# 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. <u>To create a new booking calendar</u>: 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 busir	ness
Business name	
Business type	
No thanks	Continue

9. 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	Bookings					
Click Here for Staff Dashboard	g-					
	Save Discard Enter an address and contact information for your business. This will be used on the booking form and in	Enter informat	ion about your pusiness nours.			
	booking messages and reminders.	Monday	8:00 AM V 5:00 PM	4 ~	×	+
	Business name	Tuesday	8:00 AM V 5:00 PM	∧ ∧	×	+
Add Logo	Exclusive dream interpretation	Wednesday			×	+
	Add a location or a room	weatesday			~	
Trial 🗸	Business phone	Thursday	8:00 AM V 5:00 PM	1 ~	×	+
က် Home		Friday	8:00 AM V 5:00 PM	4 ~	×	+
🗐 Calendar	Send customer replies to	Saturday	Closed		+	
	test2@s07.bc.ca	Cure de u	Closed			
Booking Page		Sunday	Closed		Ŧ	
$P_{\mathbf{B}}$ Customers	Privacy policy URL					
g <sup>Q</sup> Staff	Terms and conditions URL					
Services     Services						
- <b>A</b> -	Business type					
Business Information	Business type					
	Currency					
	USD (\$) V					
	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					



## Bookings: Setting Up Service for Parent-Teacher Meetings

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

School District No. 5	67 Bookings				
	+ Add a service				
Add Logo	Manage services Create and edit your bookable se	ervices			
	Service	Duration	Default price	Assigned staff	
Trial $\checkmark$	Initial consult	1 hour	Price not set	No staff assigned	08
🔂 Home					
Calendar					
🖵 Booking Page					
$P_{\rm B}$ Customers					
g <sup>R</sup> Staff					
Bervices					

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

Service details	Assign Staff
Share your page for this service Publish your booking page to enable sharing options for this service	TT Test2 Test2
Share via Email Copy	
Enter information about your service	
Service name	
Parent leacher Meeting	
Description	
15 minute appointment to discuss student progress.	
Default location	
Our office address X	
Add online meeting ①	
Default Duration	
Days 0 V Hours 0 V Minutes 15 V	

- 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.

any i inclook loiwa	rd to seeing you! X
mail reminder	Send reminder to
1 day $\sim$	Customer 🗸
Reminder message to s	send
Teacher tomorrow.	are a meeting war
	Save Discard
I day : Reminder that	you have an appoint 😤 🧷 🗡
L day : Reminder that Add an email reminde	you have an appoint
I day : Reminder that Add an email reminde Additional Information	you have an appoint $\land$ $\checkmark$ $\checkmark$ for Email Confirmation $I  \bigcup  \swarrow  \checkmark$

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 you	ir customer.
Publishing options	
Online Scheduling options	
Use the default scheduling policy	
Scheduling policy	
Settings for when customers can book servic	es
Time increments Show available times in increments of:	15 minutes V
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	
<ul> <li>Notify the business via email when a boo changed</li> <li>Send a meeting invite to the customer, in confirmation email.</li> </ul>	king is created or addition to the

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.

n general, a service can be booked when its staff are free. If you vish to customize this further, you can do so below.				
General availabili	ty:			
Not bookable	$\sim$			
<b>Availability durin</b> Start	g these dates: End (inclusive)			
Availability durin Start 11/22/2021	g these dates: End (inclusive)			

#### 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.

School District No. 57	ard Bookings			
	🔚 Save 🗙 Discard 📋 Delete			
	Staff details	Availabi	lity	
	Enter information about your staff member	Settings and n	neeting hours for the staff member Learn more	
Add Logo	Membership information	Events or	n Office calendar affect availability	
	Status: Bookable	Please note, in multi-day	personal calendar availability will not be accounted for rervices.	
Trial 🗸 🗸	Email last sent: Mon 11/8/2021 8:44 AM   Re-send	Use busi	ness hours	
☆ Home				
Calendar		Monday	7:45 AM V 8:30 AM V X	
🖵 Booking Page			3:00 PM ~ 5:00 PM ~ +	
Pg Customers	π	Tuesday	8:00 AM $\checkmark$ 5:00 PM $\checkmark$ +	
يم <sup>R</sup> Staff	Test? Test?	Wednesday	8:00 AM $\checkmark$ 5:00 PM $\checkmark$ +	
Bervices		Thursday	8:00 AM $\checkmark$ 5:00 PM $\checkmark$ +	
( <sup>C</sup> ) Dusinger lafe mention	test2@sd57.bc.ca	Friday	Day off +	
	Phone number	Saturday	Day off +	
	Administrator $\checkmark$	Sunday	Dav off +	
	Administrators can edit all settings, add and remove staff, and create, edit and delete bookings.			
	Email notifications			
	Notify the staff via email when a booking assigned to them is created or changed			

- 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.

School District No. 57	ard Bookings	
	$\hat{T}$ Save and publish $\hat{T}_{\Theta}$ Unpublish $4/2$ Embed	
Add Logo	Booking page status Not published	Customize your page Choose your color theme Preview
Trial     ✓ <sup>Ω</sup> Home <sup>□</sup> Calendar <sup>Q</sup> Booking Page <sup>Q</sup> Customers <sup>Q</sup> Staff <sup>D</sup> Services <sup>D</sup> Business Information	Booking page access control	Preview
	Show available times in increments of:     15 minutes       Minimum lead time Minimum lead time for bookings and cancellations (in hour)     0       Maximum lead time Maximum number of days in advance that a booking can be made     24	Region and time zone settings Change language and time zone settings Always show time slots in business time zone

- 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.

Allow customers	to choose a specific person for the booking
Availability	
In general, a service o customize this furthe	an be booked when its staff are free. If you wish to r, you can do so below.
General availability:	
Not bookable	$\checkmark$
Availability during t	these dates:
Start	End (inclusive)
11/22/2021	11/26/2021
Bookable when stat	f are free $\sim$ 🛍

#### 35. Click Save and publish.

School District No. 5 Click Here for Staff Dashb	57 <sub>Bookings</sub>	
	$\uparrow$ Save and publish $\uparrow_0$ Unpublish $\checkmark$ Embed	
Add Logo	Booking page status Published  Open published page	Customize your page Choose your color theme Preview
Trial ~	Share your page          https://outlook.office365.com/owa/calendar/Trial@sd57.bc.ca/bookin         Copy	
Calendar	Booking page access control Require a Microsoft 365 or Office 365 account from my organization to	

- 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.

						Tr	rial		
			P 1	arent T 5 minute	eacher :s	Meeting	(	80	
						Nove	mber 22		
<	> Nov	ember	2021						
Su	Mo	Tu	We	Th	Fr	Sa	7:45 am	8:00 am	8:15 am
	1	2	3	4	5	6	3:00 pm	3:15 pm	3:30 pm
7	8	9	10	11	12	13	3:45 pm	4:00 pm	4:15 pm
14	15	16		18	19	20	4:30 pm	4:45 pm	
	22	23	24	25	26				
28	29	30							
				() A	l times an	e in (UTC-08:0	0) Pacific Time (US & Canada)	*	
						Add yo	ur details		
Nar	ne						Please let us know Thank you.	if you have any sp	ecial requests.
Ema	ail						Noter (optional)		

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**.

	Mic	crosoft Teams Q Se	arch			
 Activity		Calendar				
E		🗊 Today $\langle$ $>$ November 2021 $\vee$				
tii) Teams		22 Monday	23 Tuesday	24 Wednesday	25 Thursday	26 Friday
ssignments	9 AM					
ET Calendar	10 AM					
Calls	11 AM					
Files						
	12 PM					
	1 PM					
	2 PM		My calendar 2			
	3 PM		Join 🗸 Accepted 🗸			
	4 PM	Parent Teacher Meeting - Guardian 1 Our office address Trial	Our office address	( Pare	Parent Teacher Meeting - Sally Smith Heather Park Parent Tei	
			CO https://teams.microsoft.com/l/meetup-join			
EE Apps	5 PM		Chat with participants			
?	6 PM		Organizer			

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