Microsoft Bookings

Bookings is a great program to use to allow people to sign up for meetings with you. These instructions will walk you through how to set up bookings for yourself for events like parent teacher interviews.

STEPS

 Go to Office 365 online: Go to comoxvalleyschools.ca Click on Office 365 If you are at home, log in with your work email a 	ddress and regular computer password
Click on the "Apps icon" to view all of the apps. Click on the Bookings icon. If you do not have it yet, click on "All apps ->" on the right and locate it in the Office 365 apps list. Click on it to open it.	Bookings
If this is your first time you will have to click on "Get it Now". Type in your name and make sure that it connects with your office 365 account – you will know if it finds your name. (If this is your first time accessing Bookings, follow the prompts to create your own personal bookings page.)	Microsoft Bookings Online scheduling your customers will love Get it now
Click "Create booking page"	+ Create booking page
If a booking page was created last year, you can clone it from existing . (Follow the prompts until it is created and continue on with step #11.) If not, " Create from scratch ".	Create a shared booking page Choose how you want to get started + Create from scratch Or clone from an existing booking page P Parent Teacher Interview - Fall
Insert name of Booking Page. Add a logo if you wish. Do not set the times here. Under Business Type choose Education. Click Save at the top.	Step 1 of 4 Create a new shared booking page The business name you enter here will be used to create the email address for sending booking invites (e.g. businessname@domain.com) and the booking page link (e.g. https://book.mt/br/businessname@domain.com). Name* Give your booking page a name Image: Ord d logo Business type V Business hours Mon-Fr. 900 AM - 500 PM. Change V
	 Go to comoxvalleyschools.ca Click on Office 365 If you are at home, log in with your work email a Click on the "Apps icon" to view all of the apps. Click on the Bookings icon. If you do not have it yet, click on "All apps ->" on the right and locate it in the Office 365 apps list. Click on it to open it. If this is your first time you will have to click on "Get it Now". Type in your name and make sure that it connects with your office 365 account – you will know if it finds your name. (If this is your first time accessing Bookings, follow the prompts to create your own personal bookings page.) Click "Create booking page" If a booking page was created last year, you can clone it from existing. (Follow the prompts until it is created and continue on with step #11.) If not, "Create from scratch". Insert name of Booking Page. Add a logo if you wish. Do not set the times here. Under Business Type choose Education.

7	Invite any staff you may to your bookings page. administrative assistan	(Team teachers,		Step 2 of 4 Invite staff Invite stew people to get started. You can always make changes, invite external users or configure their availability later. Image: Invited staff will be assigned the Team member role by default. You can assign different roles to rewrite they have adequate access. Learn more aboot roles Starch or add a resource Image: Shannon-Hagen@ist7t.bcca	×					
8	Do not set up service h on.	ere. You will do it later		Step 3 of 4 Set up a service A service is an appointment type. We've created an initial appointment type below that you can customize as you see fit. Image: The state of t						
9	Choose " Anyone " for appointments. Click " Create ".	who can book		Step 4 of 4 Choose who can book appointments Set permissions for who can see the bookings page, check availability, and book appointments. Image: Schedule appointments only from the Bookings app Image: Schedule appointments only from the Bookings app Image: People in my organization People can book with an internal self-service page Image: People can book with a public self-service page						
10		People can book appointments at: https://outlook.office365.com/owa/calendar/test6@learn71.onmicrosoft.com/booking s/ E Share There's a lot more that you can do to customize your scheduling experience. We will help you discover these as you continue using Bookings. V Get started Click on "Get Started" to configure your bookings calendar.								

11	Select " Bookings page" from the list.		 ← Back to all be P Parent Calendar Customers Staff Services Business int CALENDAR FIL Services Staff Services 	Teacher Interview v Ige formation s TERS Q Q		
12	Be sure "Available to anyone" is selected. Scroll down to "Customize your page". Skip all the rest. Check to make sure time zone settings are correct.	Vou htt Mana © 1 © 1 ©	Infigure booking page		nbed × ×	
13	Customize your page. Select your colour theme, page template and logo. When finished, scroll up and click " Save ".		Customize your page Page template Classic Color theme Set custom color for your book Logo Display business logo on your		^	
14	Skip Customers and click on Staff from the left	sidebar.				
15	You will see your name as an administrator. Hover the mouse over the name on the right and click on pencil icon to edit your details. Give yourself a colour for your bookings calendar.		t Teacher t.teacher@sd71.bc.	ca	[0

	If "Events on Office calendar affect availablity" be sure your Outlook calendar is up to date.										
	Leave Use Business Hours as default. Click Save on bottom right.										
16 17	Click on "Services" on the left side bar. Use th Basic details Fill in the necessary details. Name of Service Description of Service Location of Service. Turn off "Add online meeting" if in person. Determine length of parent visit for Duration. Use the scroll bar on the right to access all of the fields. Set price to "Free" Under Publishing options -> make sure the "Show service on the bookings page" is	Edit service Edit service Basc details Auslability options Auslability options Auslability options Default scheduling p Custom fields Default scheduling p Custom fields Default scheduling p Publishing options Cont his sample	s solicy O fractors and	Pare Book Cocal C	ent Teachd some time i tion Add online end an anon on \$ days Buffer time	er Interv with your to meeting C 0 0 0 h to n h to n add n	iew - Fall eacher 0 15 $\hat{\}$ min ve about this serv		you and y	our staff see.	×
	toggled on.					ners manage ur staff on tř	e their appointmen neir behalf.	t when it was	booked t	9y	
	Availability options Time Increments: The increments indicated here should reflect the length of "Duration" noted above for parent visit. Under General Availability choose Not Bookable. Click on + Set different availability for a date range Set the date range to the dates for your parent		Not bo Availabi Start 11/18/	ility duri	ng the:	End (i 11/1 ng wee Not bo	nclusive) 9/2020		+ +	(III)	
10	teacher conferences.		Wednesd	ay 3:0	00 PM	~	5:00 PM	~	×	+	
18	Click on		Thursday	8:3	30 AM	~	5:00 PM	~	×	+	
	Bookable when staff are free \checkmark		Friday				okable		+		
	And change it to Custom Hours (recurring weekly)		Sunday Not bookable +				+				
	Now set the times to the times that you are available for Parent Teacher Interviews.	+ Set different availability for a date range									

 <u>Assign Staff</u> Under "Select Staff", check the or your name to assign to this "serve will then appear on "Assigned stand If you have more than one person bookable time, "Allow custome choose" otherwise, turn this off 	rice" to you. It aff". In for this I rs to	 Assign any of your selected staff for an a Assign all of your selected staff for an ap Allow customers to choose a particul Select Staff Q: Search for a staff member Shannon Hagen 	ipointment. ①
20 Custom Fields Under Custom Fields if you cho custom field", it will allow you to information from the parents. You can also indicate whether you information to be included as a result.	ask more ou'd like parent	 Customer email Phone number Customer address Customer notes Custom fields No custom fields selected. Add a custom field 	Required Required Required Required
 Notifications If you are having virtual meeting Bookings create the Teams links Send meeting invite to custom a Teams link automatically sent and you. Bookings will send an email con the parents. Any additional you provide to the parent can be add provide to the parent can be add on "Add an email reminder". Y the message that the parents wi box below. Click "Save changes" to save information included in the "E tab. 	s, click on her to have to the parents firmation to d like to led here. email the day like by clicking You can Type Il get in the the	Email confirmation A confirmation email is sent to your custom appointment is scheduled, updated or cance Settings outfy the business via email when a bo end a meeting invite to the customer. Add additional information Add additional information and links that y confirmation Email reminders Send reminder emails to your customers and appointment. O Add an email reminder Send reminder emails to the person booking to O Add an used reminder Send reminder emails to the person booking to O Add an used reminder Message K B I U C A C Message Vour parent teacher email is coming up tem	elled. boking is created or changed in addition to the confirmation email b cal b ca
 From the Service side tab, screw "Services Details", copy the line parents for them to sign up for the teacher interviews with you. You will get an email when each and it will show up in the booking and in your outlook calendar. 	k to send to ne parent one signs up		ffice3 15 minutes