How to Setup a Microsoft Bookings Site

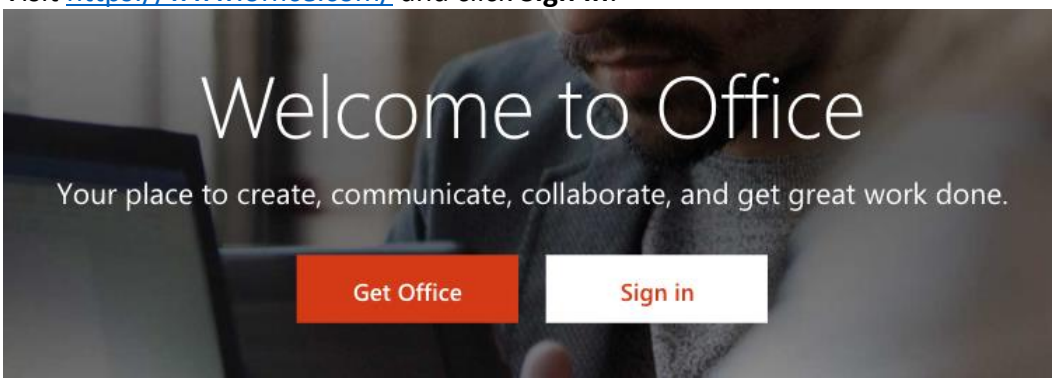
Introduction

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

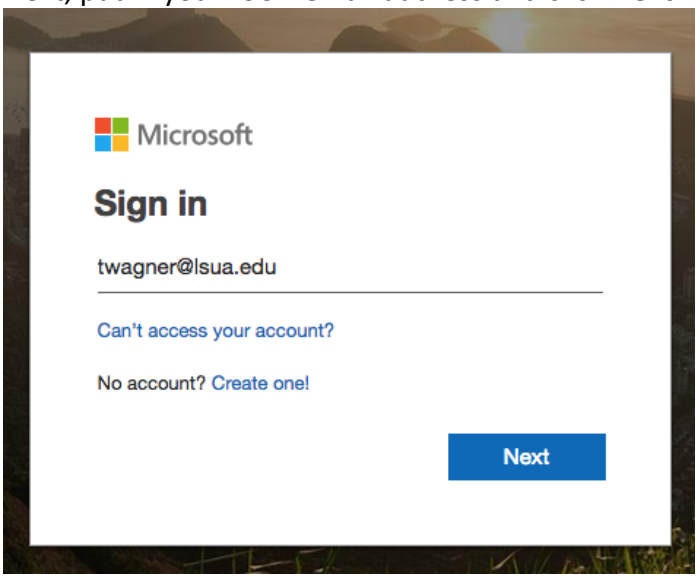
Within the Bookings' portal, you can manage your appointments, such as handling cancellations and rescheduling, sending appointment confirmations/reminders, all while automatically updating your Outlook calendar

Setup Microsoft Bookings for the First Time

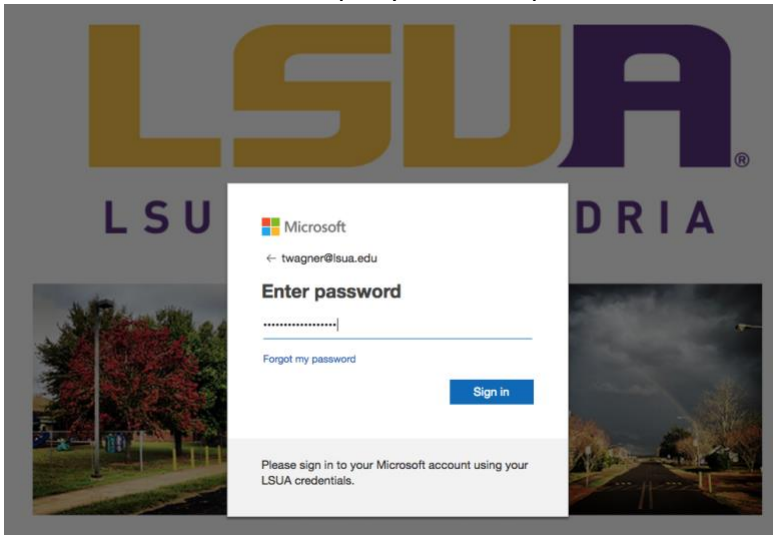
1. Visit https://www.office.com/ and click **Sign In**.



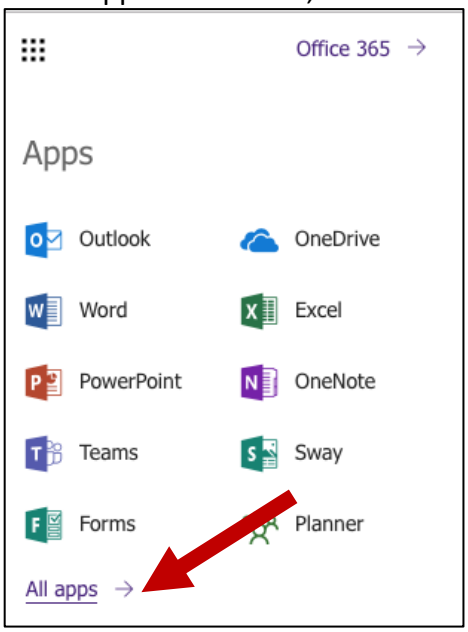
2. Next, put in your LSUA email address and click **Next**.



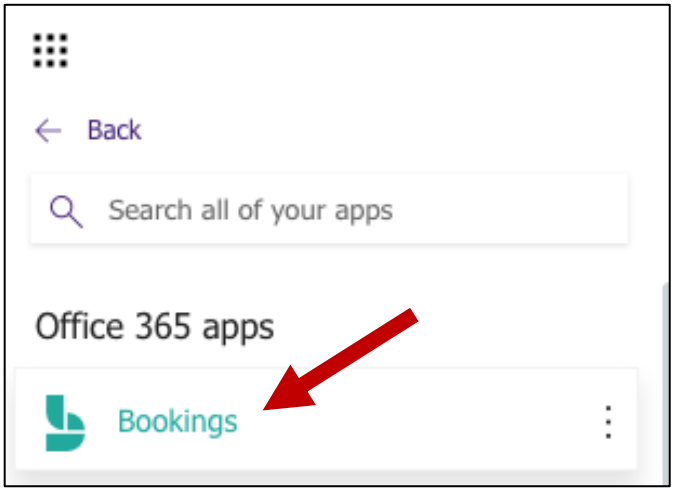
3. On the next screen, input your LSUA password and click **Sign In**.



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

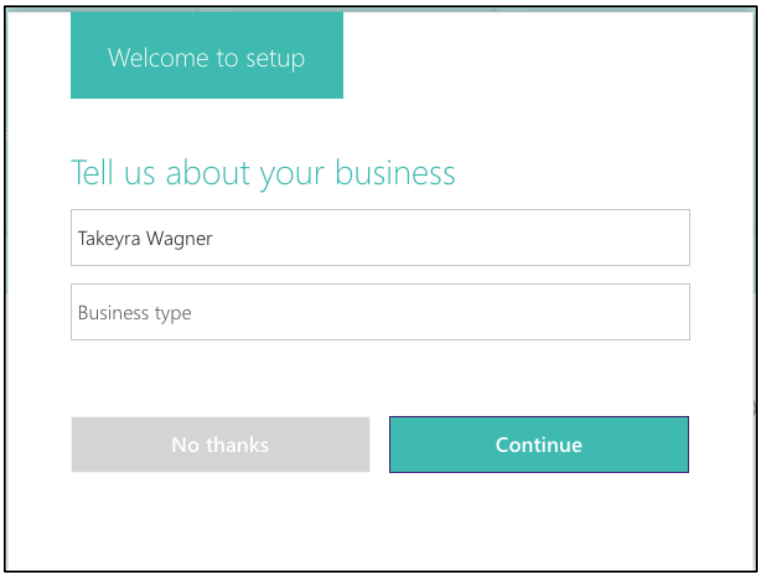


5. In the All apps menu, choose **Bookings**.

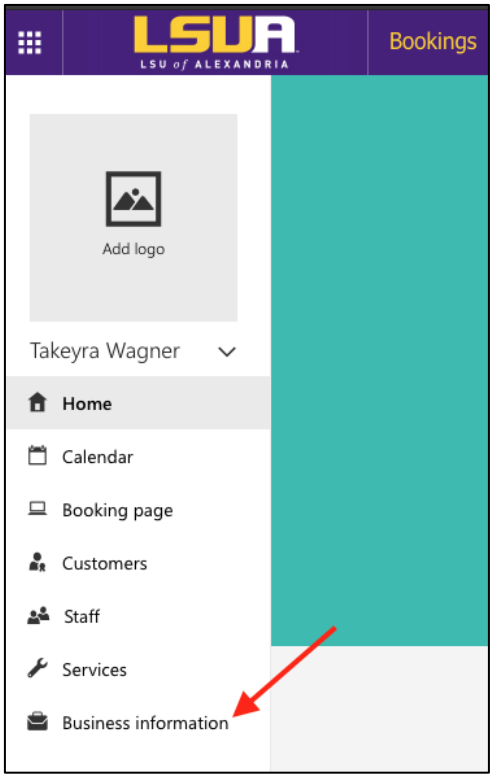


6. Microsoft Bookings will open. Click on the **Get it Now** button to begin.

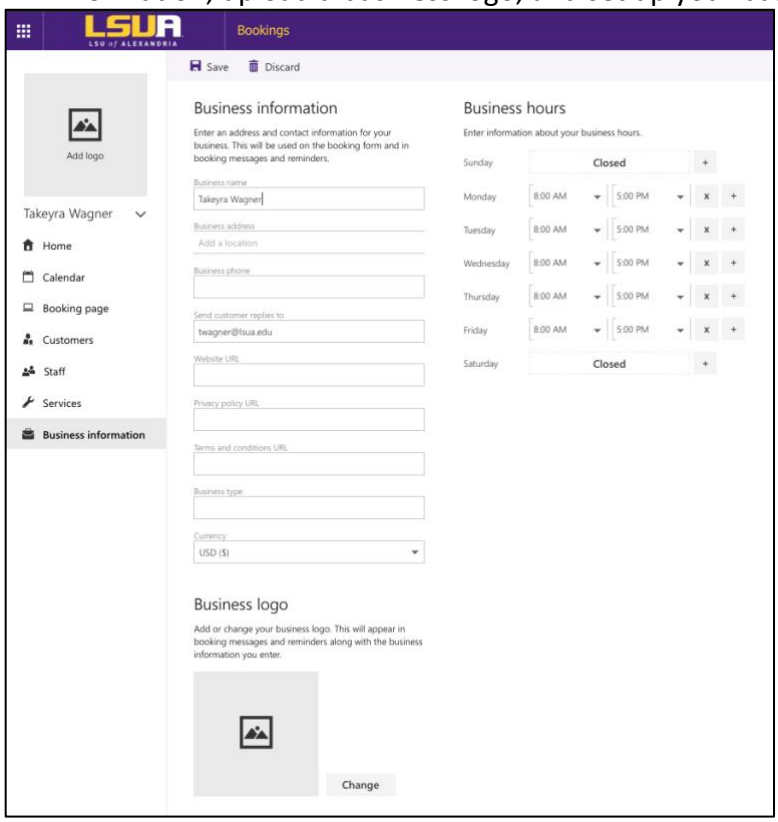
7. The next page will ask for two pieces of information: *Business name and Business type*. Put in your business name (or your First and Last Name). Business Type is not required. Click **Continue**.



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

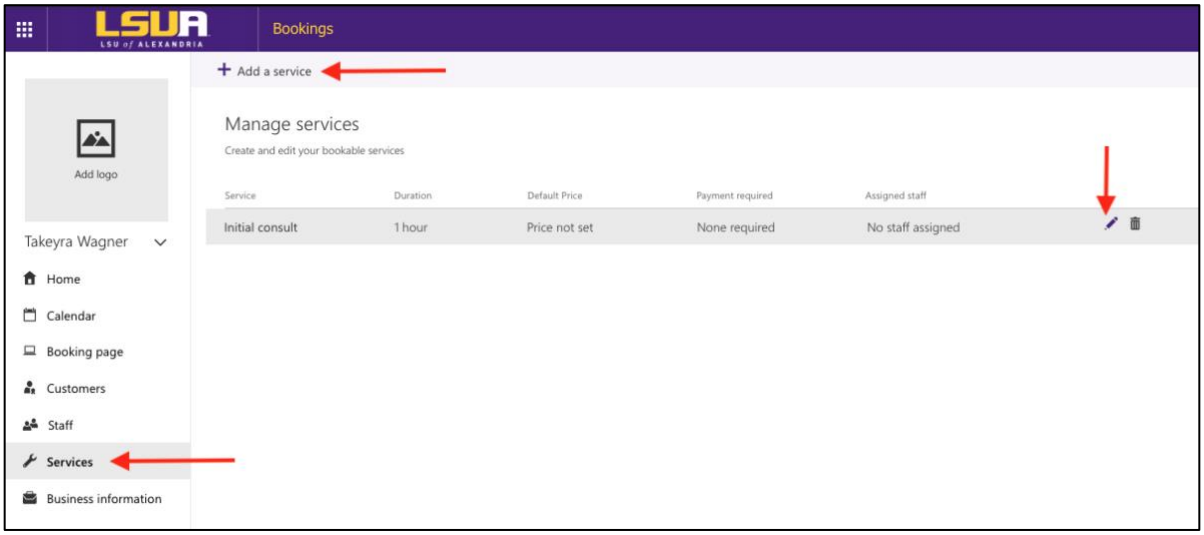


9. On the Business Information page, you can enter your business address, other contact information, upload a business logo, and set up your business hours.



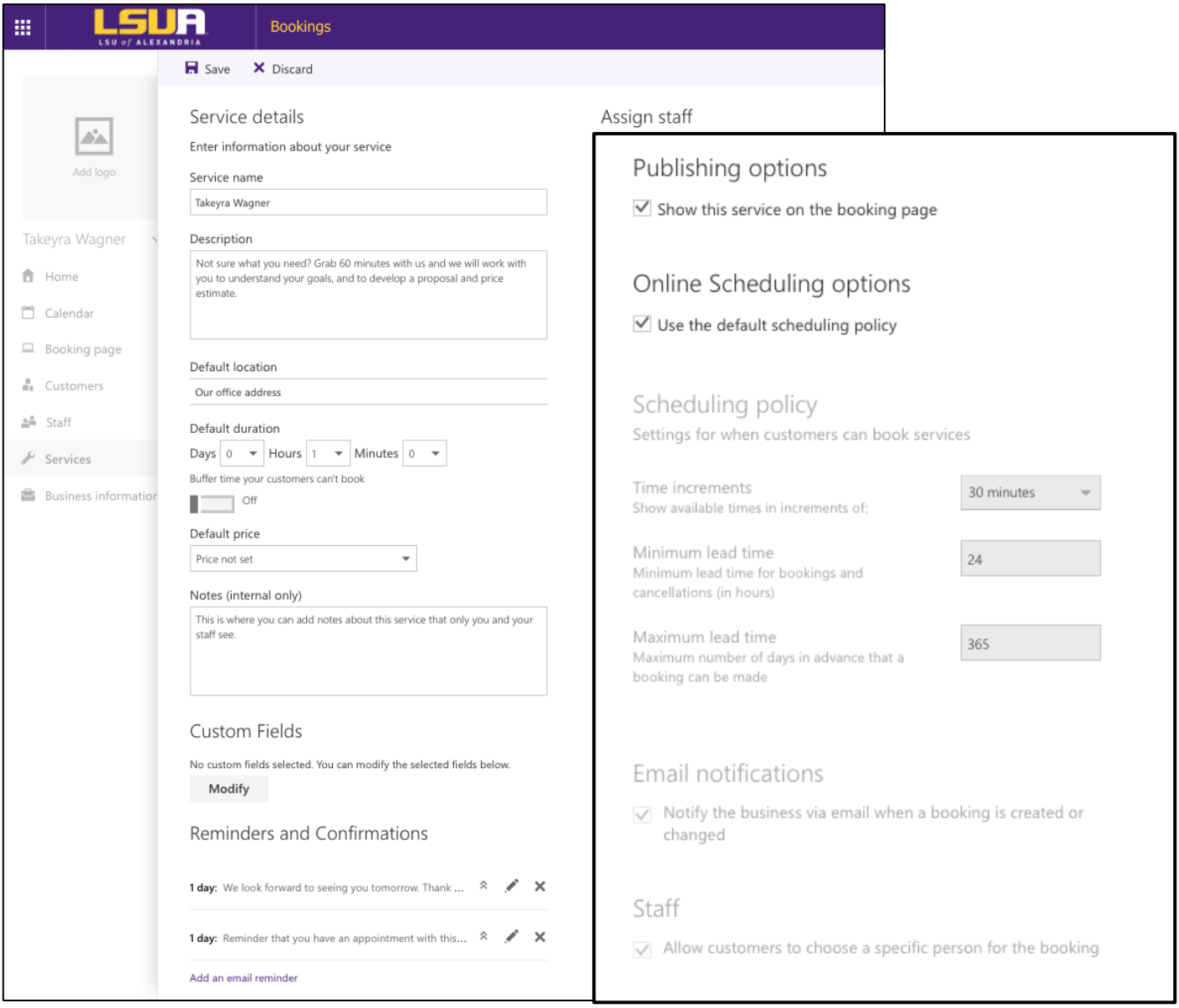
10. Next, set up your service offerings. Click **Services** from the left menu.

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.

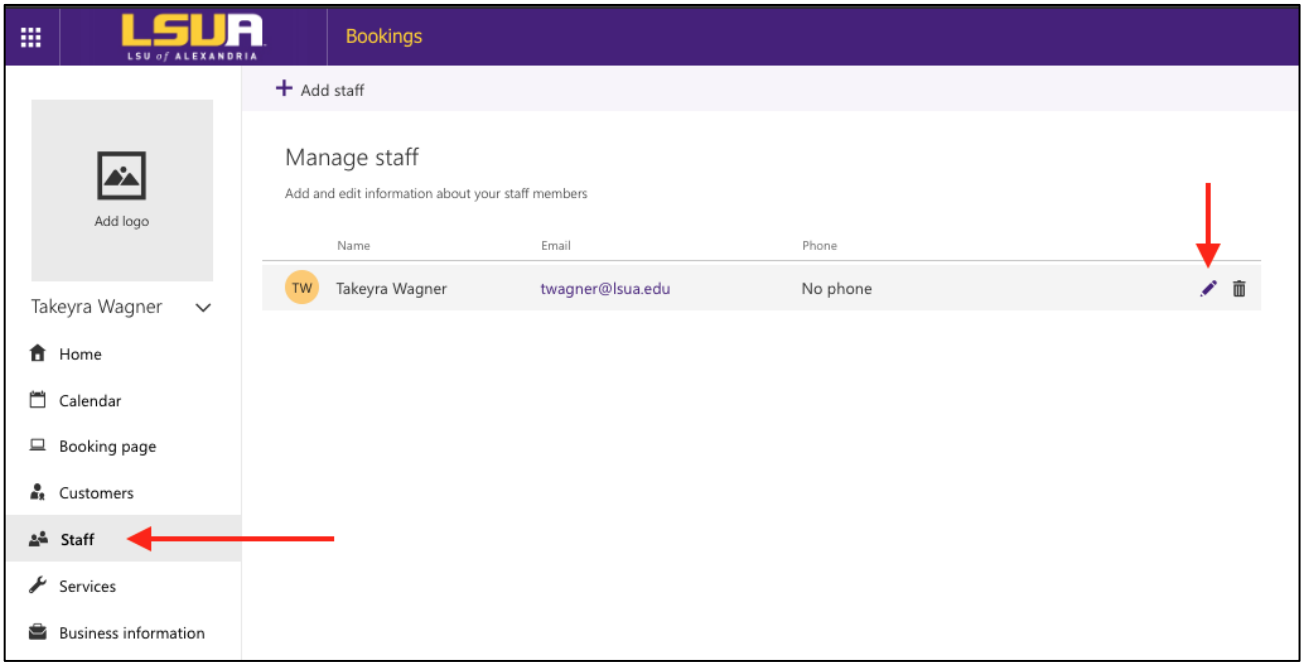


11. Once you're on the service-editing screen, enter your service details including name, description, and location. When you start typing an address in *Default location*, suggested locations will populate. Below are explanations for the other fields on the service-editing screen.

    - *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.
        i. You can choose to use the default scheduling policy by leaving the option checked, OR
        ii. 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.

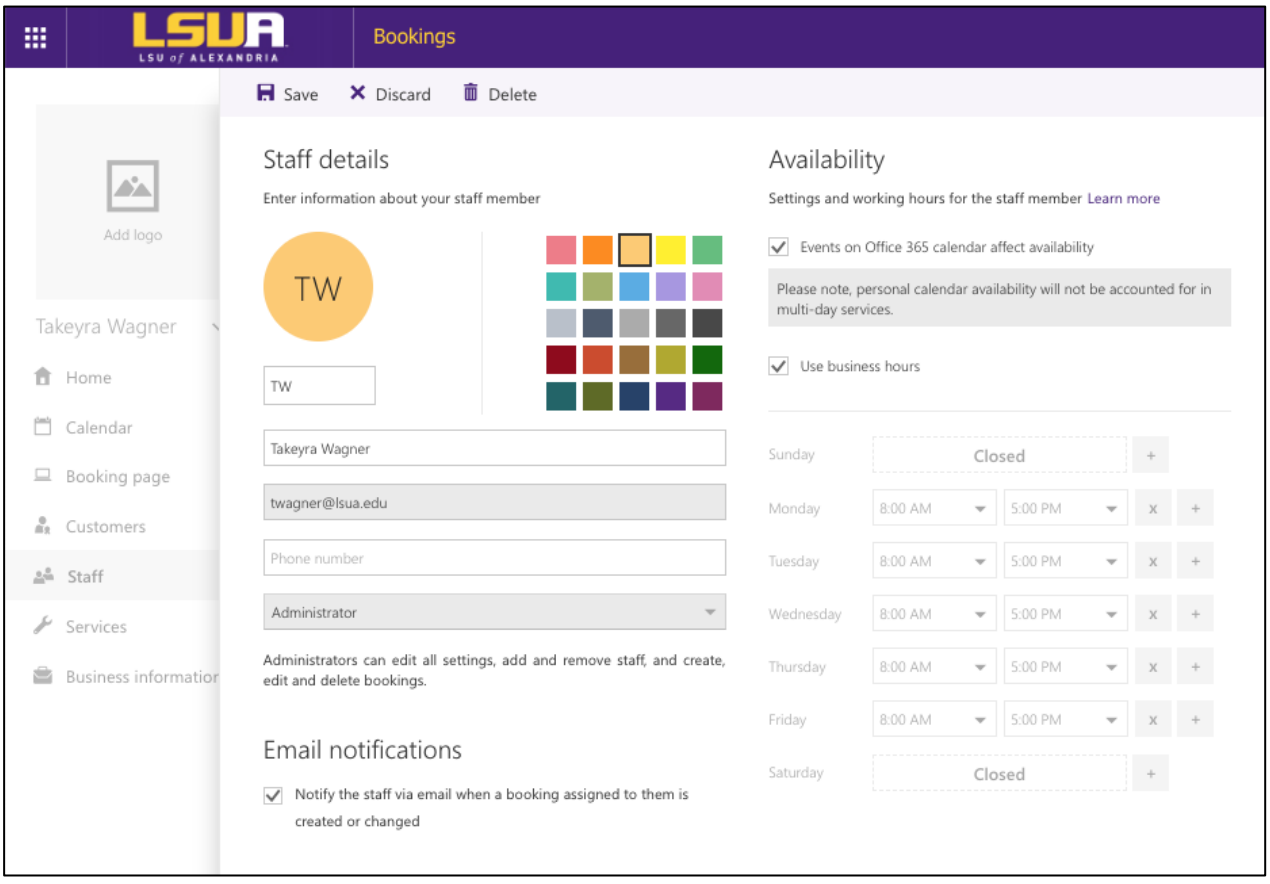


12. After adding and saving your service(s), click **Staff** from the left navigation pane. Click the pencil next to your name to edit your information.

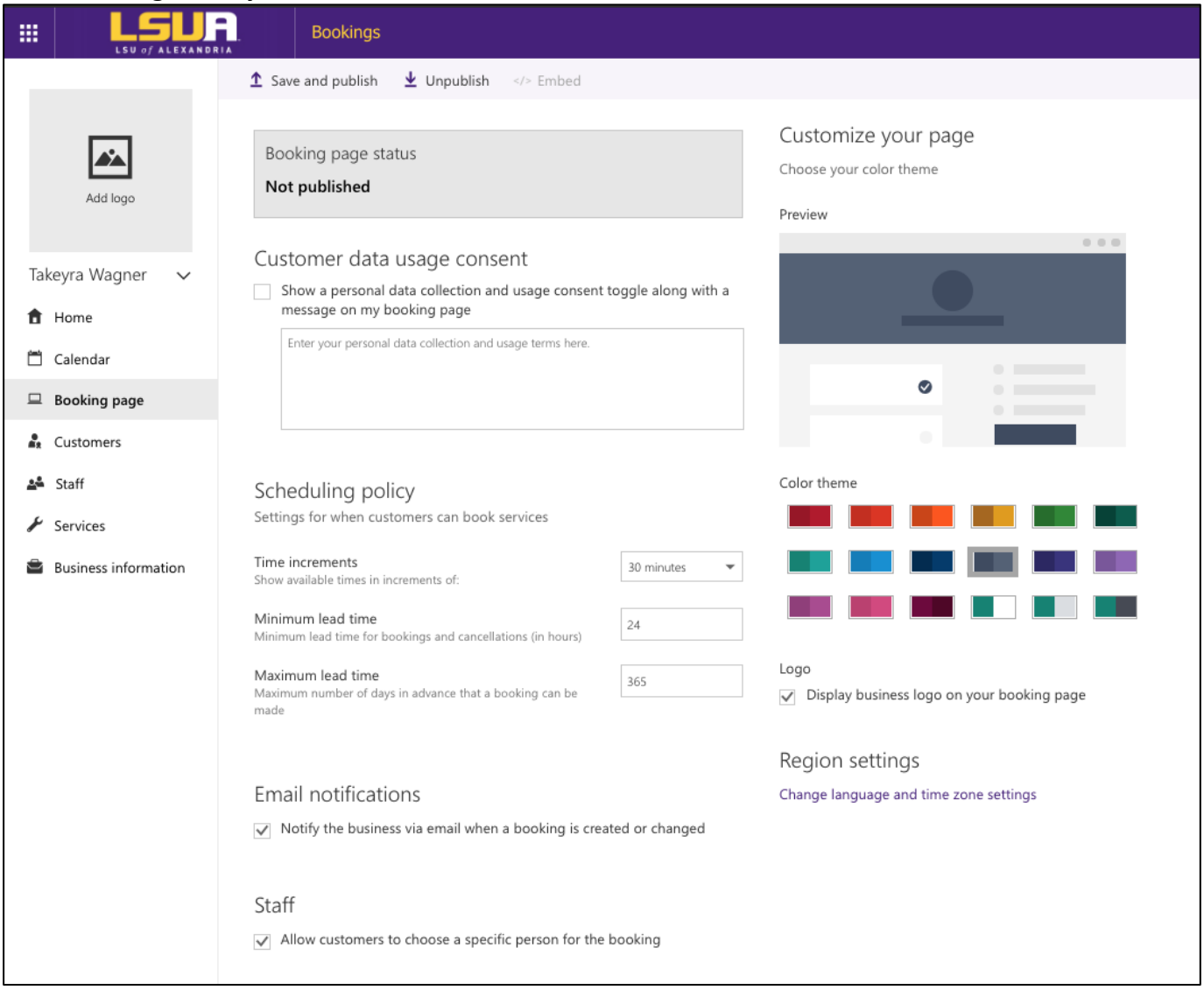


13. On this page, you can add information about you including your office number and whether to receive email notifications (we recommend to keep this option checked).

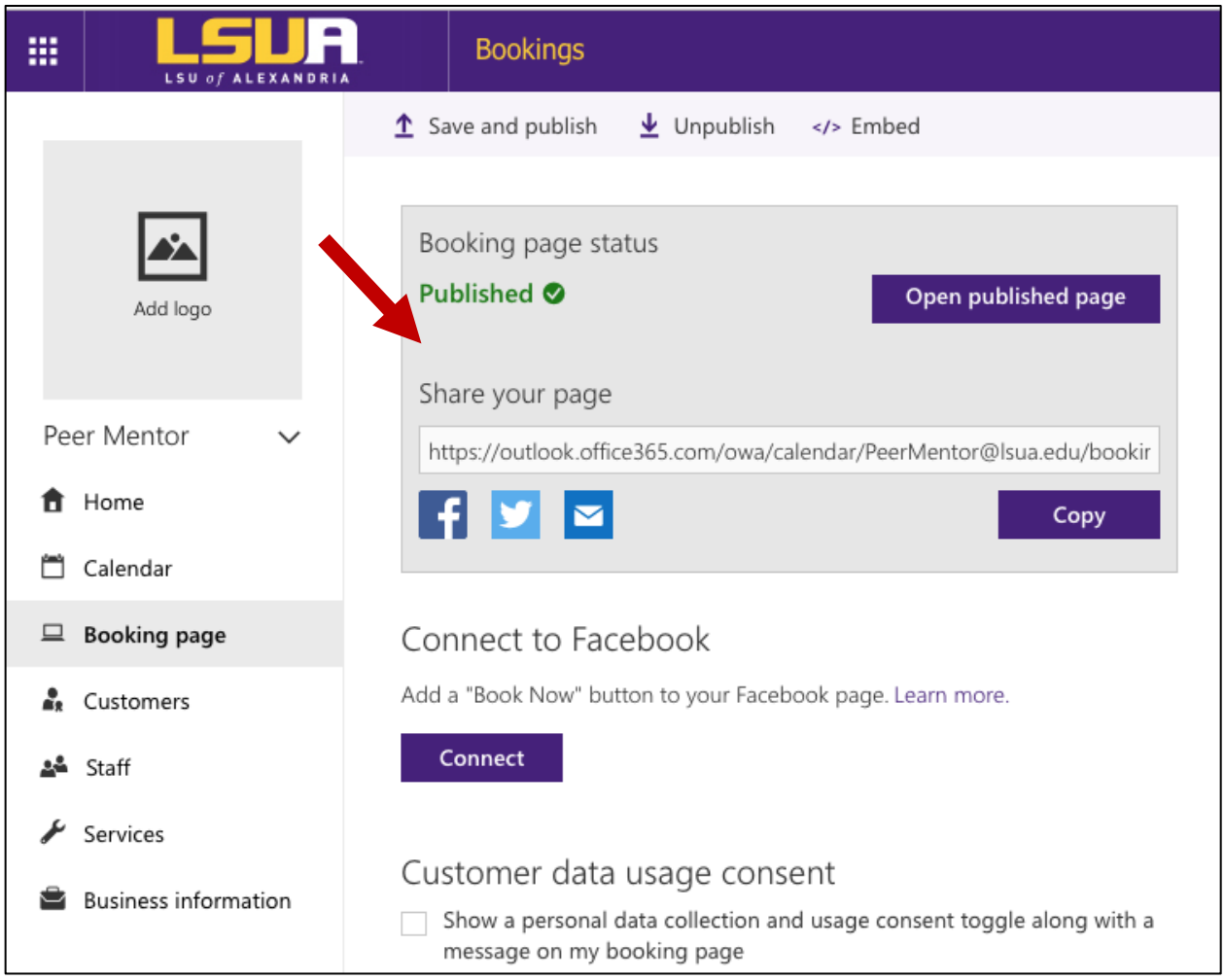
    By default, the system will set the availability to the business hours that were set in the Business Information section.



14. Next, select **Booking page** from the left navigation pane.
    a. *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**.
    b. *Customer data usage consent (optional):* Where you can customize a message for your visitors to consent to your site collecting their personal data.
    c. *Scheduling Policy:* Where you can set site-wide scheduling polices. We recommend the following settings:
        i. Minimum lead time: 24
        ii. Maximum lead time 30
    d. *Email Notifications:* Notifies you when an appointment is made.
    e. *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.
    f. *Customize your page:* Choose a color theme for your bookings page. We recommend the purple theme!
    g. ***Lastly, click Save and Publish!***

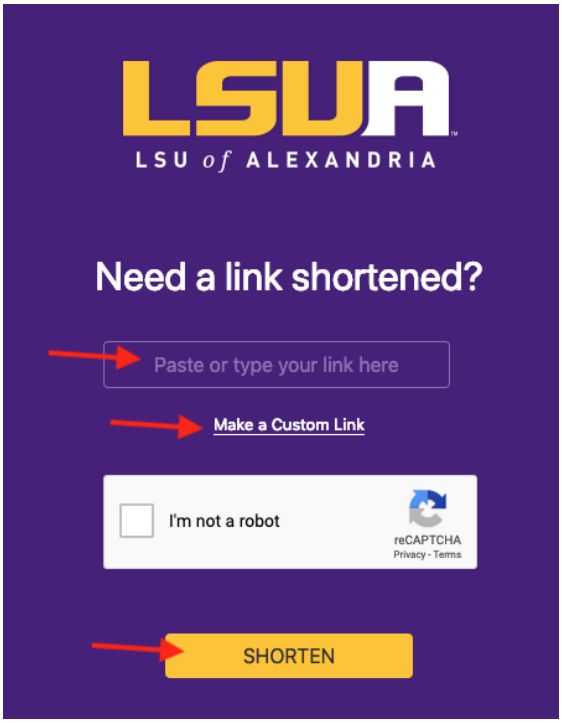


15. Once you click Save and publish, your Bookings site is now live. You can view your published page by clicking **Open published page** and share your page with others by copying the link.



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.



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