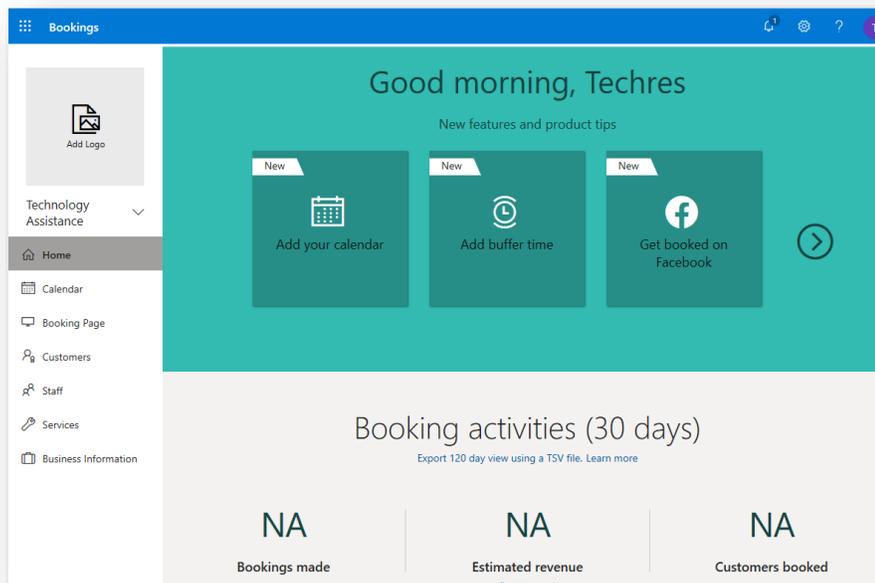


SCHEDULING ONLINE APPOINTMENTS WITH MICROSOFT BOOKINGS

Microsoft Bookings gives you a great alternative to time-consuming phone and email scheduling. Bookings provides an easy-to-set-up, customizable webpage that lets your students find available times and book virtual appointments. You can create a Bookings page for an entire department or just one course. Since Bookings is integrated with Microsoft Teams, your appointments can take place online through Teams meetings. A link to your services can be posted on a web page, in Canvas, or sent to students by email.

SETTING UP BOOKINGS

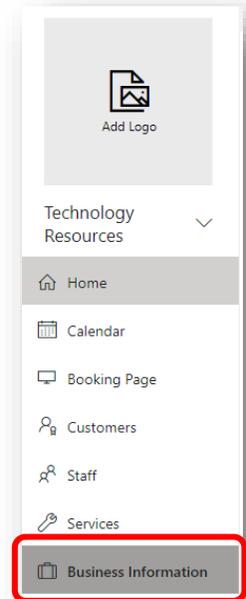
1. To access Bookings as the admin of a site, go to <https://outlook.office.com/bookings>.
2. When prompted, choose or enter the BJU account credentials you wish to use.
3. If you have never used Bookings before, click **“Get it now.”**
4. When prompted, click **“Add a booking calendar.”**
5. In the **“Business name”** field, enter the name you want to display; for example, your department or course name.
6. For **“Business type,”** something like Higher Education will do. After several seconds, you should be taken to your Bookings home page.



The home page presents an overview of activity as well as tiles with quick links to major actions. In this guide, we will follow the left-hand menu.

ADDING BUSINESS INFORMATION

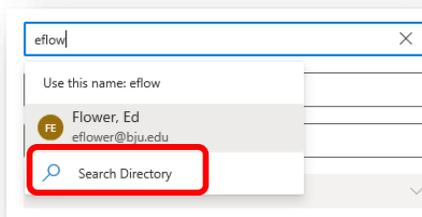
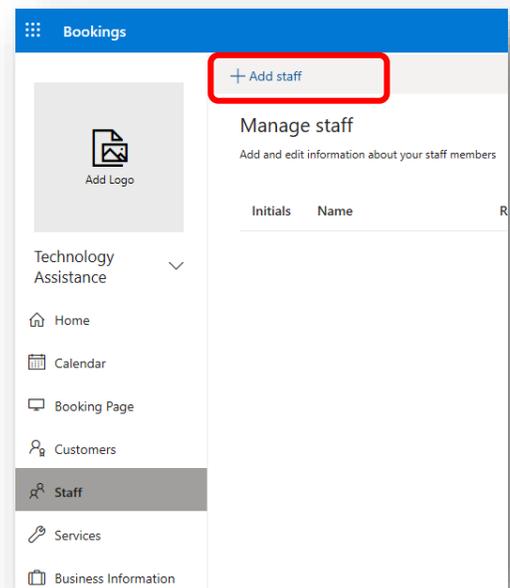
In the **Business Information** tab, specify details about your site. You can also add a logo to better identify your site, and you can set the specific hours within which appointments can be booked. If your staff/team members need more flexible hours, they can be set on an individual basis. **Save** any changes you wish to keep.



ADDING STAFF (MEMBERS)

You will need to add the team of people who will be using this Bookings page to assist students.

1. In the left-hand menu, click **Staff**.
2. At the top of the Staff page, click **Add Staff**.
3. In the Staff details page, start typing the username in the "Add People" field. You may need to click "Search Directory."



- When suggestions appear, choose the name of the person. You don't need to enter any additional information. The email address should be populated automatically. By default, new members are given the "Viewer" role. If you want the person to help manage the site, change their role to "Administrator."

A screenshot of a user profile form. At the top, there is a text input field containing 'Flower, Ed'. Below it is a greyed-out text input field containing 'eflower@bjui.edu'. Underneath is another text input field labeled 'Phone number'. Below that is a dropdown menu currently set to 'Viewer'. At the bottom, there is a small text box explaining the role: 'Viewers can see all the bookings on the calendar. They can't modify or delete them. They have read-only access to settings.'

- In the **Availability** column, select "Events on Office 365 affect availability."

You can also select "Use business hours" to force bookings into a schedule you set for the site in the Business Information tab. If the person needs more flexibility in hours of availability, deselect this setting and choose the appropriate schedule.

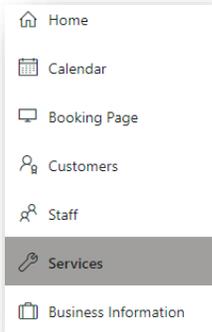
A screenshot of the 'Availability' settings panel. The title is 'Availability' with a subtitle 'Settings and working hours for the staff member [Learn more](#)'. There is a checked checkbox for 'Events on Office 365 calendar affect availability'. Below this is a greyed-out note: 'Please note, personal calendar availability will not be accounted for in multi-day services.' A red box highlights an unchecked checkbox for 'Use business hours'. Below this are fields for setting availability hours for each day of the week. Monday through Friday are set from 9:00 AM to 5:00 PM. Saturday and Sunday are set as 'Day off'.

- Save** your changes.

ADDING SERVICES

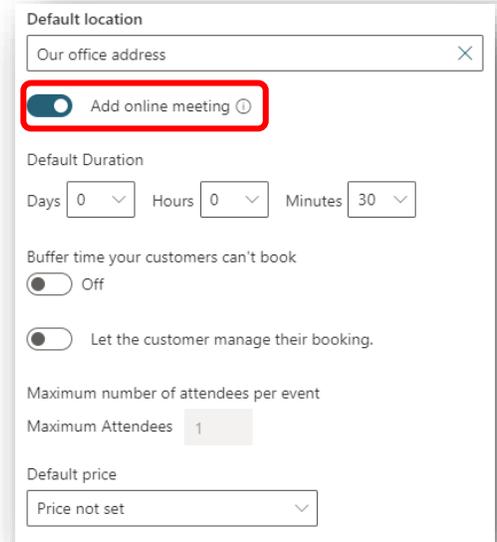
Services are what you are offering your students. For example, you may wish to create a service called "Virtual Advising Session." At this point, you may want to think about how you will offer your services. You can offer a single service such as "Virtual Advising Session" and let your students choose the person they want to interact with

from a list of staff members, or you can create a service for each staff member, such as “Virtual Office Visit with Dr. Brown,” and assign that service to that specific person.



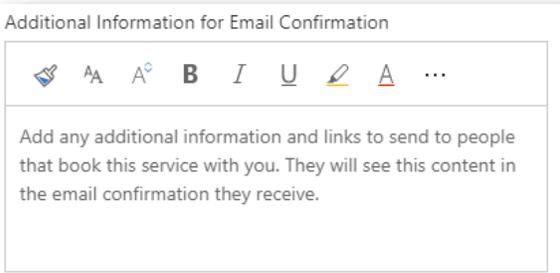
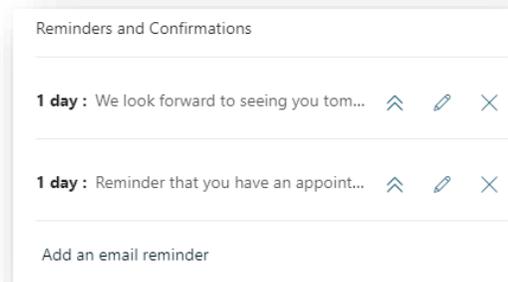
1. In the left-hand menu, click **Services**.
2. At the top of the page, click **Add a service**.
3. Enter the **Service name**, a brief **Description**, and **Default location** (such as “online”).
4. Toggle on **Add online meeting**.

This is an important step that turns on the integration with Microsoft Teams.



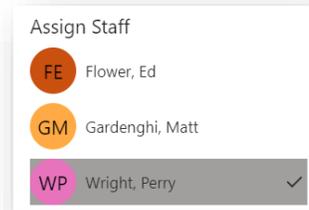
5. Set the **Default Duration** of the online meetings, such as 30 minutes.
6. If you want to set a buffer of time when students cannot book, toggle on “Buffer time your customers can’t book.” Buffering provides extra time between appointments to avoid back-to-back appointments. [Click here for more information on buffer times.](#)
7. Set the number of **Maximum Attendees**. (By default, it is set to 1.)
8. Change your **Default price** to “Free” or leave it as “Price not set.”

Under **Reminders and Confirmations**, two reminders are included by default, one to the student (customer) and one to the staff member. These are sent out one day before the appointment. You can edit those as necessary and add additional reminders.



Under **Additional Information for Email Confirmation**, you can add information to the confirmation email that goes out. For example, you could link to a page containing information you wish to discuss.

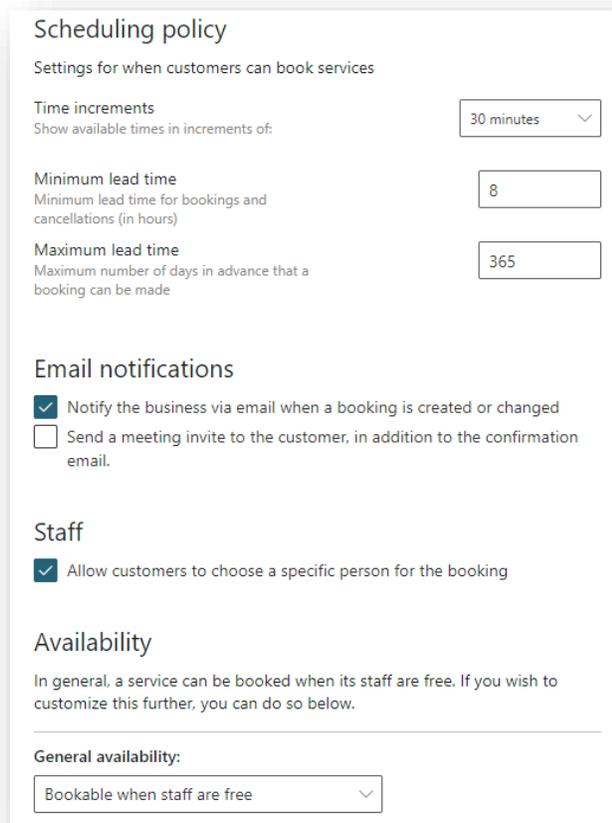
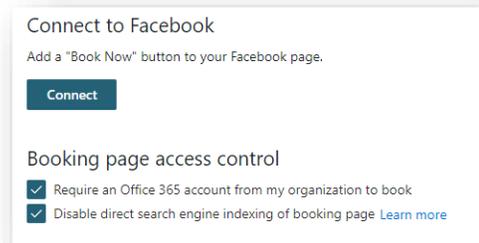
9. Your last step is to add the person or persons who will offer the “service.” Under **Assign Staff**, click the names that can be selected by the student when they book the appointment. **You must assign at least one person to a service.**
10. Click **Save** at the top of the page.



SETTING UP AND PUBLISHING YOUR BOOKING PAGE

In the left-hand menu, click the **Booking Page** tab to finish setting up the features of your site and to publish the booking page.

From this page, you can connect your page to Facebook, require users to have an Office 365 account, control general email notifications, and more. You can also customize your color theme.



Under **Scheduling policy**, set the time increments of your services/meetings. Also, specify any lead time required for booking appointments. For example, if you don’t want last minute bookings, you can specify a lead time of one hour or more.

Under **Email notifications**, be sure to select “Notify the business via email when a booking is created or changed” if the admins of the site want to be notified of activity.

Under **Staff**, you can decide whether students can choose who they schedule appointments with or whether the admins of the site do.

Under **Availability**, you probably want to just select **Bookable when staff are free** which will be subject to the business hours or specific hours you set for each service. But you can customize it further here.

By clicking the small blue link, “**Set different availability for a date range,**” you can close your booking for specific times of the year, like summer break.

Availability during these dates:

Start: 3/27/2020 End (inclusive): 4/3/2020

Bookable when staff are free

[+ Set different availability for a date range](#)

Save and publish Unpublish Embed

Booking page status: **Published** [Open published page](#)

Share your page

<https://outlook.office365.com/owa/calendar/BobJonesUniversity1@bj...>

[f](#) [t](#) [e](#) [Copy](#)

Once you finish with your settings, click the publish button to save and publish your booking page. Bookings will provide a link you can share to your site. The booking page displays all the services you have available. If you would rather share the services separately, you don’t need to share this link.

SHARING A LINK TO YOUR SERVICES

For students to sign up for your sessions, you need to make the link available to them. Once you set up and save a service do the following.

1. In the **Services** tab, click the service you want to share.

Manage services

Create and edit your bookable services

Service	Duration	Default price	Payment required	Assigned staff
Application Support	30 minutes	Free	None required	Wright, Perry
Virtual Office Visit	30 minutes	Price not set	None required	Wright, Perry
Academic Coaching Session	25 minutes	Price not set	None required	Wright, Perry

2. At the top of the page under “Share your page for this service,” Either **Share via Email** or **Copy** the link. The link can be posted in Canvas, websites, etc.

Service details

Share your page for this service

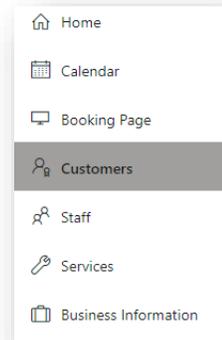
Share a booking page URL specifically for this service

<https://outlook.office365.com/owa/calendar/BobJonesU...>

[Share via Email](#) [Copy](#)

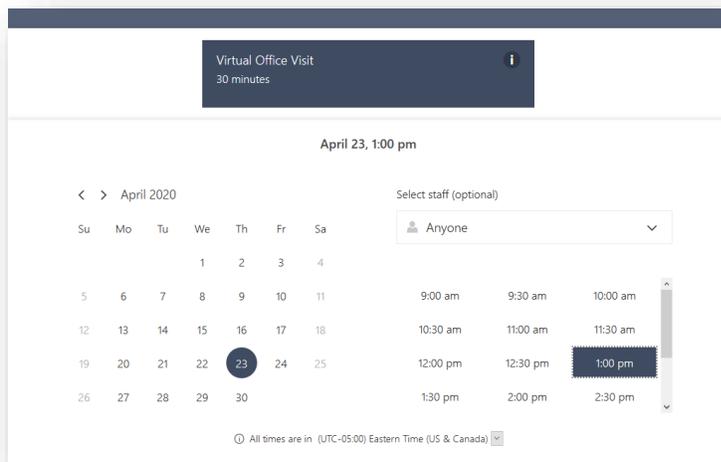
ADDING CUSTOMERS (STUDENTS)

You do not have to add your students to Bookings. As students book appointments through the links you provide, they will appear in the **Customers** area of your site. You can manage them from there and edit their accounts to add additional information.



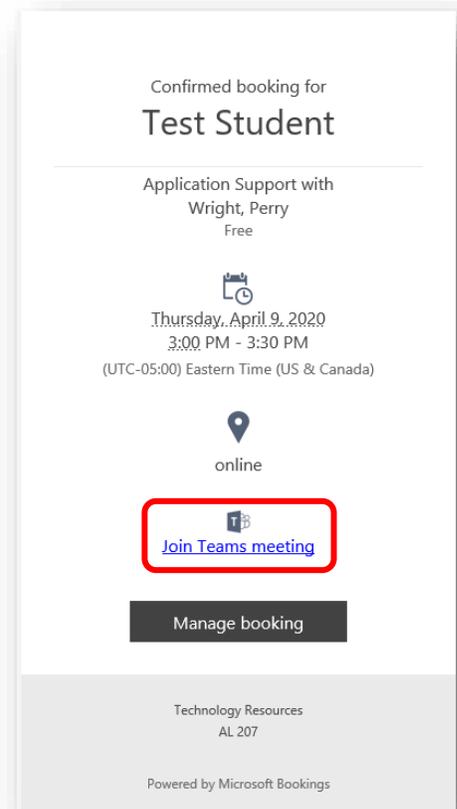
BOOKING APPOINTMENTS OR SERVICES

Students who receive a link to a service can go to a specific page for that service to book a time and choose a staff member (if permitted).



Once they submit the booking, they will receive a confirmation, and the assigned staff member will be notified. Admins will also be notified if you selected that option in the Booking Page tab.

The student confirmation email typically looks like the image to the right. Since "Add online meeting" was toggled on when the service was set up, the "Join Teams meeting" is included for the student. (Assigned staff members receive a similar email confirmation.)



The meeting automatically populates to both Teams and Outlook Calendars for staff. Students can use the “booking.ics” file attached to their confirmation email to place the appointment on their calendars.

Staff can click the link in their confirmation email or on their calendars to open Teams and start the meeting. Students will join from the link they received.

VIEWING THE CALENDAR

Click the **Calendar** tab to view and print all your bookings. You can also schedule time off for certain staff members when necessary. Click any calendar items to get details about the event and to edit it.

