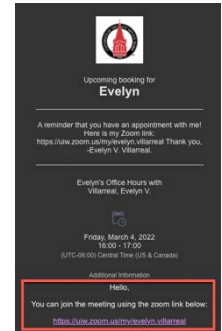


The screenshot shows the 'Edit service' interface with the 'Reminders and notifications' menu item selected in the sidebar. The main area is titled 'Email and SMS notifications' and contains three options, each with a checked checkbox: 'Notify the business via email when a booking is created or changed', 'Send a meeting invite to the customer, in addition to the confirmation email', and 'Enable text message notifications for your customer'. Below this is an 'Additional information for email confirmation' section with a text editor containing a message template. A red box highlights the text: 'Hello, You can join the meeting using the zoom link below: https://us.zoom.us/j/levelyn.vilarsal'. Below that is a 'Reminders and confirmations' section with an 'Add an email reminder' button and a preview of a reminder message. A red box highlights the preview text: '15 minutes before: I look forward to seeing you! Here is my Zoom meeting link: https://us.zoom.us/j/levelyn.vilarsal Thank you...'. At the bottom right, there are 'Discard' and 'Save changes' buttons.

Additional information for an email confirmation

1. You may provide additional information in the text field, and here is an excellent place to include your Zoom meeting URL.
2. Reminders and confirmations
3. This option allows you to send reminders to the customer; you may edit the email reminder and add the Zoom link here.
4. Be sure to **“Save Changes”**

Participants will receive an email notification with additional information.

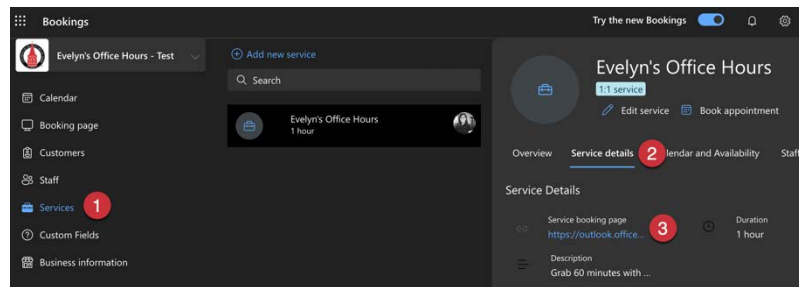


Sharing your Bookings Calendar

You can share the bookings calendar via email or add it to your email signature.

How do I get the Bookings link?

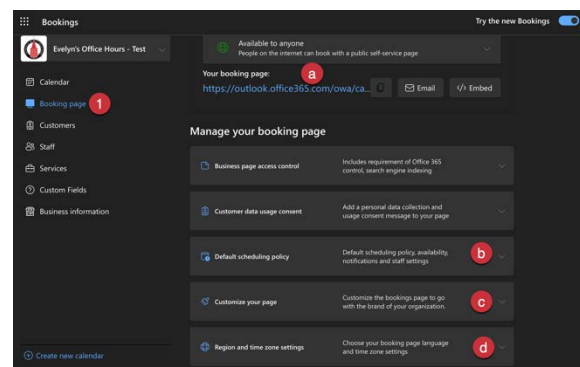
1. On the Bookings homepage, go to Services
2. Under the Services details tab, you will see the Service booking page
3. Hover over the Service booking page and click the copy icon



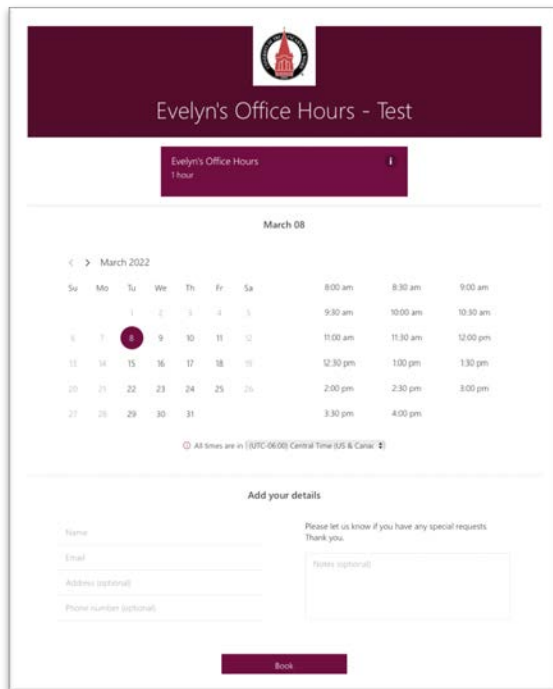
Modifying the Booking page

Allows you to view your calendar URL, customize your page, change your time zone settings. I will go over this are briefly.

1. On the Bookings homepage, go to the Booking page then you'll be able to view:
 - a. Your Booking page URL
 - b. Default scheduling policy
 - c. Customize your page
 - d. Region and time zone settings



Quick view of my Bookings calendar page:



Adding your Bookings calendar to your email signature in Office 365

1. On the Bookings homepage, go to **“Services”**
2. Under the Services details tab, you will see the Service booking page
3. Hover over the Service booking page and click the **“copy”** icon
4. Login to your email
5. Go to **“Settings”** and select **“View all Outlook Settings”**
6. Select Mail from the left menu, then **“Compose and reply”**
7. Highlight the text you would like to hyperlink and click the link button
8. Enter the URL into the Hyperlink window and click **“Save”**

