

Microsoft Bookings

User Guide



Table of Contents

Overview	3
Accessing Microsoft Bookings	3
Configuration	1
Home Screen	4
Calendar	1
Booking Page	5
Customers	Э
Staff	Э
Services	C
Business Information14	1
Deactivating the Booking Site	5
Booking Page	5
Appendix A – Document History	C
Major Revisions	C



Overview

Accessing Microsoft Bookings

To access Microsoft Bookings, login to the Niagara College portal (<u>https://portalnc.niagaracollege.ca/</u>) and click on **More Applications**



Expand the Microsoft O365 heading

Microsoft 0365								
the second se	SSI Notebook Ms Delve	슈 MS Excel	F S A	G MS Gartner	MS Newsfeed	MS OneDrive	MS OneNote	MS PowerPoint
AS Stream	AS Sway	다 V 원 MS Video	MS Word	Y≎ ☆ MS Yammer				

Click on **MS Bookings** icon to open the application. If this is your first-time opening MS Bookings, a prompt will appear to search for or add a new business. Create your business with a meaningful name, choose the type **Colleges and Universities** and click **Continue**.

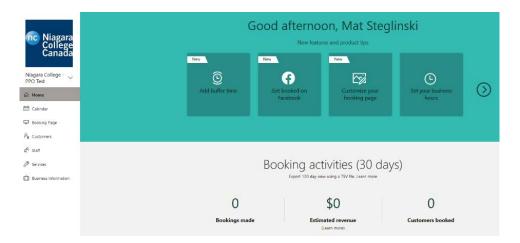
Welcome to Bookings	
Tell us about your bu	isiness
Business name	
Colleges & Universities	
No thanks	Continue

Note: The name you enter for the business should be unique and have a clear purpose that staff and students will understand (Example: User Services – Support Appointments)



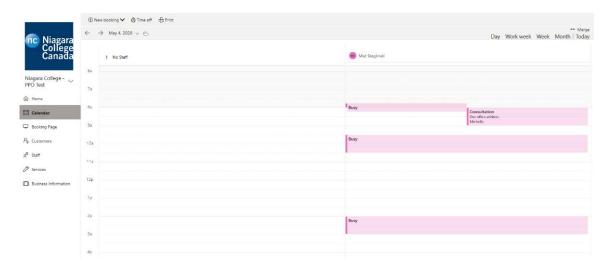
Configuration

Home Screen



The **Home** screen displays a summary of recent bookings as well as quick links to update your bookings site.

Calendar



The calendar view shows you your staff calendars by day, week or month and the appointments that have been scheduled for them. From this screen you are also able to create appointments through the backend using the **New Booking** option.

NIAGARA COLLEGE CANADA



🗟 Save 🗻 Discard

Customer name

Customer email Phone number

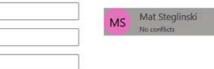
Customer address Customer notes

Customer information

Enter customer and service information

Staff

Choose one or more staff for the service



Edit customer details and notes

 Don't send customer an email confirmation.
 Enable customers to manage their appointment when it was booked by you or your staff on their behalf.
 Send a meeting invite to the customer, in addition to the confirmation email.

Service details

Start	
5/4/2020	11:00 AM 🗸
End	
5/4/2020	11:30 AM 🗸
All day event	n't book
Off Off	
Our office address	×
Price not set Are you a staff member or a stude Staff	ent?
Department:	
This is where you can add notes your staff see.	about this service that only you and

Add an email reminder



Booking Page

		Cur	stomize your	nage
Booking page status		Chor	stomize your ose your color them	
Published 🛇	Open published p	age Previ		ie.
Share your page		Previ	ew	
https://outlook.office365.com/owa/calendar/f	NiagaraCollegeTest@n	est		
f 💟 🔤	C	py		
Connected Freehealt			C	
Connect to Facebook Add a "Book Now" button to your Facebook pag	1 0 .			
Connect		Colo	r theme	
Booking page access control				
Require a Microsoft 365 or Office 365 accou	int from my organizat	tion to		
Disable direct search engine indexing of boo	king page Learn mor	•		
			Set custom color so Highlight color	heme for your booking pay Header color
Customer data usage consent		· · · ·	#007DC3	#003a6c
Show a personal data collection and usage on my booking page	consent toggle along	with a Looo	57 51	
Enter your personal data collection and usa	ige terms here.			go on your booking page
		Reg	gion and time	e zone settings
			ige language and ti	
Scheduling policy Settings for when customers can book services				me zone settings dots in business time zone
Settings for when customers can book services Settings for when customers can book services				
Settings for when customers can book services	30 minutes			
Settings for when customers can book services Settings for when customers can book services Time increments	30 minutes	~		
Settings for when customers can book services Settings for when customers can book services Time increments Brow available times in increments of Minimum lead time for bookings and	[10.00000000	~		
Settings for when customers can book services Settings for when customers can book services Time increments Brow available time in increments di Minimum lead time Minimum lead time Manimum and time of about a discount that a	12	~		
Settings for when customers can book services Settings for when customers can book services Time increments Boox available times in increments of: Minimum lead time Minimum lead time Maximum lead t	12 30	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments Dow evaluate times in increments of: Minimum lead time Minimum lead time Maximum lead time Maximum earther of days in advance that a booking can be made	12 30	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments Dow available times in increments of: Minimum lead time Maximum lead time Maximum earther of days in advance that a booking can be made Parall notifications Coded a meeting invite to the customer, in add Coded available Coded av	12 30	> 8		
Settings for when customers can book services Settings for when customers can book services markets Settings for when customers can book services The accentering the inne innement of the customers Setting Carlot for the business via email when a booking Carlot for the business via email wh	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments Dow available times in increments of: Minimum lead time Maximum lead time Maximum earther of days in advance that a booking can be made Parall notifications Coded a meeting invite to the customer, in add Coded available Coded av	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments The increments The increments The increments of: The increment of the increments of: The increment of the increment the	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services minorements The incorements T	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments The available limes in increment of Minimum lead time Minimum lead	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments Dece invalidate times in increments of: Minimum lead time for the book of the	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments Them environment Them increments Them environment difference Minimum head time Minimum number of algoin advance that a booking one week Maximum lead time Minimum number of algoin advance that a booking one week Email notifications Constitution Automation Define a meeting invite to the customer, in add email. Staff Minimum for the previous be booked when its staff a customider the further, you can be booked when its staff a customider the further, you can be booked when its staff a customic the further, you can be booked when its staff a customic the further, you can be booked when its staff a customic the further, you can be booked when its staff a	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments Book available lines in increment et Minimum lead time Minimum lead time Minimum lead time of the book services Maximum lead time Minimum lead time of the book services Email notifications Send a meeting invite to the customer, in add email Staff Saff Move customers to choose a specific person for Availability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Availability Move customers to choose a specific person for Costability Move customers to choose a specific person for Availability Move customers to choose a specific person for Availability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers to choose a specific person for Costability Move customers Costability	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services Time increments The increments The increments The increments of: Maximum number of algo in advance that a booking care is made Maximum number of algo in advance that a booking care is made Email notifications Constitution Setting The increments to choose a specific person of Availability There, you can be booked when its staff a customize this further, you can do so below. Email availability: Bookabile when staff are free Availability during these dates:	12 30 is created or changed tion to the confirmatio	> 8		
Settings for when customers can book services Settings for when customers can book services Time incorements Decemposite times in incorements of: Minimum lead time for bookings and concellations (in book) Maximum lead time Maximum author of days in advance that a booking can be made Email notifications Modify the business via email when a booking Setaff Auximum lead receiption in the customer. In add email Staff Maximum lead receiption in the customer. In add email Compared a service can be booked when its staff a customize this further, you can do so below. Email availability: Bookable when staff are free Valiability during these dates: Start End (industive)	12 30 is created or changed tion to the confirmatio	> 8		

On the **Booking Page**, you can define the appearance and rules for your business landing page as well as publish your appointment booking page to the web. Under **Booking Page Status**, you can **Save and**



Publish the site, copy the URL to share it and **Open the Published** Page to preview how it looks and functions.

Tip: To publish the a the link posted and	appointment booking link in Blackboard , navigate to the area where you want with Edit Mode on
Edit Mode is: ON	
Click on Build Conte	ent and then Web Link
Build Content 🗸	
Create	
ltem	
File	
Audio	
Image	
Video	
Web Link	
URL from MS Bookin	pops up, give the link a name (Example: "Book an Appointment") and paste the ngs as the link.
* Name	Book an Appointment
* URL	
A ONE	CollegeTest@ncstudents.niagaracollege.ca/bookings/ For example, http://www.myschool.edu/
	This link is to a Tool Provider. What's a Tool Provider?
Click Submit to save	e and publish the link.
Appointments	
Book an Ap	<u>apointment</u>



Other options on the **Booking** Page include:

Color Scheme

Tip: Header color should be set #FFFFFF (White) and the highlight color can be one of:

#0077BE (NC Blue) #003A6C (Dark Blue) #262626 (Dark Grey) #DADADA (Light Grey)

• Requiring users to have an Office 365 account to book an appointment

Tip: Recommended to select this option if you only want Niagara College staff and students to be able to book appointments

- Time increments
- Email notifications
 - Sending a meeting invite to the customer
 - o Emailing business when appointment created or changed
- Staff
 - o Allowing customers to pick which staff member they want to meet with
- Availability
 - o Set the availability for your services
 - o Options include:
 - Bookable when staff are free
 - Not bookable
 - Custom availability (Set specific hours when the appointments can be booked)



Customers

nc Niagara College Canada	+ New ⊘ Edit	Michelle
Canada	M Michelle	Contacts Notes
Niagara College - 🗸 PPO Test		Email Email : <u>michellemax@cogeco.ca</u>
☆ Home		
📶 Calendar		
🖵 Booking Page		
$P_{\rm g}$ Customers		
g ^R Staff		
Services		
Business Information		

On this page you can view, create, edit and import (via CSV) customers. You are also able to add notes to a customer record for other internal staff to see.

Staff

nc Niagara College Canada	Manage Add and edit	e staff information about your staff	members			
Canada	Initials	Name	Role	Bookable	Email	Phone
Niagara College - 🗸 PPO Test	MS	Mat Steglinski	Administrator	Yes	msteglinski@niagaracollege.ca	No phone
d Home						
Calendar						
Booking Page						
g Customers						
² Staff						
Services						
Business Information						

The **Staff** screen lets you manage the staff who will be bookable for the services you offer. Staff can have three different levels of access:

• Administrator

• Can edit all settings, add, or remove staff members and create, edit and delete bookings

• Viewer

NIAGARA COLLEGE CANADA



- Microsoft Bookings User Guide
- o Can see all the bookings on the calendar but cannot edit or delete
- Guest
 - Can be assigned to bookings but cannot view the bookings mailbox

Staff details	Availabil	lity						
nter information about your staff member	Settings and m	neeting hours	for the	staff member	Learn	more		
Membership information Status: New Staff members will be notified via email about their membership for this booking calender.	Events on Office calendar affect availability Please note, personal calendar availability will not be account in multi-day services. We business hours							
B	Monday	8:00 AM		3:00 PM	~	×	+	
	Tuesday Wednesday	BOD AM	~	5:00 PM	v v	×	4	
Tracy Booth X	Thursday	8:00 AM		5:00 PM		×	4	
tbooth@niageracollege.ca	Friday	8:00 AM	v	5:00 PM	4	×	4	
Phone number	Saturday		G	ised		+		
Guest 🗸	Sunday		G	used		+		

Services

Notify the staff via email when a booking assigned to them is created or changed

	+ Add a service				
nc Niagara College Canada	Manage services Create and edit your bookable ser	vices			
Canada	Service	Duration	Default price	Payment required	Assigned staff
Niagara College - 🗸	Consultation	1 hour	Price not set	None required	Mat Steglinski
PPO Test	Project Request	1 hour	Price not set	None required	Mat Steglinski
Home					
Calendar					
Booking Page					
g Customers					
R Staff					
³ Services					
Business Information					

The Services page lets you add, edit, or delete the services offered by your area.





Service name Project Request Description Schedule a meeting to discuss a new project for your department Potent focation Teams Meeting Potent focation Potent focation Potent		
Share your page for this service Share your page for this service The your page for this service The your page for this service Share your page for this your page for the your page for the your page for the your page for		
But a a used integrage URL specifically for this service Introduced infrest 55.com/www.claendar/klagara Colleu. Star word finall Cop Provide a started information about your service Service a name Project Request Provide information about your service for your Cop Cop <	Service details	Assign Staff
Iteracional configuration and unified as selected. You can modify	Share your page for this service	MS Mat Steglinski 🗸
Share via Email Cory Extrem information about your service Service name Project Request Description Schedule a meeting to discuss a new project for your department Schedule a meeting to discuss a new project for your department Tams Meeting C Add online meeting © Default Duration Days Dys O Hours Image customers can't book Image customers to manage their appointment when it was to subtranse your customers can't book Image customers to manage their appointment when it was to subtranse your customers to manage their appointment when it was booked by your or your stiff on their behalf. Madimum number of attendees per event Madimum Attendees S Default price Price not set Vetes (internal only) Custom Fields Index: Image: La quick reminder that your ser Image: Maditional Information and links to send to people that book this service with you. They was the this content in	Share a booking page URL specifically for this service	
Enter information about your service Service nam Project Request Description Solution Solution Teams Meeting Teams	https://outlook.office365.com/owa/calendar/NiagaraColle	
Service name Pripace Request Description Scheduke a meeting to discuss a new project for your department Default Location Teams Meeting Teams Meeting Of do unine meeting © Default Duration Dargo O Hours I Muntes O C Default Duration Dargo O Hours I Muntes O C Default Duration Dargo O Hours I Muntes O C Default Duration Dargo O Hours I Muntes O C Default Price Price not set O regulated and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom fields selected. You can modify the selected field and 1 optional custom field selected field the selected field and the selected field the selected field and the selected field	Share via Email Copy	
Project Request Description Schedule a meeting to discuss a new project for your department. Default location Teams Meeting Teams Meeting <td>Enter information about your service</td> <td></td>	Enter information about your service	
Derivition Schedule a meeting to discuss a new project for your department: Default focation Teams Meeting Teams Meeting Of add online meeting O Default Duration Days O Hours T Days O Hours T Montes O off Set for intervent with the intervent was booked by you or your staff on their behalt. Watimum number of attendees per event Maintum Attendees Sole Default price Price not set Your Custom Fields Default price Price not set Your Sole Or gruined and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations It day: Just a quick reminder that your ser Ref R I I I I I I I I I I I I I I I I I I	Service name	
Schedule a meeting to discuss a new project for your department: Teams Meeting Teams Meeting Add online meeting () Default Duration Days Orf Teamble customers can't book off Teamble customers to manage their appointment when it was booked by you or your staff on their behalf. Maximum number of attendees per event Maximum Attendees S Default price Price not set Custom FieldS Drequired and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations It day : Just a quick reminder that your ser R Add an email reminder Maditional Information for Email Confirmation Add any additional Information and links to send to people that book this service with you. They will see this content in	Project Request	
department Default location Teams Meeting Default Duration Default Duration Default customers can't book Default prover Default prove Custom Fields Or guide and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations It day: Lust a quick reminder that your ser A A B I I I A A A A I I I A A A IIIIIIII	Description	
Teams Meeting Add online meeting () Default Duration Days Days Image: The point of the po		
Add online meeting ○ Default Duration Days ○ → Hours 1 → Minutes ○ → Buffer time, your customers can't book Image:	Default location	
Default Duration Days Days Days Image: Days Ima	Teams Meeting X	
Days Hours Minutes Buffer time your customers can't book Image their appointment when it is booked by you or your staff on their behalf. Maximum number of attendees per event <	Add online meeting ①	
Buffer time your customers can't book Image: Control of the second of		
 Of Enable customers to manage their appointment when it was booked by you or your staff on their behalf. Waximum number of attendees per event. Maximum Attendees S S Default price Price not set Notes (internal only) Custom Fields Dequired and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations I day: Just a quick reminder that your ser Add an email reminder Additional Information for Email Confirmation Add any additional information and links to send to people that book this service with you. They will see this content in	Winutes U	
was booked by you or your staff on their behalf. Maximum number of attendees per event Maximum Attendees 5 Price not set Notes (internal only) Custom Fields Drequired and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations 1 day: Just a quick reminder that your ser Add an email reminder Add any additional information and links to send to people that book this service with you. They will see this content in	Buffer time your customers can't book Off 	
was booked by you or your staff on their behalf. Maximum number of attendees per event Maximum Attendees 5 Price not set Notes (internal only) Custom Fields Drequired and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations 1 day: Just a quick reminder that your ser Add an email reminder Add any additional information and links to send to people that book this service with you. They will see this content in		
Price not set Notes (internal only) Custom Fields D required and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations 1 day: Just a quick reminder that your ser $\land \checkmark \checkmark \checkmark$ Add an email reminder Additional Information for Email Confirmation Image: A A ^o B I U A M M Add any additional information and links to send to people that book this service with you. They will see this content in	Maximum number of attendees per event Maximum Attendees 5	
Notes (internal only) Custom Fields D required and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations 1 day : Just a quick reminder that your ser $\land \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ $	Default price	
Custom Fields D required and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations I day: Just a quick reminder that your ser \land \checkmark \checkmark Add an email reminder Additional Information for Email Confirmation \checkmark \land \land \land B I \sqcup \checkmark \land Add any additional information and links to send to people that book this service with you. They will see this content in	Price not set	
D required and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations 1 day : Just a quick reminder that your ser	Notes (internal only)	_
D required and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations 1 day : Just a quick reminder that your ser		
D required and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations 1 day : Just a quick reminder that your ser		
D required and 1 optional custom fields selected. You can modify the selected fields below. Modify Reminders and Confirmations 1 day : Just a quick reminder that your ser		
Modify Reminders and Confirmations 1 day: Just a quick reminder that your ser Add an email reminder Additional Information for Email Confirmation ✓ A A° B I U A … Add any additional information and links to send to people that book this service with you. They will see this content in	Custom Fields	
Reminders and Confirmations 1 day : Just a quick reminder that your ser $\land \ \mathscr{O} \times$ Add an email reminder Additional Information for Email Confirmation $\checkmark \ A_A \ A^\circ \ B \ I \ U \ \mathscr{O} \ A \ \cdots$ Add any additional information and links to send to people that book this service with you. They will see this content in	the selected fields below.	
I day: Just a quick reminder that your ser \bigotimes \bigotimes \bigotimes Add an email reminder Additional Information for Email Confirmation \bigotimes A A° B I \bigcup \bigotimes \ldots Add any additional information and links to send to people that book this service with you. They will see this content in \ldots \ldots	Modify	
Add an email reminder Additional Information for Email Confirmation Image: A A° B I U ∠ A Add any additional information and links to send to people that book this service with you. They will see this content in	Reminders and Confirmations	
Add an email reminder Additional Information for Email Confirmation Image: A A° B I U ∠ A Add any additional information and links to send to people that book this service with you. They will see this content in	1 day : Just a quick reminder that your ser 🔗 🖉 🗙	
Additional Information for Email Confirmation $\checkmark A A^{\circ} \mathbf{B} I \sqcup \mathscr{A} A^{\circ} \cdots$ Add any additional information and links to send to people that book this service with you. They will see this content in	Add an email reminder	
Add any additional information and links to send to people that book this service with you. They will see this content in	Additional Information for Email Confirmation	
that book this service with you. They will see this content in	🖋 🗛 A° B I <u>U</u> 🖉 <u>A</u> …	
	that book this service with you. They will see this content in	



Use the default scheduling policy cheduling policy titings for when customers can book services me increments innum lead time immum lead time for bookings and ancelision (in hours) taximum number of days in advance that a obing can be made mail notifications 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. taff Allow customers to choose a specific person for the booking wailability generat, a service can be booked when its staff are free. If you is to customize this further, you can do so below. eneral availability: Bookable when staff are free
Show available times in increments of: Minimum lead time Minimum lead time for bookings and concellations of how? Maximum number of days in advance that a booking can be made Email notifications 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. Staff Allow customers to choose a specific person for the booking Availability In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below. General availability:
Scheduling policy Settings for when customers can book services Time increments Show available times in increments of: Minimum lead time Maximum number for bookings and cancellations (in houry) Maximum number of days in advance that a booking can be made Email notifications Solity the business via email when a booking is created or changed Send a meeting invite to the customer. In addition to the confirmation email. Staff Allow customers to choose a specific person for the booking Allow customers to choose a specific person for the booking Allow customers to choose a specific person for the booking Maximum numbers to choose a specific person for the booking Maximum customers to choose a specific person for the booking Allow customize this further, you can do so below. Staff Bookable when staff are free
Settings for when customers can book services Time increments Show available times in increments of: Minimum lead time 30 minutes Minimum lead time for bookings and 12 Concellations (f) hours) 30 Maximum lead time for bookings and 30 Maximum lead time for bookings and 12 Maximum lead time for bookings and 30 Maximum number of days in advance that a 30 Maximum number of booking is in advance that a 30 Email notifications 30 Molify the business via email when a booking is created or changed Send a meeting invite to the customer, in addition to the confirmation email. Staff Allow customers to choose a specific person for the booking Audiability In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below. General availability: bookable when staff are free
Time increments 20 minutes Show available times in increments of: 20 minutes Minimum lead time 12 Minimum lead time for bookings and cancellations (fn hour) 30 Maximum number of alays in advance that a booking can be made 30 Email notifications 30 Imaged Series and a meeting invite to the customer, in addition to the confirmation email. Staff Aliow customers to choose a specific person for the booking Availability In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below. General availability:
Show available times in increments of: 30 minutes V Minimum lead time for bookings and cancellations (in hord) 12 Image: Cancellations (in hord) Maximum lead time for bookings and cancellations (in hord) 30 Image: Cancellations (in hord) Maximum number of days in advance that a booking can be made 30 Image: Cancellations (in hord) Email notifications 30 Image: Cancellations (in hord) Maximum starting invite to the customer. In addition to the confirmation email. Staff Allow customers to choose a specific person for the booking Availability In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below. General availability: Bookable when staff are free
Minimum lead time for bookings and carcellations (in hour) Maximum lead time for bookings and carcellations (in hour) Maximum number of days in advance that a Booking can be made Email notifications Send a meeting invite to the customer. In addition to the confirmation email. Staff Allow customers to choose a specific person for the booking Allow customers to choose a specific person for the booking Allow customers to choose a specific person for the booking Automation to the customer in addition to the confirmation email. Staff Maximum staff are free. If you wish to customize this further, you can do so below. General availability: Bookable when staff are free.
Maximum number of days in advance that a 30 (2) booking can be made Email notifications Solution of the second s
 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. Staff Allow customers to choose a specific person for the booking Availability In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below. General availability: Bookable when staff are free
Allow customers to choose a specific person for the booking Availability In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below. General availability: Bookable when staff are free
Availability In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below. General availability: Bookable when staff are free
In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below. General availability: Bookable when staff are free
wish to customize this further, you can do so below. General availability: Bookable when staff are free
Bookable when staff are free $\qquad \sim \qquad$
+ Set different availability for a date range

The following options are available to configure your services:

- Service name, description, and location
- Online meeting

• Includes a link in the appointment to join a Microsoft Teams meeting

- Default appointment duration
- Appointment buffers
- Maximum number of attendees
- Set required fields and create custom fields to include on the booking form



 ✓ Ok + Add a question ✓ Customer information Select what customer details you want displayed on the booking page. Name is always required. Customer email Required Required Customer address Required Customer notes Required Select custom fields to add to the service. Are you a staff member or a student? Required Department: Required Custom fields display order Custom fields display order Custom fields in the order you want. 	
Select what customer details you want displayed on the booking page. Name is always required. Customer email Required Required Customer address Required Customer notes Required Required Custom Fields Select custom fields to add to the service. Are you a staff member or a student? Required Required Department: Required Custom fields display order Following is the current order of custom fields. To change the order, clear selection and reselect	\checkmark Ok + Add a question \checkmark
Phone number Required Customer address Required Customer notes Required Custom Fields Required Select custom fields to add to the service. Required Are you a staff member or a student? Required Department: Required Custom fields display order Required Following is the current order of custom fields. To change the order, clear selection and reselect	
Customer address Required Required Custom Fields Required Select custom fields to add to the service. Are you a staff member or a student? Required Department: Required Custom fields display order Required Required 	Customer email Required
Customer notes Required Custom Fields Select custom fields to add to the service. Are you a staff member or a student? Required Department: Required Custom fields display order Required Following is the current order of custom fields. To change the order, clear selection and reselect	Phone number Required
Custom Fields Select custom fields to add to the service. Are you a staff member or a student? Department: Custom fields display order Following is the current order of custom fields. To change the order, clear selection and reselect	Customer address
Select custom fields to add to the service. Are you a staff member or a student? Department: Custom fields display order Following is the current order of custom fields. To change the order, clear selection and reselect	Customer notes
Department: Required Custom fields display order Following is the current order of custom fields. To change the order, clear selection and reselect	
Custom fields display order Following is the current order of custom fields. To change the order, clear selection and reselect	Are you a staff member or a student?
Following is the current order of custom fields. To change the order, clear selection and reselect	Department:
	Following is the current order of custom fields. To change the order, clear selection and reselect

Are you a staff member or a student? Department:

- Configure email reminder text
- Configure scheduling policy or use the default settings configured on the Booking page



E

Microsoft Bookings User Guide

Business Information

Business information

Business hours

Enter an address and contact information for your
business. This will be used on the booking form and in
booking messages and reminders.

usiness name	
Niagara College - PPO Test	Monday
usiness address	Tuesday
Add a location or a room	
usiness phone	Wednesday
	Thursday
end customer replies to	
msteglinski@niagaracollege.ca	Friday
Vebsite URL	Saturday
rivacy policy URL	
erms and conditions URL	
usiness type	
Colleges & Universities	

 \sim

Sunday		+				
Monday	8:00 AM	\sim	5:00 PM	\sim	×	+
Tuesday	8:00 AM	\sim	5:00 PM	~	×	+
Wednesday	8:00 AM	\sim	5:00 PM	\sim	×	+
Thursday	8:00 AM	\sim	5:00 PM	\sim	×	+
Friday	8:00 AM	\sim	5:00 PM	\sim	×	+
Saturday		Clo	sed		+	

Business logo

Currency CAD (\$)

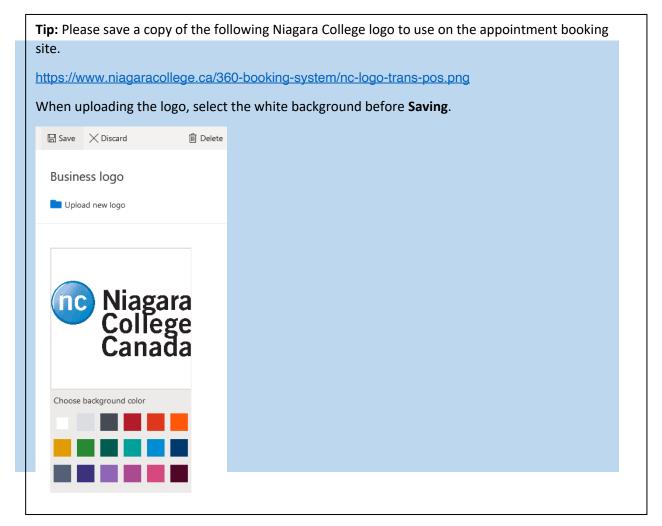
Add or change your business logo. This will appear in booking messages and reminders along with the business information you enter.



Provide information for your department including name, address, phone, email, logo, and business hours.







Deactivating the Booking Site

If you no longer require your Microsoft Bookings site, please request to have it removed by submitting an ITS Help Desk ticket <u>here</u>.





Booking Page

l hour					0	Project Reque	st	0
						1 hour		
					May	04		
< > Ma	y 2020					Select staff (option	al)	
Su Mo	Tu	We	Th	Fr	Sa	🏯 Anyone		~
				3	2			
3 4	5	6	7	8	9	10:30 am	11:00 am	11:30 am
10 11	12	13	14	15	16	12:00 pm	12:30 pm	1:00 pm
17 18	19	20	21	22	23	3:00 pm	3:30 pm	4:00 pm
24 25	26	27	28	29	30			
31			0	All times	are in (UTC-05:00)	Factern Time IUS & Canad	a)	
31			0,	All times .		Eastern Time (US & Canad ur details		
31 Name			0,	All times .		ur details	a) ow if you have any	special requests.
			0,	All times a	Add yo	ur details Please let us kno	ow if you have any	special requests.
Name	iber (opt	onal)	0,	All times .	Add yo	p ur details Please let us kno Thank you.	ow if you have any	special requests.
Name Email		onal}	0	All times a	Add yo	p ur details Please let us kno Thank you.	ow if you have any	special requests.
Name Email Phone nur		onal)	0,	All times .	Add yo	p ur details Please let us kno Thank you.	ow if you have any	special requests.
Name Email Phone nur		onal)	.0,		Add yc	p ur details Please let us kno Thank you.	ow if you have any	special requests.

On the **Booking** page, customers can select from the services you have setup, choose a date, and select a time to book. They can then fill out their information and book the appointment.

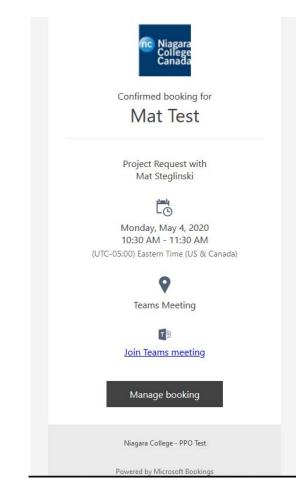
Niagara College Canada

Niagara College - PPO Test							
Upcoming booking for Mat Test							
Project Request							
Lo	Reschedule						
Monday, May 04, 2020 10:30 am (1 hour)	Cancel booking						
9	New booking						
Teams Meeting							
							
Mat Steglinski							
All times are in (UTC-05:00) Eastern Time (US & Canada)							
5							
Powered by Microso © 2019 Microsoft + Pri							

After booking the appointment, users can reschedule, cancel, or book another appointment.

Customers and the staff the appointment is booked with will receive a confirmation email that contains the details of the booking as well as a link to join an MS Teams meeting (If configured).



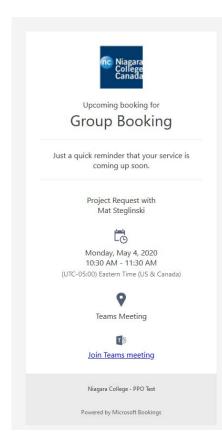


Customers will also receive a separate email to add the appointment to their appropriate calendar. For the staff who the appointment is booked with, the appointment will be automatically added to their Outlook calendar.



	MONDAY	
	4	
7 AM		
3	Weekly Project Update 🚓	Consultation - Michelle
2		Our office address Niagara College - Test
)		Huguna conege - rest
1	Travel Tracking - Map Curre	nt Process
	Microsoft Teams Meeting	in Process
2	Mat Steplinski	
	Project Request - Teams Meeting	
1	Niagara College - PPO Test	
2 PM		
2		
1		
2	Travel Application	
	Teams Cole Hayes	
3		

One day prior to the appointment, the user and the staff member will receive and email reminder that includes the date and time of the appointment:





Appendix A – Document History

Major Revisions

Identify each published version.

Version	Date	Modified By	Description
1.0	7/20/2020	Mat Steglinski	Document Created