



This document will outline the process and suggested settings for creating an appointment sign-up for advisees during specified office hours and specific date range.

Create a service and customize your settings...

Save Discard

Service details

Enter information about your service

Service name
Advising Appointment

Description
Choose an available time to schedule and advising session with Dr. XYZ.

Default location
1 Zoom link or office number

2 Add online meeting ⓘ

Default Duration
Days 0 Hours 0 Minutes 25

3 Buffer time your customers can't book Off

4 Let customers manage their appointment when it was booked by you or your staff on their behalf.

Maximum number of attendees per event
Maximum Attendees 1

Default price
5 Price not set

In Bookings, open the **Services** tab and select “**Add a service**”.

Settings are up to you, the user. Below are some tips, suggestions, and clarification on some specific settings.

1. The default location you specify will appear in meeting invite and Outlook calendar event.
2. Selecting “Add online meeting” will schedule a video call in Microsoft Teams. *If you use Zoom, leave this unchecked and paste your Zoom link into Default Location.*
3. You may enter buffer time to enforce a time gap between appointments..
4. Allowing students to manage their appointments may reduce requests to reschedule.
5. Select “Price not set” to avoid any reference to fees.




Settings tips continued: Custom fields and notifications

Custom Fields

No custom fields selected. You can modify the selected fields below.

6


Reminders and Confirmations

7 **1 day**: Just a quick reminder that your ser...   

[Add an email reminder](#)

8

Additional Information for Email Confirmation



Add any additional information and links to send to people that book this service with you. They will see this content in the email confirmation they receive.

Publishing options

9 Show this service on the booking page

10 Online Scheduling options

Use the default scheduling policy

Scheduling policy

Settings for when customers can book services

Time increments

Minimum lead time
Minimum lead time for bookings and cancellations (in hours)

Maximum lead time
Maximum number of days in advance that a booking can be made

Email notifications

11 Notify the business via email when a booking is created or changed
 Send a meeting invite to the customer, in addition to the confirmation email.

6. To customize the information requested on your scheduling form, select Modify under Custom Fields.

7. Personalize the confirmation and reminder messages by clicking the edit (pencil) button.

8. In addition to reminders, you may opt for a custom email be sent to students who schedule an appointment.

9. Only UNCHECK this box if you wish to hide a service or make it unavailable.

10. **IMPORTANT:** Default schedule is established on the "Booking Page". If you are setting dedicated office / advising hours, **DESELECT** this setting to limit to your custom hours.

11. All Bookings will be added to your own Outlook calendar automatically and Bookings will prevent people from double-booking you on times already blocked off on your calendar. **Check this option if you would like your students to also receive an Outlook calendar invite.**



Settings tips continued: Ongoing schedule vs. custom dates

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:

Custom hours (recurring weekly) ▾

Monday	9:00 AM ▾	4:30 PM ▾	✕	+
Tuesday	9:00 AM ▾	4:30 PM ▾	✕	+
Wednesday	9:00 AM ▾	4:30 PM ▾	✕	+
Thursday	9:00 AM ▾	4:30 PM ▾	✕	+
Friday	9:00 AM ▾	4:30 PM ▾	✕	+
Saturday	Not bookable		+	
Sunday	Not bookable		+	

[+ Set different availability for a date range](#)

Ongoing schedule

If your office hours are ongoing, set your available hours as “recurring weekly” under the General Availability schedule.

General availability:

Not bookable ▾

Availability during these dates:

Start

End (inclusive)

Custom hours (recurring weekly) ▾ ⌵ 🗑️

Monday	9:00 AM ▾	4:30 PM ▾	✕	+
Tuesday	9:00 AM ▾	4:30 PM ▾	✕	+
Wednesday	9:00 AM ▾	4:30 PM ▾	✕	+
Thursday	9:00 AM ▾	4:30 PM ▾	✕	+
Friday	9:00 AM ▾	4:30 PM ▾	✕	+
Saturday	Not bookable		+	
Sunday	Not bookable		+	

[+ Set different availability for a date range](#)

Custom date range

If your office/advising hours will be offered for a specific date range, change General Availability to “Not bookable”.

Then select “Set different availability for a date range”. Enter the start and end dates followed by your Custom Hours (recurring weekly during specified dates).



Settings tips continued: Publish & Share your Bookings page

Save Discard

Once you have saved your new service, a sharing link will appear at the top of the page under Service Details. Copy this link to share it with your advisees.

Service details

Share your page for this service

Share a booking page URL specifically for this service

<https://outlook.office365.com/owa/calendar/Stephen.D...>

Share via Email

Copy

Note: Sharing the link from your Service page will provide an option for your students to schedule time for this service only (i.e. Advising). If you are offering multiple services from which your audience will choose, there is a different link on under the Bookings Page tab that will publish ALL available services.

This is an example of what your students will see on a “single service Bookings page for advising.

Only available times on specified days and times can be selected.

You will receive and email confirmation and a calendar invite when an appointment is made.

Dr XYZs Bookings Page

Advising
20 minutes

October 05

October 2020							9:00 am	9:30 am	10:00 am
Su	Mo	Tu	We	Th	Fr	Sa	10:30 am	11:00 am	11:30 am
					1	2	12:00 pm	12:30 pm	1:00 pm
4	5	6	7	8	9	10	1:30 pm	2:00 pm	2:30 pm
11	12	13	14	15	16	17	3:00 pm	3:30 pm	4:00 pm
18	19	20	21	22	23	24			
25	26	27	28	29	30	31			