



Using Microsoft Bookings

Microsoft Bookings automates scheduling with a digital calendar and booking system. The calendar allows you to set up the time and dates you are available, set a location (virtual or in-person), and choose the duration of each appointment. It is integrated into Teams, so you can use the app to hold virtual meetings.

Common Uses

There are many ways to use Bookings, but common uses include:

- Parent-teacher conferences
- Interviews
- Staff evaluations
- Equipment checkout

Creating Your Bookings Calendar

1. Go to book.ms. Click **Get it now**, then **Add a booking calendar**.
2. Under Business Name, enter the desired name of your calendar, e.g., “Ms. Smith’s Honors Literature” or “Staff Evaluations.” Under Business Type, enter “K-12 school.”

Welcome to Bookings

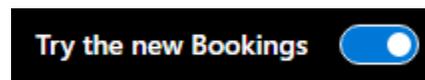
Tell us about your business

Technology Division

K-12 Schools

No thanks Continue

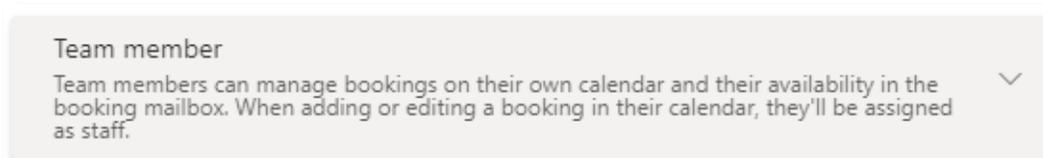
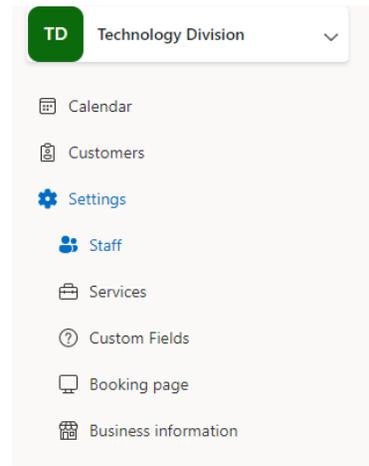
3. This creates your Bookings homepage. You should receive an email confirmation with an overview of the page. The following directions are for the most recent update to Bookings, so **be sure to toggle on “Try the new Bookings.”**





Adding Staff Members

1. *Each calendar must have at least one assigned staff member to conduct appointments.* To add staff to the page, click **Settings** on the left-hand menu. This reveals a list of any staff members already available for booking. To add new members, click **Add new staff** in the upper left.
2. Search for the user or group that you would like to add.
3. From this page, you can assign the staff member(s) a color for the calendar, enter a phone number, and change their individual availability.
4. To change a staff member's availability from the standard 8 A.M. – 5 P.M., toggle off "Use business hours." You can now edit their schedule.
5. To change the abilities a staff member has within Bookings, click "Team member" under their email and phone number. This pulls up a menu with several different permission settings.



- a. Staff are automatically given the rights of a Team member, meaning they can manage their own bookings and availability but cannot change anyone else's.
 - b. To give a staff member the rights to add/remove staff, create/edit/delete bookings, and edit all settings, make them an Administrator.
6. When you are finished, click **Save changes** to add the staff member.

Adding Services

1. After you have added staff members to the calendar, it is time to add a service. A service is the reason you are using Bookings: parent-teacher conferences, equipment checkout, interview slots, etc.



2. To create a service, click **Settings**, then **Services** on the left-hand menu of the Bookings homepage. This pulls up a list of services already offered on the page.
3. Click **Add service** at the top of the page.
4. Fill in details about how you want to use Bookings. There are many ways to create a service, so choose whatever best suits your needs.

- a. Under **Basic Details**, you can begin by naming the service and providing a brief description. For in-person meetings, you can add a location. **If it will be virtual, be sure to enable the Microsoft Teams integration by toggling Add online meeting.**

You can also adjust the duration of the appointment from its default of 30 minutes. To add buffer time between meetings, toggle “Buffer time” on and choose the desired setting.

- b. Under **Assign staff**, you can assign more staff members to a service. *At least one staff member must be assigned to each service*, but more than one can be assigned.
- c. Under **Reminders and confirmations**, you can set reminders for the appointment. The default setting is one reminder to the person who booked the appointment and one reminder to the staff member, one day before the meeting.

You can also add information here to the email confirmation sent out with each booking.

5. Save your changes to finish adding the service.
6. If you want to edit a service later, you can find it under **Settings > Services**. Select the desired service from the list and click **Edit service** from the page that pulls up on the right.
7. Once the service is set up, users will be able to book timeslots online using a link you provide them.

Add service

☰ Basic details

🕒 Availability options

👤 Assign staff

❓ Custom fields

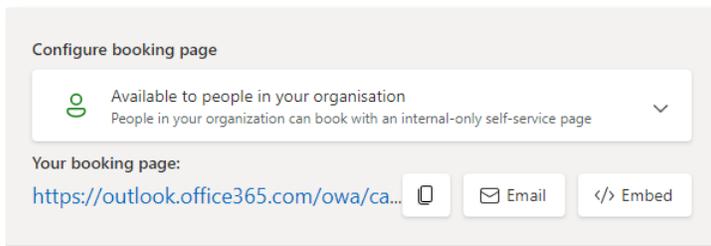
🔔 Reminders and notifications

 Edit service



Publishing Your Bookings Page

1. Users can book appointments through a link to the calendar you provide. First, navigate to **Settings** in the left-hand menu, then click **Bookings page**. Here, you can customize and publish your page.
2. There are many ways to customize the settings, including the following:
 - a. **Default scheduling policy:** This allows you to change settings like email notifications and availability. The automatic setting lets users book appointments any time when staff are free, and they can choose the staff member with whom they want to meet. However, you can restrict these settings.
You can also change amount of time required between booking and an appointment. With a lead time of four hours, for example, users cannot book an appointment less than 4 hours in advance.
 - b. **Customize your page:** Here, you can change the look of your page, e.g., color settings and logos.
3. Once the page is ready to publish, choose how you want your page to be available. This setting is under the **Configure page** drop-down menu. If you want it to be available only to other PCSD staff, choose **Available to people in your organization**. Otherwise, create a public page with **Available to anyone**.



4. Click **Save** at the top of the page.
5. A link to your published booking page will appear. Share the link in whatever manner you prefer.

How to Book

1. Users must have the link to the booking page to make an appointment. You can email this or embed it online.



2. From the booking page, they can view available timeslots on the calendar. Simply click on the desired day, and open appointments will populate on the right.
3. Scroll down to fill in details such as Name and Email Address, then click **Book**. Emails to the user and the staff member will be sent confirming the appointment.

4. If it is a virtual meeting, a Teams link to the meeting should be provided in the confirmation email.

Teams Integration

1. Bookings is available to integrate directly into Microsoft Teams. Add it to Teams by clicking the three dots underneath your existing Teams apps. (This can be found in the ribbon on the left side of Teams.)
2. Enter “Bookings” in the search bar.
3. Select Bookings and click **Add**.
4. When prompted, you can either create a new calendar or search for an existing one.
5. To switch between different calendars, click the name of the current calendar. This reveals a drop-down menu where you can navigate to another calendar.
6. If the integration is not working, check to ensure you have toggled **Add online meeting** in the settings of your services. *Note: The Bookings app within Teams can only be used for online bookings.*

Switch to
New booking calendar
Existing booking calendar



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Viewing Calendars

1. Booked appointments can be viewed on the calendar, found on the Bookings homepage. Simply click **Calendar** on the left-hand menu.
2. You can schedule time off and change the view of the calendar (by week, work week, month, etc.) [here](#).