Microsoft Bookings Training

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- What is Bookings?
    - Helps book appointments.
    - It is integrated with Microsoft calendar.
    - Avoids double bookings.
    - Meetings are virtual through Teams and a link is automatically generated and send to your customers (parents).
- Go to the waffle, click Bookings. If you don't see it, click "All Apps". Type a business name (ex: Mrs. Lagnese Grade 5)
- Microsoft Bookings: This is what you will see on the left side. Tabs: Home, Calendar, Booking Page, Customers, Staff, Services, Business Information. You can edit your picture if you wish.

Hempstead Schools ⌄

⌂ **Home**
▦ Calendar
▭ Booking Page
⧑ Customers
⧒ Staff
⚲ Services
▢ Business Information
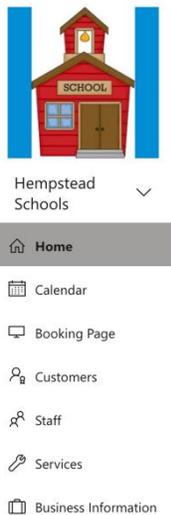
- <u>Work Backwards to enter information:</u>
    - **Business Information:**
        - Enter business information: Name, address, phone number, email.
        - Enter business logo (or any picture you choose)
        - Enter business hours
    - **Services**:

- + Add a Service

- Service name-Parent Teacher Conferences

- Description-20-minute conference regarding student progress.

- Default location-Toggle Add online meeting (Via Teams)

- Duration-20 minutes

- Attendees: 1

- Price (N/A)

- Custom Fields-Modify (customer email, phone number, address, customer notes). At the top you can ask a text question or a dropdown question (What is your child's name)

- Reminders and Confirmation (1 day). Can add email reminder and any additional information for email confirmation. Can also enable text message notification (they have to input their cell number for this)

- Publishing options (check)

- Online scheduling options (uncheck)

- Scheduling policy: Time increments (20min), Minimum lead time in hours, Max lead time in days.

- Staff: Allow customers to choose staff

- Email notifications: Both checked if wish.

- Availability: General (not bookable), Availability during these dates: 11/23-11/23, Hours: custom hours 1-4, 4-6, not bookable on other days.

- Assign staff: Teacher(s)
  CLICK SAVE

o **Staff**: Add co-teacher if needed.

o **Customers**: They will appear once you have customers.

o **Booking Page**:

- Publish to receive the link.

- Booking page access control: Check "Disable direct search engine indexing of booking page". This way no one can search it on Google or Bing or any other search engine.
- Scheduling Policy: Time increments, minimum lead time, maximum lead time.
- Email notifications (check both boxes if you wish)
- Staff
- Availability: Bookable when staff are free
- Customize your page: You can customize the theme and show the logo.
- Save and publish
- **Calendar**: Can view your calendar, make a new booking, etc. The calendar automatically syncs to your Microsoft calendar. You will automatically have a Teams link for your conference.
- **Home**