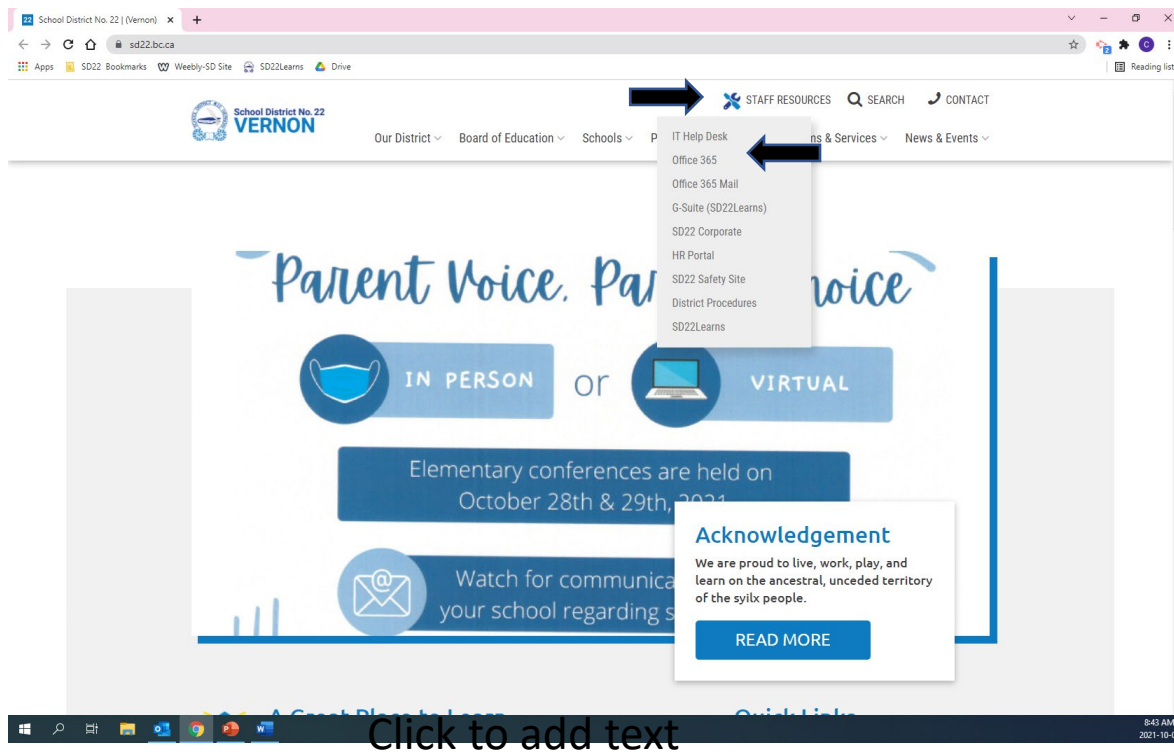
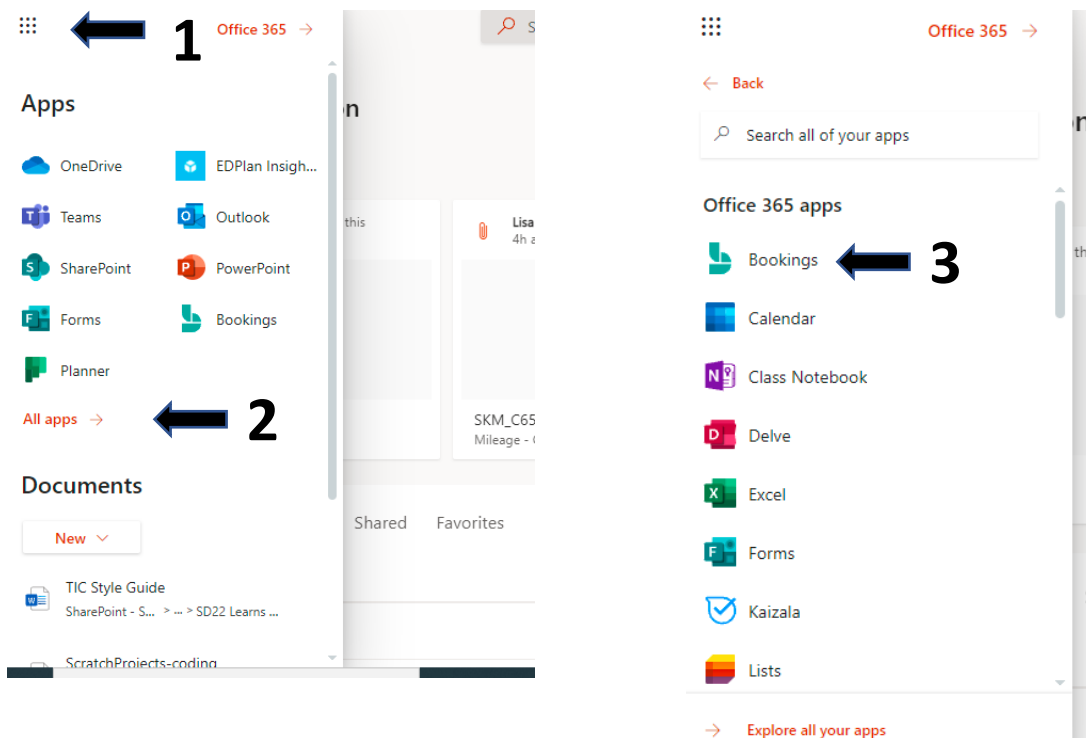


How to Set-up a Bookings Calendar for Fall Conferences –**New** Bookings

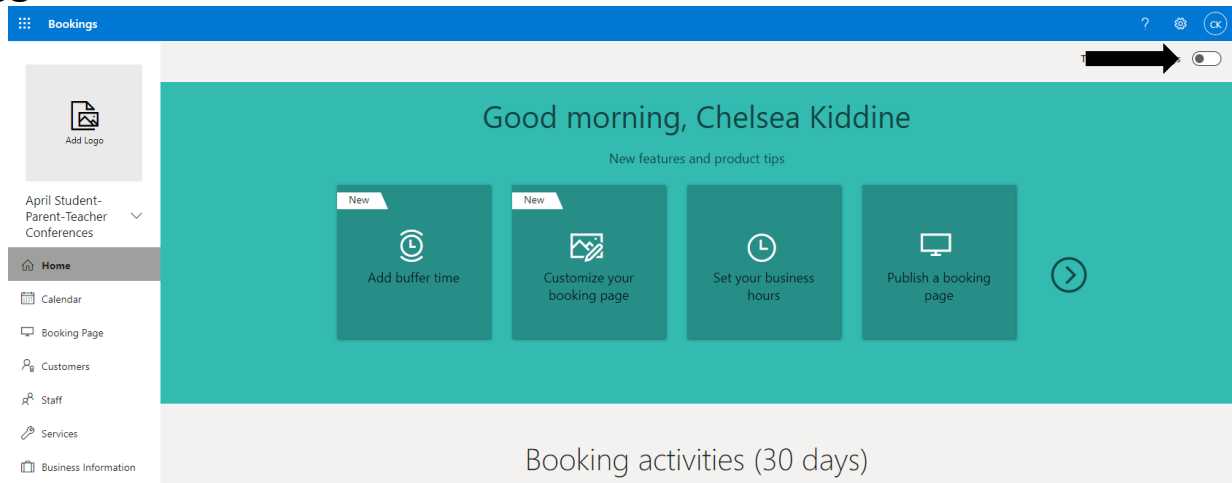
Step 1: Head to www.sd22.bc.ca and access the Office 365 link from staff resources.



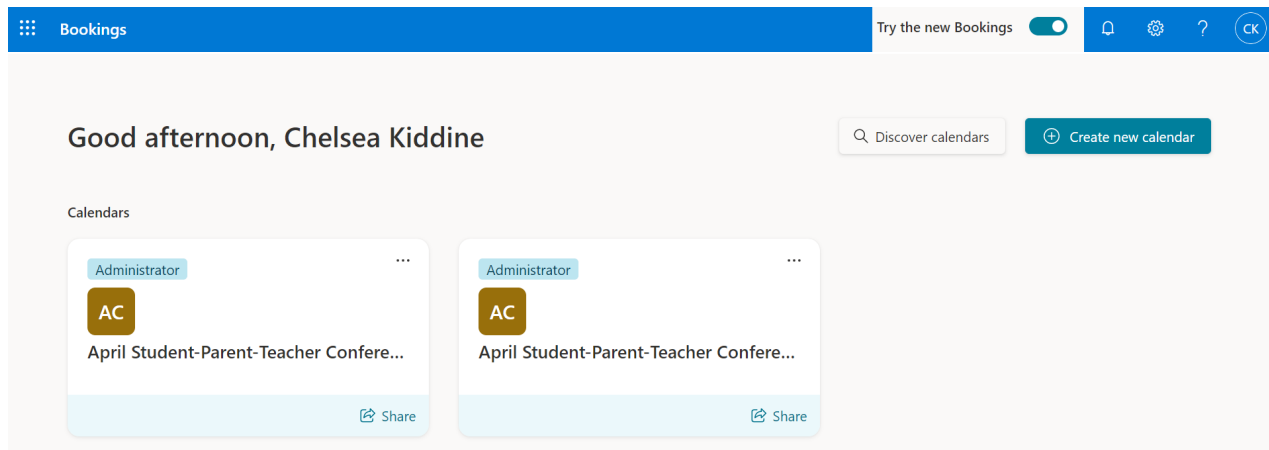
Step 2: Select bookings from the available apps on the left-hand side of the screen. You may need to follow the steps outlined in the diagram as 1,2,3 to locate it on your device.



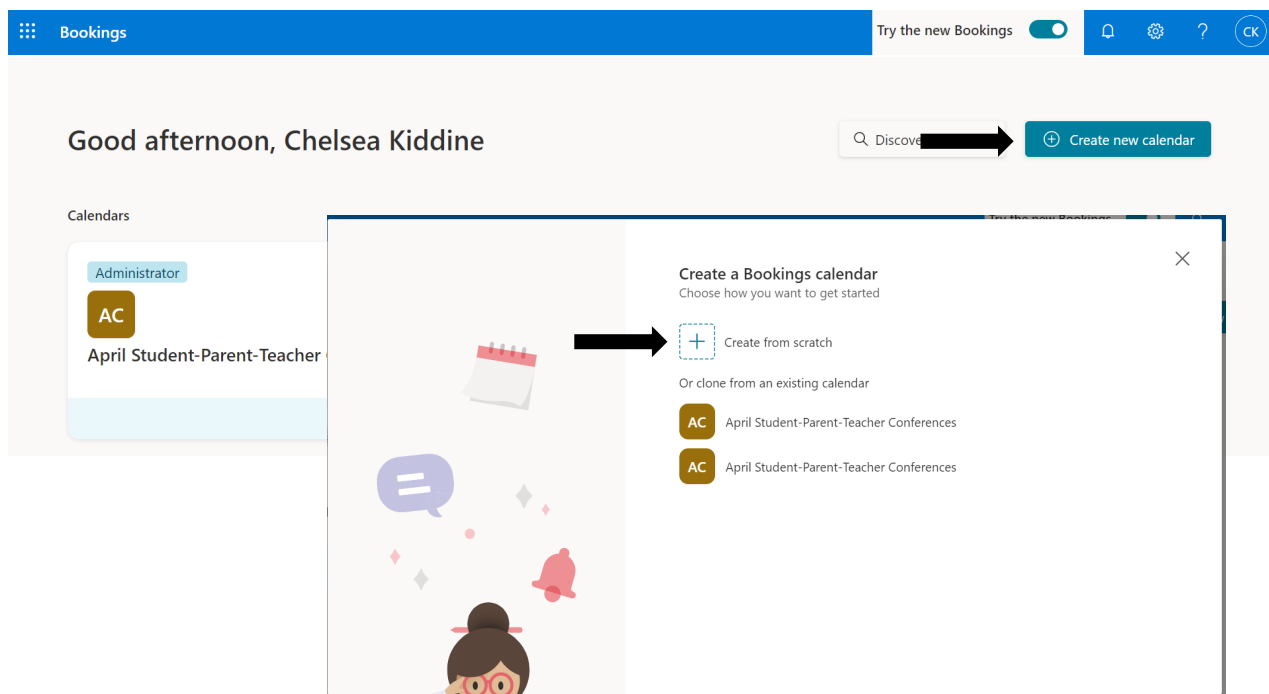
When you open the bookings app you will be greeted with this home page. If you haven't done it yet, toggle to the new bookings page, by selecting the toggle labeled with the arrow.



If you see the homepage above, ensure you toggle to get the new bookings page as shown below.



Step 3: Create a new booking-This infographic will cover creating a bookings calendar from scratch. To see how to edit a cloned calendar see the infographic on the learns site.



Step 5: Name your Calendar and click create calendar. Name your calendar something that will make sense to you. This is the title that will be posted on your bookings page. **Ensure you name your calendar with the month and year as they cannot be deleted.**

Step 1 of 4

Create a new Bookings calendar

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., businessnamePM-Consulting@microsoft.onmicrosoft.com).

Name *
Give your calendar a name

Business type
Choose a business type

Business hours ⓘ
Mon-Fri, 8:00 AM - 5:00 PM
[Change](#)

Step 6: Invite staff, you will want to add all the teachers in your school, when you start typing their names, they will appear in a drop down. Everyone is added as a “Team Member” by default which means teachers will be able to set their own hours to account for breaks etc. without having access to other staff members calendars.

Step 2 of 4

Invite staff

Invite people who need access to this calendar. You can always add more people and make changes later.

① Invited staff will be assigned the Team member role by default. You can assign different roles to ensure they have adequate access. [Learn more about roles](#)

Search for people in your organization

- BO Bradley Ogasawara
- KB Kristin Beeby
- DC Danielle Calder

Administrator

←

← Previous Next

Step 7: You will be prompted to create your service here, click next for now as we will create and edit services within the calendar at a later step.

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.

① You'll be able to add more services and customize later on.

30-min meeting ⓘ

30 mins, Mon-Fri, 9:00 AM - 5:00 PM
[Change](#)

← Previous Next

Step 8: Ensure that you choose “anyone” for who can book appointments to ensure that all parents can access the information.

Step 4 of 4

Choose who can book appointments

Set permissions for who can see the bookings page, check availability, and book appointments.

The screenshot shows three options for who can book appointments:

- No self-service**: Schedule appointments only from the Bookings app.
- People in my organization**: People can book with an internal self-service page.
- Anyone**: People can book with a public self-service page. This option is selected.

At the bottom, there is a 'Previous' link and a 'Create calendar' button.

Step 9: Select “Booking page” from the left navigation menu and click the down arrow by “Business page access control” Click to disable direct search engine indexing. We only want people with the link to book.

The screenshot shows the 'Manage your booking page' settings page. The left navigation menu has 'Booking page' selected. The main content area shows the 'Business page access control' section with the following options:

- ☒ **Disable direct search engine indexing of booking page** [Learn more](#)
- ☐ **Require a one-time password to create bookings**

Step 10: Now select the down arrow by “Default scheduling policy”.

The screenshot shows the 'Default scheduling policy' settings page. The left navigation menu has 'Default scheduling policy' selected. The main content area shows the following settings:

- Time increments**: Show available times in increments of 15 minutes.
- Minimum lead time**: Minimum lead time for bookings and cancellations is 24 hrs.
- Maximum lead time**: Maximum days a booking can be made advanced in is 365 days.
- Email notifications**:
 - ☐ Notify the business via email when a booking is created or changed
 - ☐ Send a meeting invite to the customer
- Staff control**:
 - ☒ Allow customers to choose a specific person for the booking

Continue step 10 to set up availability for your booking page.

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:

Not bookable

▼

← Ensure the general availability is not bookable. This will ensure that it doesn't open every Tuesday and Thursday. Only the two days that conferences are taking place. You will want to set the start and end as October 27 and October 28.

Availability during these dates:

🗑️

Start

10/27/2022

📅

End (inclusive)

10/28/2022

📅

Custom hours (recurring weekly)

▼

^

Monday	Not bookable		+	
Tuesday	Not bookable		+	
Wednesday	Not bookable		+	
Thursday	12:00 PM ▼	8:00 PM ▼	🗑️	+
Friday	12:00 PM ▼	8:00 PM ▼	🗑️	+
Saturday	Not bookable		+	
Sunday	Not bookable		+	

← When you set the times ensure you set a start and end times that covers the whole interview period. Teachers will be able to go in and set their own hours to account for a dinner break etc.

Step 11: Now click the down arrow by “Customize your page”. Here you can change the page template between New and Classic (I personally feel “New” looks sharper), change your colours or choose a logo. If you want to view the layout you can click on the link at the top under “Your booking page”. Once you are done ensure you click “Save” at the top.

Customize your page

Customize the bookings page to go with the brand of your organization.

Page template

☒ New
☐ Classic

Color theme

☐ Set custom color for your booking page

Logo

☒ Display business logo on your booking page

Bookings page preview

← This will import your logo that you will add in the business page step.

Step 12: Using the left navigation menu click “Business information”. Here is where you can add your school logo as well as set your business hours, this will save you a lot of time if you are doing a central calendar for all your staff. Click the down arrow by “Business hours” and match your interview times. Ensure you click “Save” at the top.

Appointments

Calendar

Booking page

Customers

Staff

Services

Business information

Business logo

Add or change your that your customers booking page, remind messages.

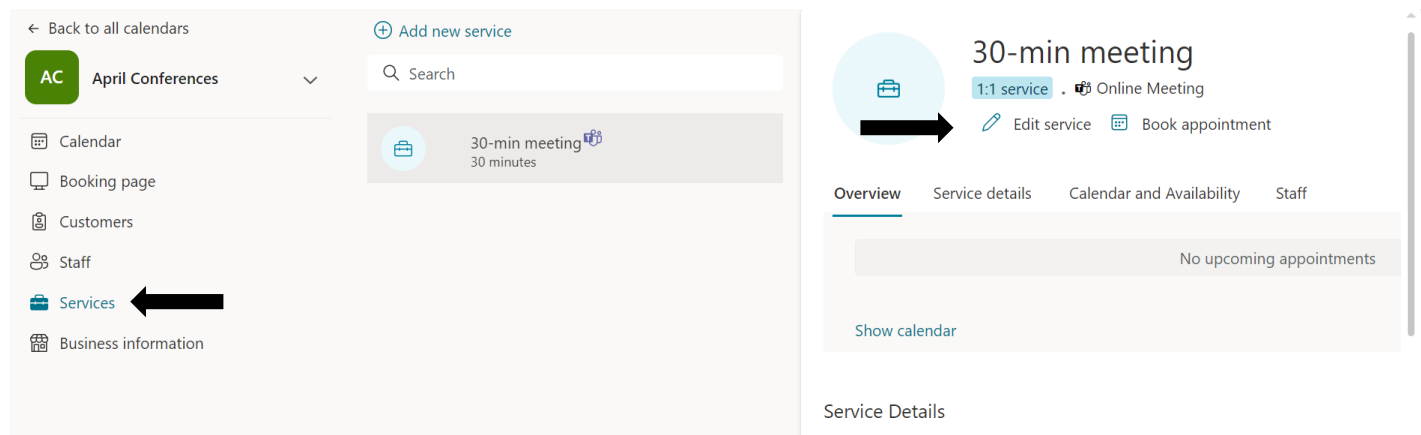
Add logo

Business hours

Enter information about your business hours

Monday	Day off		+	
Tuesday	Day off		+	
Wednesday	Day off		+	
Thursday	12:00 PM	8:00 PM	⌵	+
Friday	12:00 PM	8:00 PM	⌵	+
Saturday	Day off		+	
Sunday	Day off		+	

Step 13: Here you will access your “Services” from the left navigation menu and click “Edit service” make it reflects your schools needs.



Step 14: Basic Details. Here is where you will name your service, add a description, a location, and ensure that the teams meeting toggler is off as all conferences will be in person this year.

Edit service

This screenshot shows the 'Edit service' form with the 'Basic details' tab selected. The form includes fields for 'Name' (Fall Goal Setting Conference), 'Description', 'Location', and 'Duration' (0 days, 0 h, 15 min). There are also toggle switches for 'Add online meeting' and 'Buffer time'. A black arrow points to the 'Duration' field. At the bottom, there are 'Discard' and 'Save changes' buttons.

Step 15: When you scroll down you will see “Maximum number of attendees”. This is where you will change it to account for multiple families at one time. This is changing how many students/families can book into one time slot. If conferences are remaining one on one then this will stay 1, even in the case of separated families. Last “Save changes”

This screenshot shows the 'Edit service' form with the 'Scheduling options' tab selected. The form includes a toggle for 'Show this service on the booking page', a 'Duration' field (0 days, 0 h, 15 min), a 'Buffer time' toggle, a 'Price not set' dropdown, a 'Notes' field, a 'Maximum number of attendees' dropdown (set to 1), and a toggle for 'Let customers manage their appointment when it was booked by you or your staff on their behalf'. A black arrow points to the 'Maximum number of attendees' dropdown. At the bottom, there are 'Discard' and 'Save changes' buttons, with a black arrow pointing to the 'Save changes' button.

Step 16: Using the left navigation menu within Edit service choose “Availability options”. As you have set up your default scheduling policy for your conferences already all you have to do is toggle “use the default online scheduling and availability policy”

Edit service

Basic details

Availability options **Use the default online scheduling and availability policy**

Assign staff

Custom fields

Reminders and notifications

Publishing options

Show this service on the booking page

Scheduling policy

Time increments

Show available times in increments of 15 minutes

Minimum lead time

Minimum lead time for bookings and cancellations 24 hrs

Maximum lead time

Maximum days a booking can be made advanced in 365 days

Availability

Discard Save changes

Step 17: Using the left navigation menu within Edit service choose “Assign Staff”. As you have already added your staff to this booking calendar you simply need to select everyone that can be booked for this service.

Edit service

Basic details

Assign staff to the service

Allow customers to choose a particular staff for booking

Search for a staff member

Assign staff

Custom fields

Reminders and notifications

Chelsea Kiddine

Discard Save changes

Step 18: Using the left navigation menu within Edit service choose “Custom fields”. Here to where you can choose what information you collect from parents when a booking is made. You can add custom fields, I suggest adding one that collects the students first and last name.

Basic details

Custom fields

Customer information

Customer email

Phone number

Customer address

Customer notes

Required

Required

Required

Required

Custom fields

1 required and 0 optional custom fields selected.

Add a custom field

Selected

Student's name (First and Last)

Required

You can choose what information parents can leave and what is required. Ensure email is required.

You want your custom field selected and required.

Discard Save changes

Step 19: One the left navigation menu within Edit service you are going to choose reminders and notifications. This enables you to send a custom reminder to your parents the day before the interviews. You will scroll down and click “Add an email reminder” Once you have added your reminders click “Save changes” and you have completed all the steps of your service.

Reminders and confirmations

+ Add an email reminder

Email reminder

1 week

Send reminder to

Customer

Looking forward to seeing you to celebrate the sucesses your learner has had throughout the year so far!

Discard

Save Changes

Discard

Save changes

Step 21: Viewing your booking calendar and share your link. Always a good idea to go in and ensure that things look how you want, staff are available, and the times are correct. The icon with the stack of paper is how you will copy the link and share it out to your school community when you are ready.

AC April Conferences

Calendar

Booking page

Customers

Staff

Services

Configure booking page

Available to anyone

People on the internet can book with a public self-service page

Your booking page:

<https://outlook.office365.com/owa/ca...>

</> Embed