SETTING UP ADVISING APPTS IN "BOOKINGS"

- 1) Go to https://outlook.office.com/bookings/settings/services
- 2) Click on the "add new service" button (orange arrow).

::: Bookings		Try the new Bookings 💽 🚨 🔅 ?
NA Nicole McCauley Advising Calendar Customers Settings	Add new service Q Search Winter Quarter Advising Advising	Winter Quarter Advising Isi service If Gonline Meeting C Edit service Book appointment
Staff		No upcoming appointments
		ivo upcoming appointments
Services		Show calendar
⑦ Custom Fields		
Booking page		Service Details
Business information		Service booking page https://outlook.office3 O Duration 30 minutes Default price Free Image: Default location Nicole's Office (#1110) Image: Description We can meet in person Default price Free
		Show all service details
		Staff
		Nicole McCauley
		Show all assigned staff
(+) New Bookings Calendar		

3) Fill in details relevant to your Advising Appointments as the "service" you're adding. You'll only need to set this up one time; thereafter you can just edit your existing service to update it each quarter with new dates, times, details, etc.

:: Bookings			* * * * *		Ļ
NA Nicole McCauley Advising V	Add service			×	
🗊 Calendar		ê	Service name	Î	
 Customers Settings 	 Availability options Assign staff 	Ξ	Description		
8 Staff	 Custom fields Reminders and notifications 	۲	Location Model online meeting O		
 Custom Fields Booking page Business information 	Default scheduling options Use the default online scheduling policy Publishing options Show this service on the booking page	© \$€	Duration 0 0 0 days 0 0 0 h 30 0 min Composition Buffer time Price not set		3
	4	8	Maximum number of attendees 1) Iges	l
(+) New Bookings Calendar					

4) Under "basic details", I entered the following text under the title (*blue arrow*):

We can meet in person, by phone, or by Zoom. In your booking request, please type in a note to me that clarifies whether you're planning to meet IN PERSON at my office or type in your EMAIL or PHONE number so that I'll know whether to call you or email you our Zoom appointment details. Thanks!

::: Bookings					-	Try the new Bo
	Add new service			Minter Orienten Arhibien		
NA Nicole McCauley Advising 🗸	Q. Search	Edit service				*
🗊 Calendar		⊟ Basic details	ē	Winter Quarter Advising		- 18
Customers	Winter 30 min:	Availability options	=	We can meet in person, by phone, or by Zoom. In your booking request, please		- 18
Settings			$\mathbf{\Sigma}$	type in a note to me that clarifies whether you're planning to meet IN PERSON at my office or type in your EMAIL or PHONE number so that I'll know whether to call	-	- 18
&8 Staff		Coston neios	0	Nicole's Office (#1110) in Tech Center 🛛 🛛		- 18
Services		Reminders and notifications		Add online meeting ①		- 88
⑦ Custom Fields		Default scheduling options	©	Duration		- 18
Booking page		Use the default online scheduling policy		0 🗘 days 0 🗘 h 30 🗘 min		- 18
Business information		Publishing options Show this service on the		Buffer time		- 18
		Show this service on the booking page	\$E	Free V		- 18
			P	Notes		- 18
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			8	Maximum number of attendees		- 18
				1 🗘 attendees		- 18
				Let customers manage their appointment when it was booked by you or your staff on their behalf.		- 18
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				Discard Save	e chang	8

5) Under "availability options", I selected **30 minutes** for "time increments" and **1 hour** for "minimum lead time" for cancellations (*orange arrow*). Under "general availability" I chose **not bookable** (*green arrow*), but in the "available during these dates" section I entered my own **start and end date** and **custom hours** for that same day (*blue arrow*). Add in more custom dates and hours for more advising days.

🚍 Basic details	Scheduling policy		Â
Availability options	Settings for when customers can b	book services	
🖇 Assign staff	Time increments Show available times in increment	is of 30 minutes 🗸	
⑦ Custom fields	Minimum lead time		
Q Reminders and notifications	Minimum lead time for bookings a cancellations	and 1 hrs 🗘	
Default scheduling options	Maximum lead time Maximum days a booking can be	200 days 🗘	
Use the default online scheduling policy	made advanced in		
Publishing options	Availability		
Show this service on the booking page	In general, a service can be booke you wish to customize this further		
	General availability:		
	Not bookable	~	
	Availability during these dates		Ū
	Start	End (inclusive)	
	10/25/2021	10/25/2021	<u>Fill</u>
		dy)	
	Custom hours (recurring week		
	Custom hours (recurring week Monday 8:30 AM	✓ 5:00 PM ✓ ⊕ +	•

6) Under "assign staff", make sure you've selected yourself.

Edit service		
Basic details	Assign staff to the service	
Availability options	Allow customers to choose a particular staff for booking	
8 Assign staff	Q Search for a staff member	
 Custom fields Reminders and notifications 	Nicole McCauley	
Default scheduling options Use the default online scheduling policy Publishing options		
Show this service on the booking page		
		Discard Save changes

7) Under "custom fields", select the "customer information" options you want to require. I chose to add a "custom field" and create a required question with phone, Zoom or on-campus meeting preferences (green arrow).

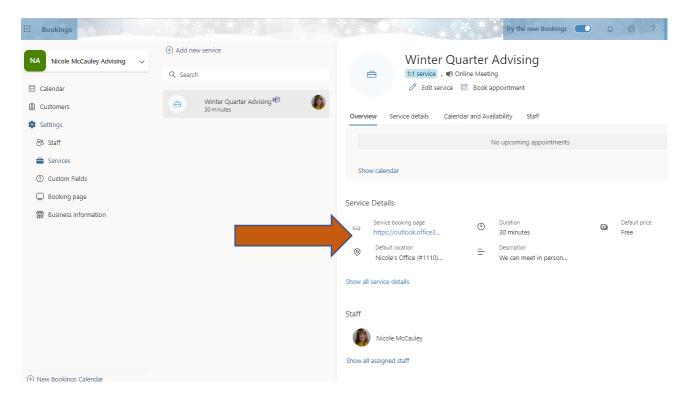
	Minter Orienten Arleisinen	
Edit service		*
Basic details	Customer information	
Availability options	Customer email	Required
🙁 Assign staff	Phone number	Required
⑦ Custom fields	O Customer address	Required
Q Reminders and notifications	 Customer notes 	Required
Default scheduling options Use the default online scheduling policy	Custom fields 1 required and 0 optional custom fields selected.	
Publishing options Show this service on the booking page	Selected Required How would you prefer to meet?	$\uparrow \downarrow$
	Phone	
	⊘ Zoom	
	On campus	
		_
	Discard	Save changes
		*

8) Under "reminders and notifications" I selected/activated all email and SMS options. You can choose to customize the text of your email confirmations and reminders. Click "save changes" and you'll return to your main settings page.

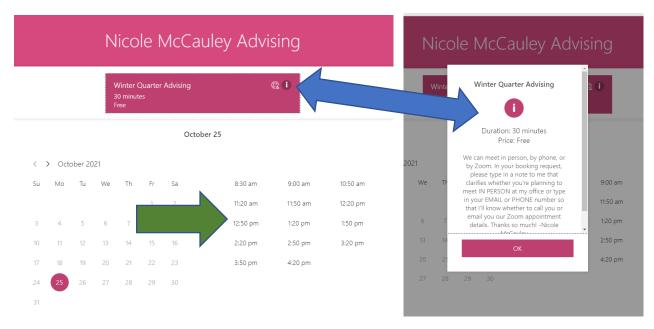
rvice			
	Edit service		*
	Basic details	Email and SMS notifications	188
/inter) mini	Availability options	Notify the business via email when a booking is created or changed	188
	Assign staff	Send a meeting invite to the customer, in addition to the confirmation email	186
	⑦ Custom fields	Enable text message notifications for your customer	100
	Q Reminders and notifications	Additional information for email confirmation	Ш
	Default scheduling options Use the default online scheduling policy		U.
L	Publishing options Show this service on the booking page	https://forms.office.com/Pages/ResponsePage.aspx? id=iEXT555nQUCm4lgXTCWxfu7Vrf7KlbZCrC3evhBPczFUOU1KOUcxRINR TUZDNVJQQ0xMRTZLTVczNi4u	U.
		Reminders and confirmations	U.
		Add an email reminder	U.
		1 day before: 🧷 🗊	U.
		Hil Just a friendly reminder that our advising appointment is scheduled See more	I
L		1 day before:	U
		Discard Save changes	Ţ

Be sure to ACTIVATE your account under the Bookings page. There should be an option asking to "Publish Booking Page".

9) Be sure to **copy your "service bookings page" link** (*orange arrow*) to share with advisees so they can sign up for an appointment with you! (For example, you could copy and paste the link into your Canvas Advising shell or into an email to advisees.)



10) Here is what your bookings page looks like to students, who will click on a time to book their appointment with you (green arrow). Appointment time options update immediately as advisees book remaining slots. If students click on the "i" icon (blue arrow), it pulls up the meeting description text you'd typed in during step #4.



11) Once students click on a time slot, they're guided to fill out the required contact details. Once they click the "book" button, they receive a confirmation email.

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17		19		21			3:50 pm	4:20 pm	
24	25		27						
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nicole.m			c.edu						
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