

How to Setup a Microsoft Bookings Site

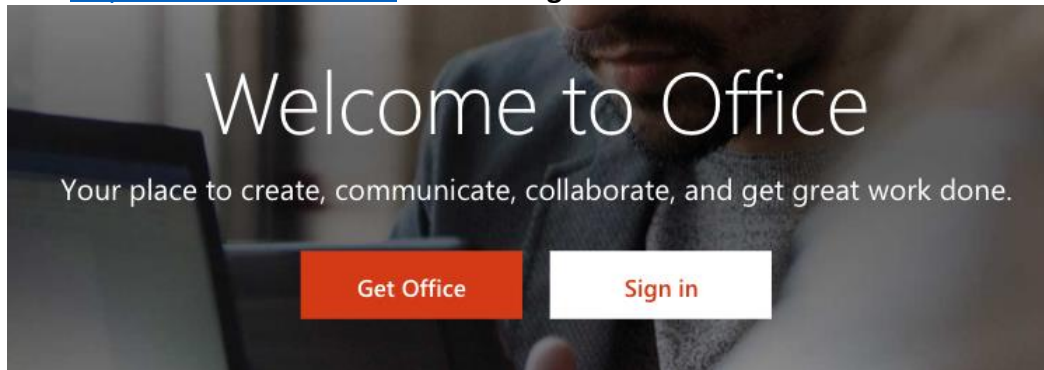
Introduction

Microsoft Bookings is an online application included for free with our LSUA Office 365 account. Bookings allows your students/advises/clients to schedule appointments with you without the need for a phone call or email.

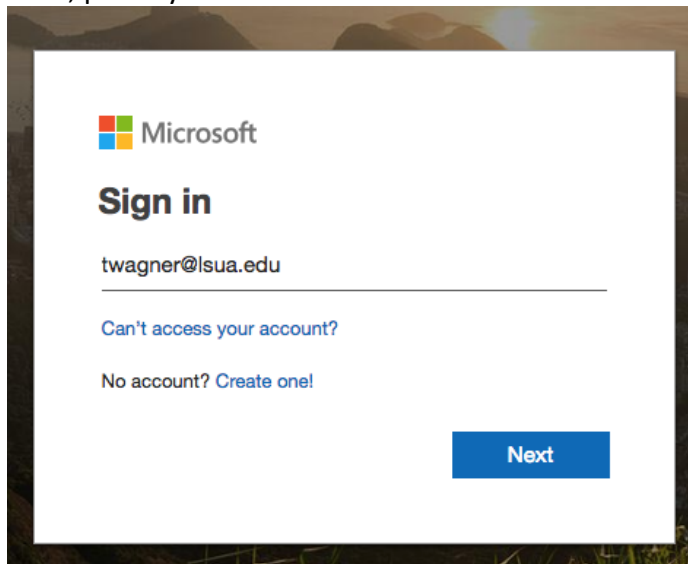
Within the Bookings' portal, you can manage your appointments, such as handling cancellations and rescheduling, sending appointment confirmations/reminders, all while automatically updating your Outlook calendar

Setup Microsoft Bookings for the First Time

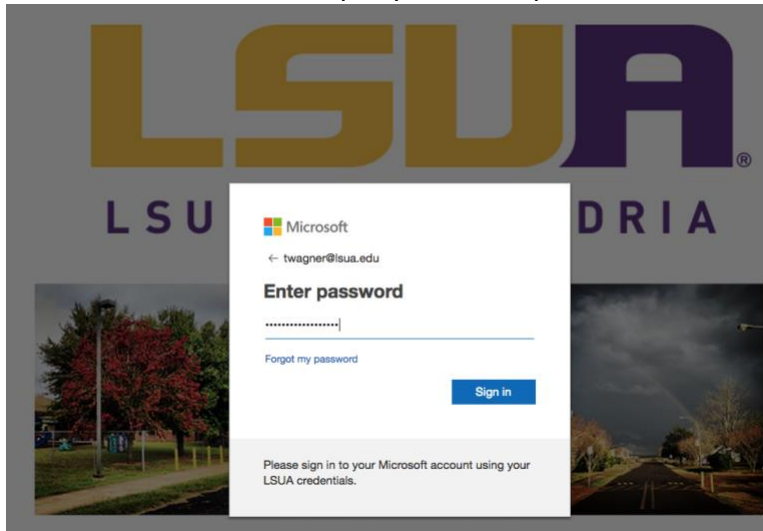
1. Visit <https://www.office.com/> and click **Sign In**.




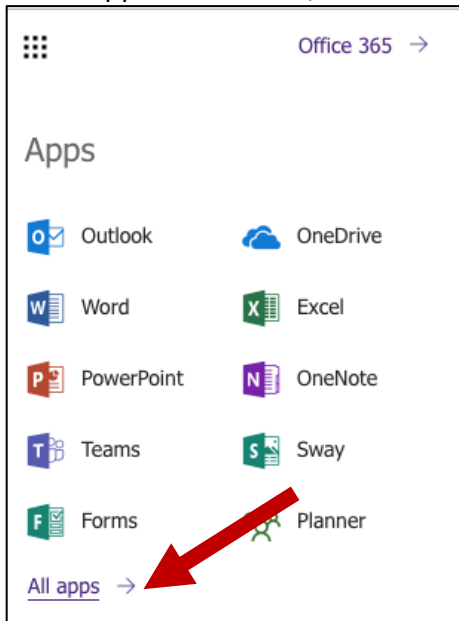
2. Next, put in your LSUA email address and click **Next**.



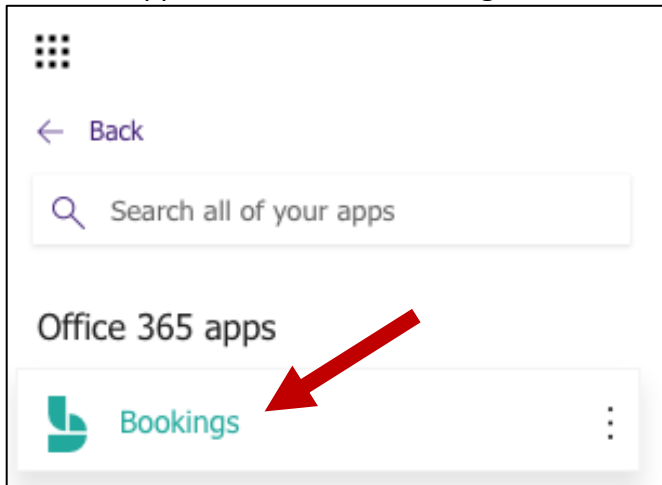
3. On the next screen, input your LSUA password and click **Sign In**.




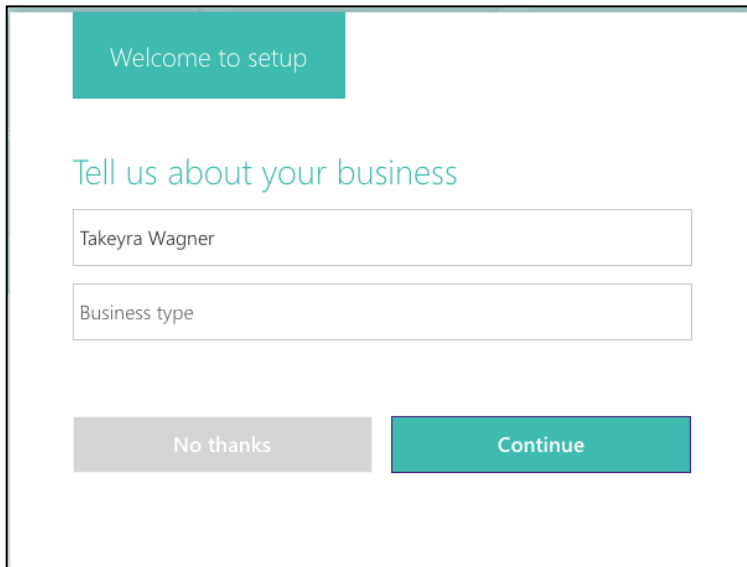
4. In the upper left corner, click the dotted square  and select **All Apps**.



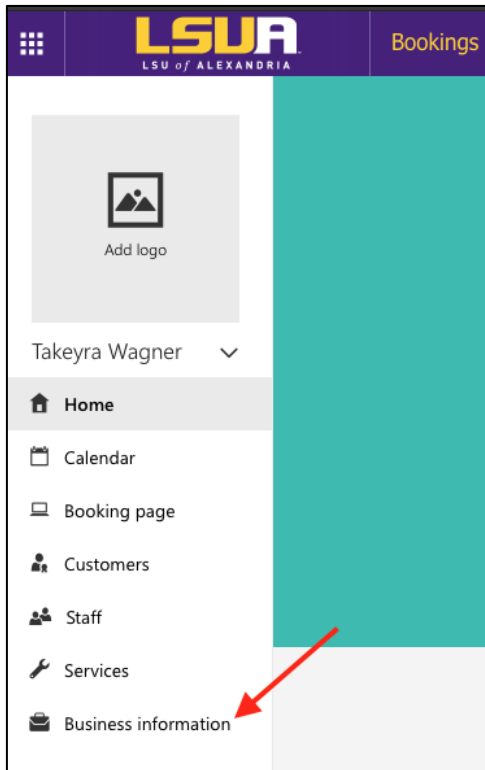
5. In the All apps menu, choose **Bookings**.



6. Microsoft Bookings will open. Click on the **Get it Now** button to begin. 
7. The next page will ask for two pieces of information: *Business name and Business type*. Put in your business name (or your First and Last Name). Business Type is not required. Click **Continue**.

A screenshot of the Microsoft Bookings setup screen. At the top, a teal banner says 'Welcome to setup'. Below that, the heading 'Tell us about your business' is displayed. There are two input fields: the first contains 'Takeyra Wagner' and the second is labeled 'Business type'. At the bottom, there are two buttons: a grey 'No thanks' button and a teal 'Continue' button.

8. Once your page loads, the first section you should work on is your *Business Information*. Click **Business Information** in the left menu.



9. On the Business Information page, you can enter your business address, other contact information, upload a business logo, and set up your business hours.

The screenshot shows the 'Business information' page. It features a left sidebar with the same navigation menu as in the previous image. The main content area is divided into three sections:

- Business information:** Contains a 'Save' and 'Discard' button, a description, and several input fields: Business name (filled with 'Takeyra Wagner'), Business address, Add a location, Business phone, Send customer replies to (filled with 'twagner@lsua.edu'), Website URL, Privacy policy URL, Terms and conditions URL, Business type, and Currency (set to 'USD (\$)').
- Business hours:** Contains a description and a table for setting hours for each day of the week.

Day	Start Time	End Time	Status
Sunday			Closed
Monday	8:00 AM	5:00 PM	Open
Tuesday	8:00 AM	5:00 PM	Open
Wednesday	8:00 AM	5:00 PM	Open
Thursday	8:00 AM	5:00 PM	Open
Friday	8:00 AM	5:00 PM	Open
Saturday			Closed
- Business logo:** Contains a description and a large image placeholder with a 'Change' button below it.

10. Next, set up your service offerings. Click **Services** from the left menu.

By default, Microsoft Bookings will add a service called “Initial Consult”. You can click the pencil next to this service and make it your own, OR you can add a new service by clicking **Add a service** at the top of the screen.

The screenshot displays the Microsoft Bookings interface for managing services. The top navigation bar includes the LSUA logo and the 'Bookings' title. Below the navigation bar, there is a '+ Add a service' button with a red arrow pointing to it. The main content area is titled 'Manage services' and includes the instruction 'Create and edit your bookable services'. A table lists the services, with the following data:

Service	Duration	Default Price	Payment required	Assigned staff
Initial consult	1 hour	Price not set	None required	No staff assigned

Red arrows also point to the 'Services' menu item in the left sidebar and the edit (pencil) icon for the 'Initial consult' service.

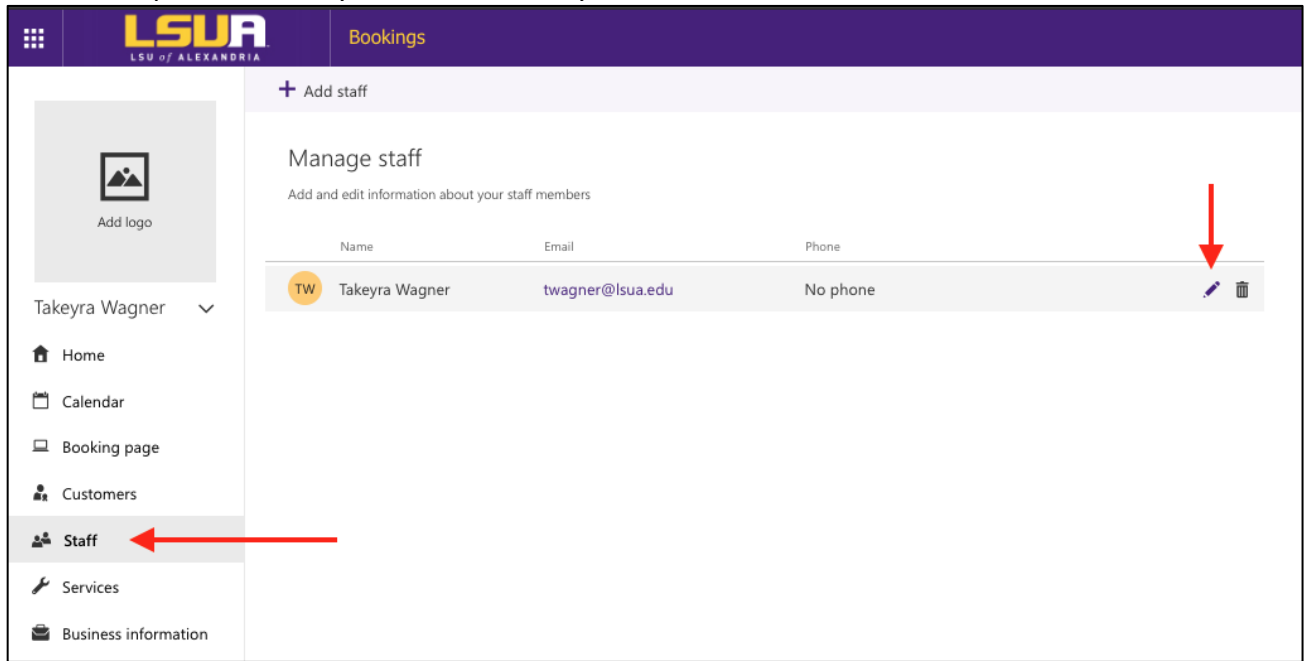
11. Once you're on the service-editing screen, enter your service details including name, description, and location. When you start typing an address in *Default location*, suggested locations will populate. Below are explanations for the other fields on the service-editing screen.

- **Duration:** You can enter how long you want the duration to last in days, hours, minutes, and set a buffer time when customers cannot book.
- **Reminders:** You can have the system send customers email reminders before their scheduled appointment. Click the pencil to edit the text.
- Leave **Publishing options** checked.
- **Online Scheduling options:** This is where you can manage the settings for when customers can book services.
 - You can choose to use the default scheduling policy by leaving the option checked, OR
 - You can manage the settings for your scheduling policy by unchecking the option. If you choose this option, we recommend setting the Minimum lead time to 24 and the Maximum lead time to 30 days.
- Be sure to click **Save** at the top of the Services page.

The screenshot displays the 'Bookings' service editing interface for 'Takeyra Wagner'. The interface is organized into several sections:

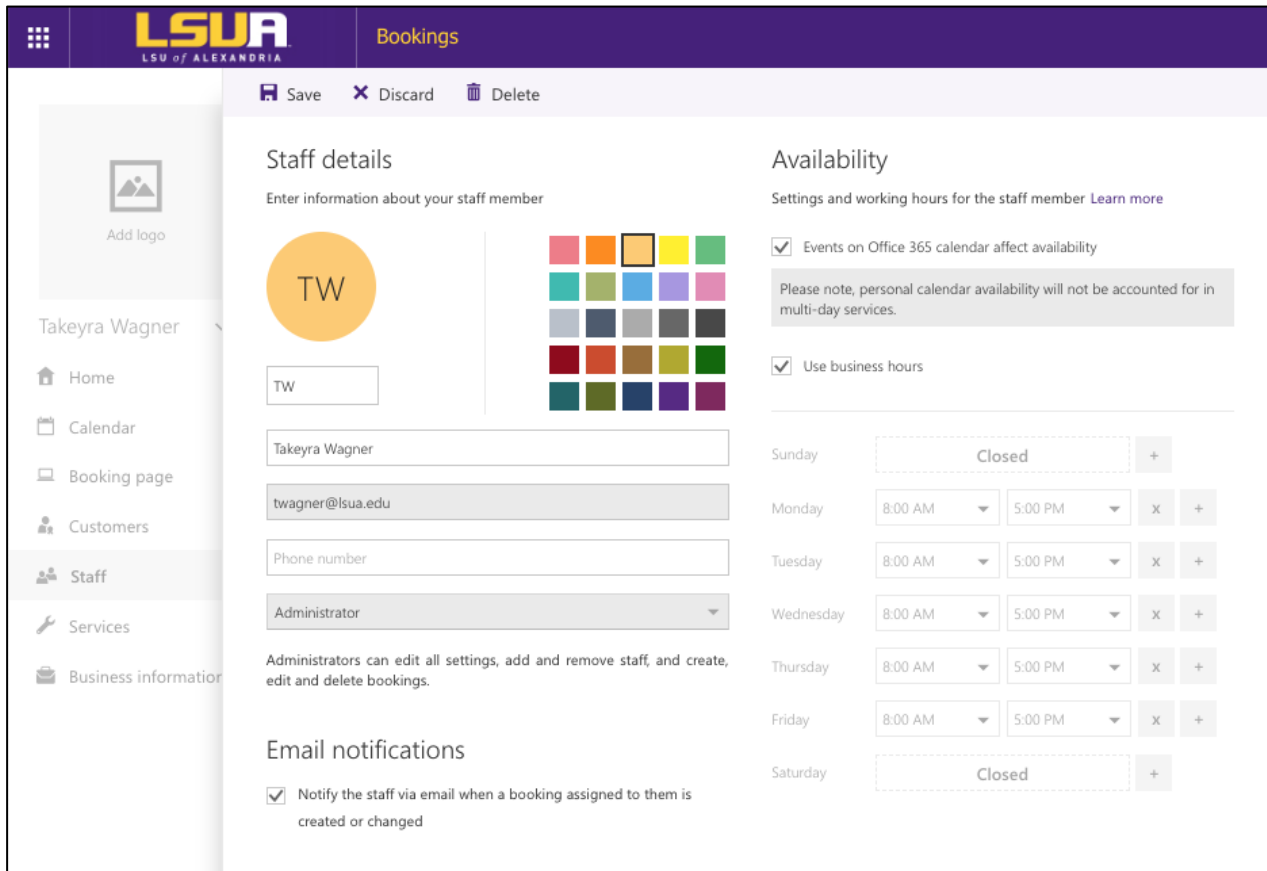
- Service details:**
 - Service name:** Takeyra Wagner
 - Description:** Not sure what you need? Grab 60 minutes with us and we will work with you to understand your goals, and to develop a proposal and price estimate.
 - Default location:** Our office address
 - Default duration:** Days: 0, Hours: 1, Minutes: 0
 - Buffer time your customers can't book:** Off
 - Default price:** Price not set
 - Notes (internal only):** This is where you can add notes about this service that only you and your staff see.
- Assign staff:**
 - Publishing options:** Show this service on the booking page
 - Online Scheduling options:** Use the default scheduling policy
 - Scheduling policy:** Settings for when customers can book services
 - Time increments:** Show available times in increments of: 30 minutes
 - Minimum lead time:** Minimum lead time for bookings and cancellations (in hours): 24
 - Maximum lead time:** Maximum number of days in advance that a booking can be made: 365
 - Email notifications:** Notify the business via email when a booking is created or changed
 - Staff:** Allow customers to choose a specific person for the booking

12. After adding and saving your service(s), click **Staff** from the left navigation pane. Click the pencil next to your name to edit your information.



13. On this page, you can add information about you including your office number and whether to receive email notifications (we recommend to keep this option checked).

By default, the system will set the availability to the business hours that were set in the Business Information section.



14. Next, select **Booking page** from the left navigation pane.
- Booking page Status:** Since this is the first time you are setting up your Bookings page, your status is set to **Not published**. Once you finish customizing your page and clicking Save, the status will change to **Published**.
 - Customer data usage consent (optional):** Where you can customize a message for your visitors to consent to your site collecting their personal data.
 - Scheduling Policy:** Where you can set site-wide scheduling polices. We recommend the following settings:
 - Minimum lead time: 24
 - Maximum lead time 30
 - Email Notifications:** Notifies you when an appointment is made.
 - Staff:** You can allow customers to choose who they want to meet with. However, you can uncheck this option if you do not have any staff.
 - Customize your page:** Choose a color theme for your bookings page. We recommend the purple theme!
 - Lastly, click Save and Publish!**

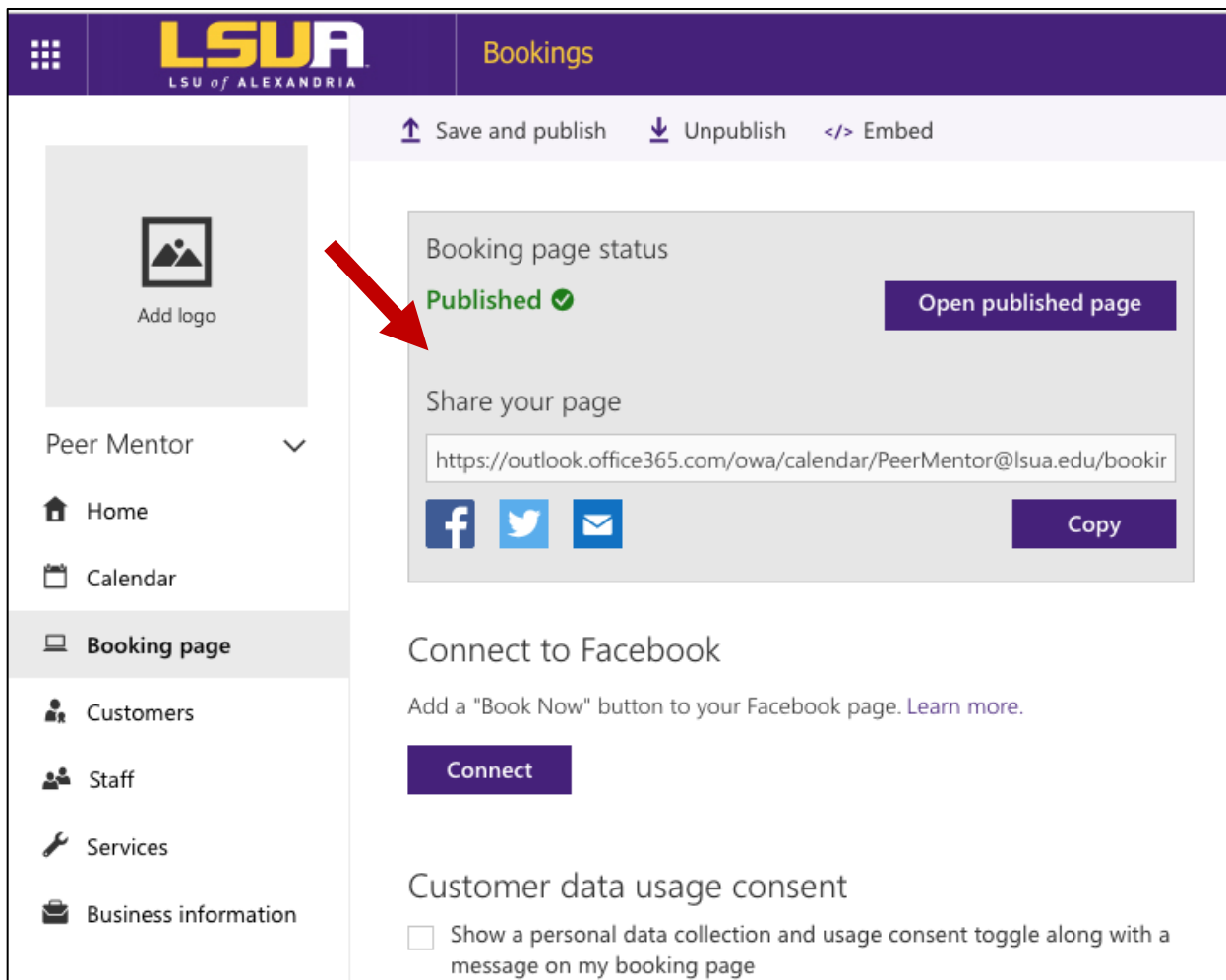
The screenshot displays the LSUA Bookings management interface. The top navigation bar includes the LSUA logo and the word "Bookings". Below the navigation bar, there are buttons for "Save and publish", "Unpublish", and "Embed".

The main content area is divided into several sections:

- Booking page status:** Shows "Not published".
- Customer data usage consent:** Includes a checkbox for "Show a personal data collection and usage consent toggle along with a message on my booking page" and a text area for "Enter your personal data collection and usage terms here."
- Scheduling policy:** Settings for when customers can book services.
 - Time increments: 30 minutes (dropdown menu)
 - Minimum lead time: 24 (input field)
 - Maximum lead time: 365 (input field)
- Email notifications:** Includes a checked checkbox for "Notify the business via email when a booking is created or changed".
- Staff:** Includes a checked checkbox for "Allow customers to choose a specific person for the booking".
- Customize your page:**
 - Choose your color theme: A preview of the booking page with a color theme selector.
 - Color theme: A grid of color swatches, with the purple theme selected.
 - Logo: A checked checkbox for "Display business logo on your booking page".
 - Region settings: A link for "Change language and time zone settings".

The left navigation pane shows the user "Takeyra Wagner" and a menu with options: Home, Calendar, Booking page (selected), Customers, Staff, Services, and Business information.

15. Once you click Save and publish, your Bookings site is now live. You can view your published page by clicking **Open published page** and share your page with others by copying the link.



The screenshot displays the 'Bookings' management interface for LSU of Alexandria. The top navigation bar includes the LSU of Alexandria logo and the title 'Bookings'. Below the navigation bar, there are three main sections: a left sidebar, a top action bar, and a main content area.

Left Sidebar: Contains navigation options: 'Add logo', 'Peer Mentor' (with a dropdown arrow), 'Home', 'Calendar', 'Booking page' (highlighted), 'Customers', 'Staff', 'Services', and 'Business information'.

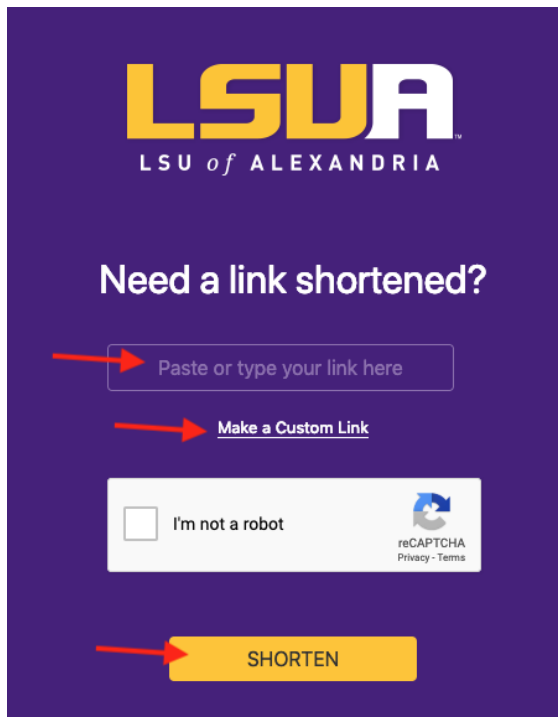
Top Action Bar: Features three buttons: 'Save and publish' (with an upward arrow), 'Unpublish' (with a downward arrow), and 'Embed' (with a code icon).

Main Content Area: Displays the 'Booking page status' as 'Published' with a green checkmark. A red arrow points from the 'Add logo' section to the 'Published' status. To the right of the status is a purple button labeled 'Open published page'. Below this is the 'Share your page' section, which includes a text input field containing the URL: `https://outlook.office365.com/owa/calendar/PeerMentor@lsua.edu/bookir`. Below the URL are icons for Facebook, Twitter, and Email, along with a purple 'Copy' button.

Below the sharing section are two other sections: 'Connect to Facebook' with a 'Connect' button, and 'Customer data usage consent' with a checkbox labeled 'Show a personal data collection and usage consent toggle along with a message on my booking page'.

16. To create a shortened link to your Bookings page, go to <http://lsua.it/> and paste in your Bookings link to create a Short URL.

Click “Make a Custom Link” to create an easy to remember URL.



The image shows a purple-themed web interface for creating shortened links. At the top, the LSU of Alexandria logo is displayed. Below the logo, the text "Need a link shortened?" is centered. There are three red arrows pointing to specific elements: the first points to a text input field labeled "Paste or type your link here"; the second points to the text "Make a Custom Link"; and the third points to a yellow button labeled "SHORTEN". Below the input field, there is a checkbox labeled "I'm not a robot" and a reCAPTCHA logo with the text "reCAPTCHA Privacy - Terms".

If you have any questions about setting up a Bookings page, submit a Helpdesk ticket to iethelp@lsua.edu.