

Microsoft 365: Scheduling Parent-Teacher Meetings with Bookings

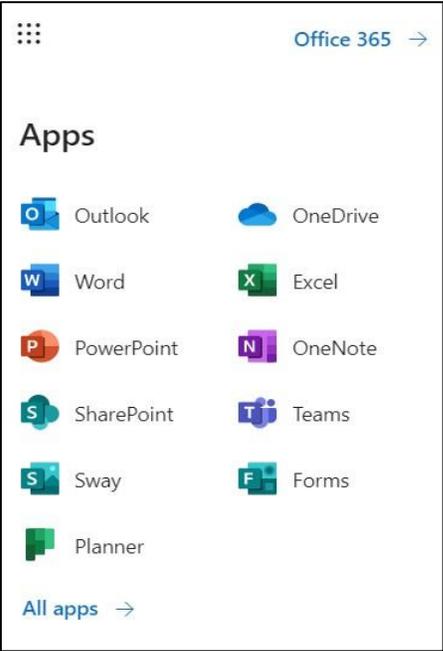


Bookings: Getting Started

- 1. Sign in to Office 365.
- 2. Click the waffle symbol beside the SD57 Staff Dashboard button.

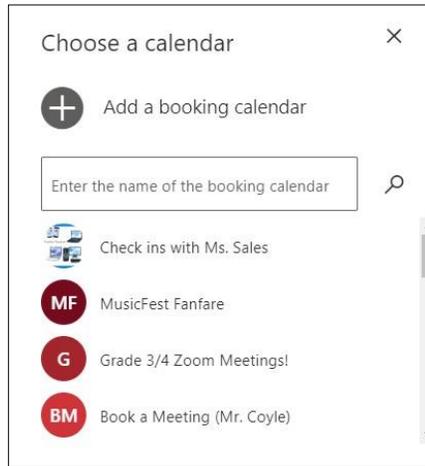


- 3. Click **All apps**.



- 4. Click **Bookings**. If you have already created a calendar in Bookings before, skip to step 10.
- 5. Click **Get it now**.

6. This is where you can open existing booking calendars or create new ones. Search by typing the name of the calendar you want to view and clicking the magnifying glass. You will only be able to view calendars that you have access to.



Note: Some calendars are listed below the search bar. This is a sampling, not a comprehensive list of all of SD57's booking calendars.

7. To create a new booking calendar: click **Add booking calendar**.
8. Type the name of your new booking calendar. Be as specific as you can.

Welcome to Bookings

Tell us about your business

Business name

Business type

No thanks Continue

- Click **Business Information** (left menu) to add a phone number and picture logo (if you wish). Leave the business hours as is. Your availability can be changed elsewhere

School District No. 57
Click Here for Staff Dashboard

Bookings

Save Discard

enter an address and contact information for your business. This will be used on the booking form and in booking messages and reminders.

enter information about your business hours.

Monday 8:00 AM 5:00 PM × +

Tuesday 8:00 AM 5:00 PM × +

Wednesday 8:00 AM 5:00 PM × +

Thursday 8:00 AM 5:00 PM × +

Friday 8:00 AM 5:00 PM × +

Saturday Closed +

Sunday Closed +

Business Information

Add Logo

Trial

Home

Calendar

Booking Page

Customers

Staff

Services

Business Information

Business name
Exclusive dream interpretation

Business address
Add a location or a room

Business phone

Send customer replies to
test2@sd57.bc.ca

Website URL

Privacy policy URL

Terms and conditions URL

Business type
Business type

Currency
USD (\$)

Business logo

Add or change your business logo. This will appear in booking messages and reminders along with the business information you enter.

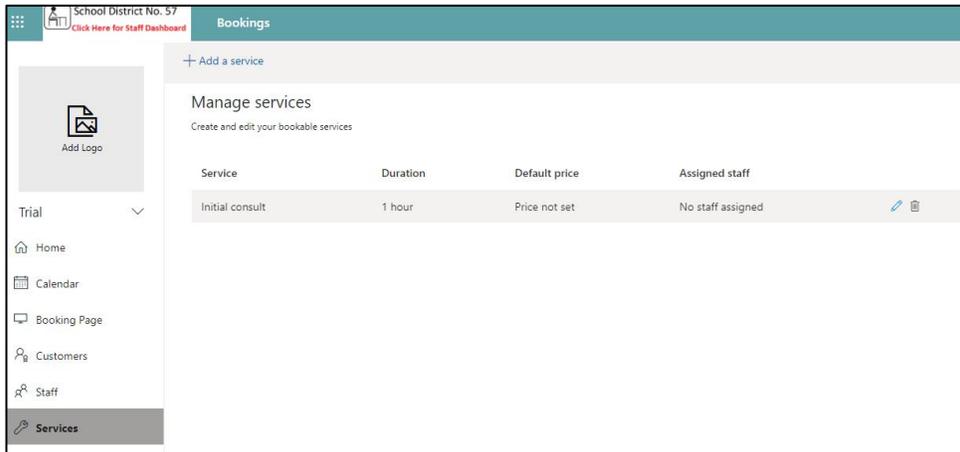
Add Logo

Change



Bookings: Setting Up Service for Parent-Teacher Meetings

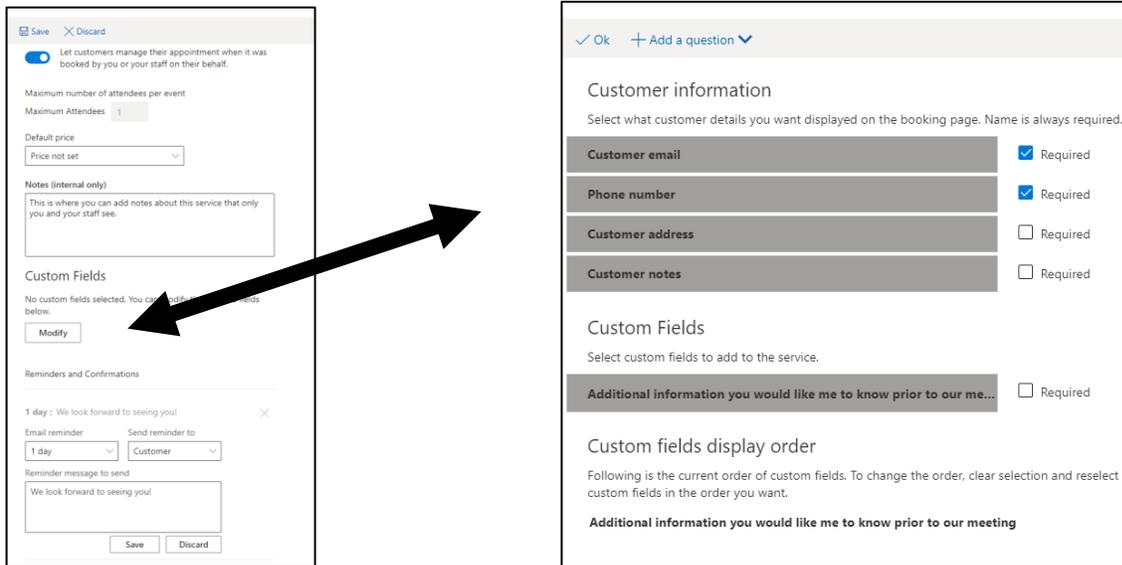
10. Click **Services** to set the type of bookings and add more information.



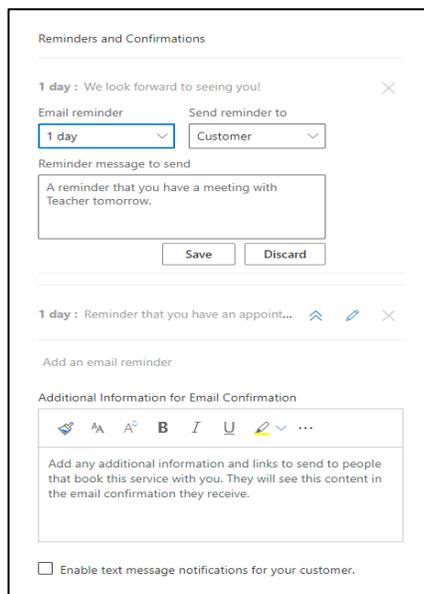
11. Click the pencil beside the service to edit the details, or click + **Add a service**.

12. Click the staff you want to assign (you).
13. Enter your **Service name** and **description** of what the booking is for.

14. If this will be a TEAMS meeting, move the toggle **Add online meeting**.
15. Enter the duration of the service (meeting)
16. Move toggle if you want guardians to be able to edit a booking you have made.
17. Click **Modify Custom Fields**.



18. Click the information that you would like the guardians to supply when booking a time. You can add a custom question if you wish. Click **Ok**.
19. You can set **Reminders and Confirmations** to your guardians and to yourself, if you wish.



You can delete reminders here also by clicking the X, or Add an email reminder for more frequent reminders.

20. Click **Publishing options**, deselect **Use the default scheduling policy** (so you can set a new one).

21. Set **Time increments, minimum and maximum lead time**.

22. Enable **Email notifications** if you want to be emailed when someone books, and if you want a guardian to receive an invite (includes TEAMS link)

Enable text message notifications for your customer.

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: 15 minutes

Minimum lead time
Minimum lead time for bookings and cancellations (in hours): 0

Maximum lead time
Maximum number of days in advance that a booking can be made: 24

Email notifications

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.

23. Set **General Availability** to **Not bookable**. (This is important otherwise people will be able to book 5 days a week from 8:00-5:00)

24. Set **Availability during these dates**: Dates of the parent-teacher meetings

25. Select **Bookable when staff are free** from the drop-down list.

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:

Not bookable

Availability during these dates:

Start: 11/22/2021 End (inclusive): 11/26/2021

Bookable when staff are free

+ Set different availability for a date range

Click **Save**.



Bookings: Customize Staff Time for Parent-Teacher Meetings

26. Click **Staff** (left menu) to customize your availability and settings.
27. Uncheck **Use business hours**.
28. Customize your availability hours. You can add blocks of time for each day by clicking +. If you want to delete a block, click X.

The screenshot shows the 'Bookings' interface for a staff member. The top navigation bar includes 'School District No. 57' and 'Bookings'. The left sidebar contains a menu with options: Home, Calendar, Booking Page, Customers, Staff (highlighted), Services, and Business Information. The main content area is divided into three sections: 'Staff details', 'Availability', and 'Email notifications'. The 'Staff details' section includes a profile picture placeholder, a name field containing 'TT', and a membership information box with status 'Bookable' and last changed date 'Mon 11/8/2021 8:44 AM'. The 'Availability' section has a checkbox for 'Events on Office calendar affect availability' (checked) and a checkbox for 'Use business hours' (unchecked). Below this is a table showing availability for each day of the week, with time slots and 'X'/'+' buttons for editing. The 'Email notifications' section has a checkbox for 'Notify the staff via email when a booking assigned to them is created or changed' (checked).

Day	Block 1	Block 2	Action
Monday	7:45 AM	8:30 AM	X
	3:00 PM	5:00 PM	X +
Tuesday	8:00 AM	5:00 PM	X +
Wednesday	8:00 AM	5:00 PM	X +
Thursday	8:00 AM	5:00 PM	X +
Friday	Day off		+
Saturday	Day off		+
Sunday	Day off		+

29. Customize your profile if you wish.
30. Click **Save**.



Bookings: Publish Booking Page and Send Out Emails for Parent-Teacher Meetings

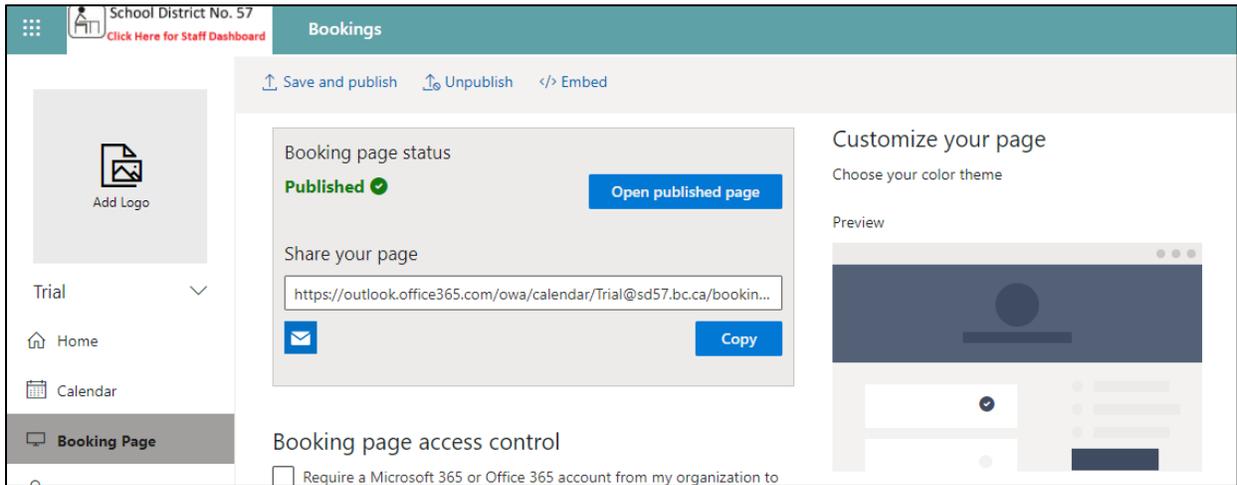
31. Click **Booking Page** (left menu) to set up your booking page.

32. Set your **Scheduling policy** the same as you did on the Services page.

33. **Customize** your page with colour scheme and if you want your logo to show.

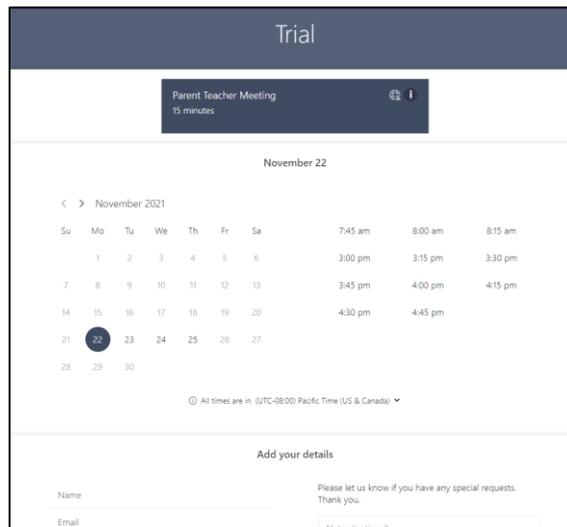
34. Set **Availability** the same as you did on the Services page.

35. Click **Save and publish**.



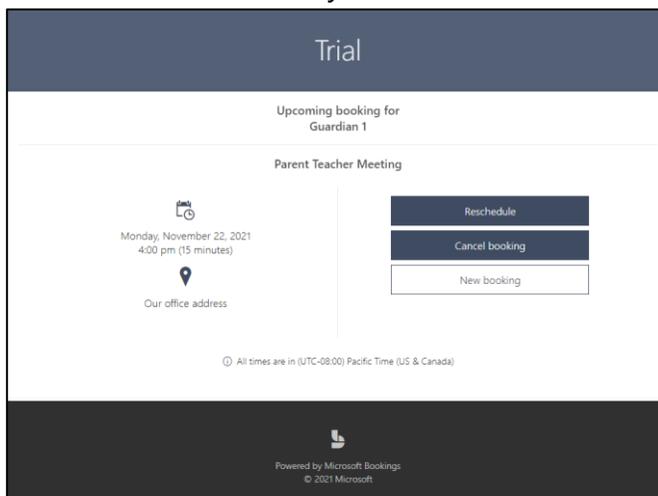
36. Click **Copy**. Now you can share the link with guardians in an email.

37. Click **Open published page** to view your booking page that guardians will see.

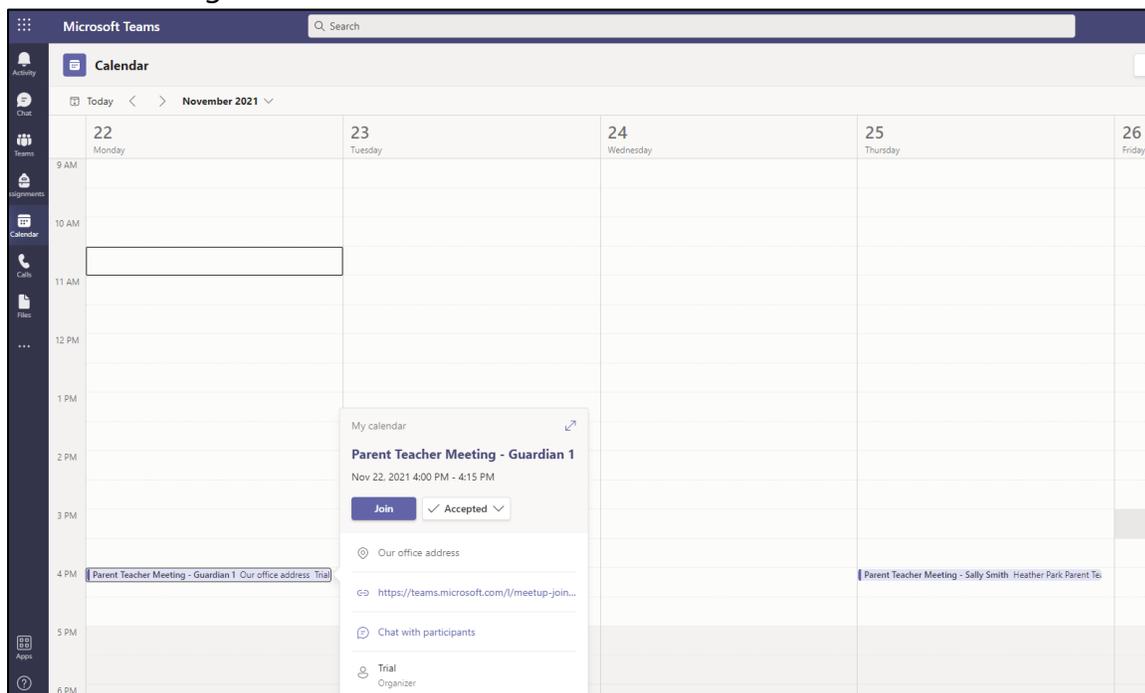


38. When a guardian books an appointment, it will automatically populate into your calendar (Outlook, Teams, and Bookings all have connected calendars). You can view appointments made in your calendar. Each appointment generates a new TEAMS meeting (if that setting is turned on in step 14)

39. Your guardians will see this when they book.



40. To begin a meeting, go to your calendar in **Outlook, TEAMS, or Bookings**. Click on the meeting. Click **Join**.



For more step-by-step guides for Office 365, please go to:
<https://www.sd57curriculumhub.com/office-365>