




Microsoft Bookings - Quick Reference Guide

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Additional Resources

- Service-Now KB Article ID: [KB0013416](#)
- Microsoft Documentation: [MS Bookings Resources](#)
- Checklist/Questionnaire: [Getting Started Checklist/Questionnaire](#)
- MS Teams Site Bookings Channel: [Bookings Training SPOT](#)
- Princeton’s Bookings Website: [bookings.princeton.edu](#)
- 1-1 Bookings Support: [Book time with Bookings specialist](#)

 **Note:** All the resources listed above can be found within the Princeton Bookings website: [bookings.princeton.edu](#).

Quick Function Lookup


Once the Bookings calendar has been setup, it may need to be updated/changed based on changes to availability. Use the table below to quickly navigate to actions you may take to manage your calendar.

Quick Function	Page
Update Office Hours	3
Unpublish Calendar	4
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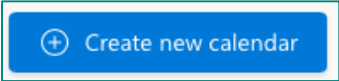
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Step 1 - Create a New Bookings Calendar – Setup Wizard


1. Navigate to [Princeton’s Microsoft Portal](https://portal.office.com) (portal.office.com) and login in with your Princeton NETID and Password.
2. From the App Launcher, locate and select Bookings.


 **Note:** The first time you use Bookings, you’ll be asked to click **Get it Now** to get started.

3. From the Bookings Landing Page, click **Create New Calendar**



A Wizard will launch, walking you through steps to create a new Calendar. Only the first step is required. We recommend skipping to Step 4 by clicking **Next** on the bottom-right of the Wizard window.

 **Note:** Completion of the wizard **will not** result in a finalized calendar.




Naming Convention
(Strongly recommended)

Preface your Business Name with the prefix "Bookings - "

Example: Bookings - McNeil-OfficeHours

Wizard Step 1 of 4 – Create a New Bookings Calendar

Name: This is a required field. The information entered here is used to create a Bookings Mailbox and a unique public-facing Booking Page for appointment management. Only the Name field is required. This URL cannot be changed once created.

 **Note:** While the URL cannot be changed, the Business Name (as seen by the end-user on the Bookings Page) can be modified. See Business Information section of this guide (Step 2).

The following other fields in this step can be skipped and added later.

- Add a Logo
- Business Type
- Business Hours

Step 1 of 4

Create a new Bookings calendar

The business name you enter here will be used to create the email address for sending booking invites (e.g., businessname@domain.com) and the booking page link (e.g., https://book.ms/b/businessname@domain.com).

Name *

Give your calendar a name

[+ Add a logo](#)

Business type

Choose a business type


Business hours ⓘ

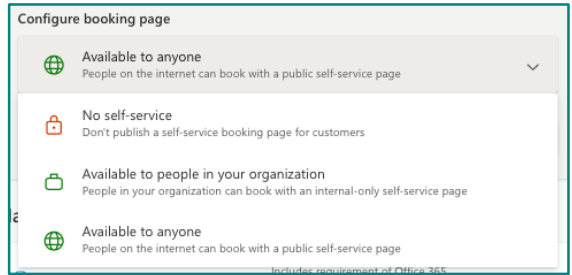
Mon-Fri, 8:00 AM - 5:00 PM

[Change](#)

Wizard Step 4 of 4 (Optional) – Choose who can Book Appointments

This step allows you to set permissions for whom should be able to access the Bookings Page and book appointments with you.

 **Note:** This option can be modified in the future. See Booking Page section of this guide (Step 3).



Your Calendar is created and ready for custom configuration. It contains left-navigation menu items for which we recommend a specific order:

Recommended Order of Steps

1. Create a Bookings Calendar - Wizard (Step 1)
2. Enter Business Information
3. Customize the Booking Page*
4. Add Staff
5. Define Services
6. Schedule Closures and Time Off

***Booking Page** – The default scheduling configuration is setup here. Additional modifications to the schedule can be made in the Services section.

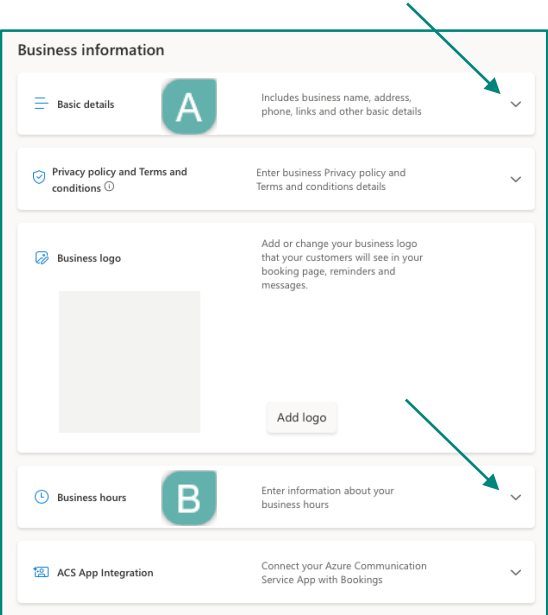
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Step 2: Enter Business Information

Click **Business Information** from the left-navigation pane. The information entered here will be visible on the public-facing Bookings Page to anyone seeking to book time with you.

Enter Business Information

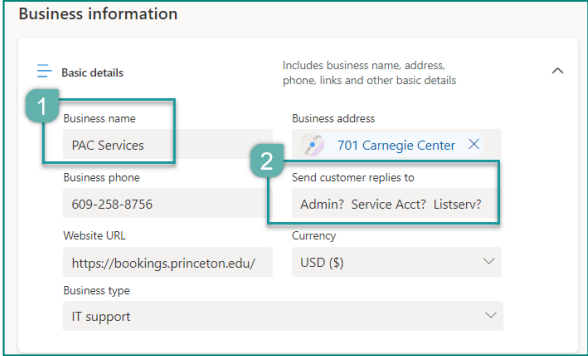
The Business Information tab lists five sections that help you set up your Calendar. It is recommended that you review the fields in two essential areas: **Basic Details** and **Business Hours**.



Pull down the caret in each section to reveal the fields in each section.

A Basic Details

The information entered in this section provides users with at-a-glance information you wish to share on the Booking Page such as office location, phone number, and website URL. There are two main components of the **Basic Details** section to be aware of:



1 Business Name

By default, Bookings pre-populates the **Business Name** field with the name you gave your Calendar. This information is displayed as a heading/calendar title on the public-facing Booking Page and can be modified.

Note: Changes to the **Business Name** field will only be reflected at the top of your published Booking Page. Your calendar cannot be renamed on the backend.

2 Send Customer Replies To

The email address entered here will receive notifications regarding activity on the Calendar. This could be the Administrator (owner) of the Calendar, a listserv, a Service Account, etc.

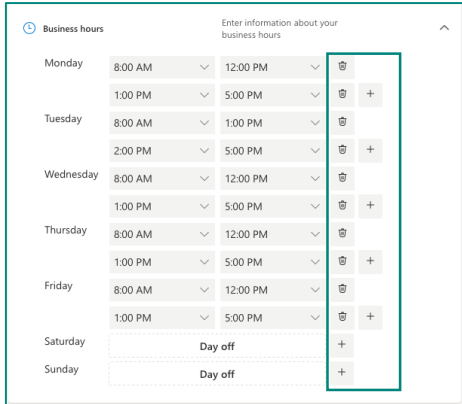
Note: At this time, this field cannot exceed one email address.

B Business Hours

The **Business Hours** are intended to indicate all hours of operation. These are the windows in which you or those you support are accepting appointments and are generally expected to be working. The approach you take to these fields are contingent on how you intend to use Bookings:

- **Single User:** If you are only scheduling one type of appointment for yourself only, you can define your Business Hours as the hours you want to accept appointments.
- **Multiple Users:** If you are offering multiple appointment types at different times/days of the week and have multiple colleagues associated with each appointment type, you will need to define your Business Hours in terms of the working hours comprising all availability for all of your **Services** and **Staff**.

Use the icons found in the columns to the right to Add/Delete windows of time or remove days of the week that should not be bookable by any Staff. Scroll to the top of the page to **Save** (upper-left), when you are finished.





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Step 3: Customize Booking Page

Click **Booking Page** from the left-navigation pane to make edits to the configuration of your Booking Page. Here you can set access, retrieve your unique Booking Page URL to be shared, set your Default Scheduling Policy, set your time zone, and customize the look and feel for those who land on your page to book an appointment with you.

The screenshot shows two main sections. The top section, 'Configure booking page', has a dropdown menu set to 'Available to anyone' with a subtext 'People on the internet can book with a public self-service page'. Below this, there are buttons for 'Your booking page:' with a URL, 'Email', and 'Embed'. The bottom section, 'Manage your booking page', contains a list of settings: 1. Business page access control, 2. Default scheduling policy, and 3. Region and time zone settings.

Note: The settings found in the Default Scheduling Policy are also the default settings in place for each of the Services (appointment types) you create. Each new Service can either take the defaults created here, or you can override the default scheduling policy with unique settings you define (see Step 3, D2: Default Scheduling Policy).

C Configure Booking Page

Set or modify permissions for who should be able to see the Bookings Page, check availability, and book appointments.

- **Available to anyone:** Anyone with the link and internet access can view the Booking Page.
- **No self-service:** Your calendar will not be published. You can use this option to 'unpublish' your calendar as well.
- **Available to people in your organization:** Only individuals that authenticate through Princeton CAS can access the page.

The screenshot shows a dropdown menu with four options: 'Available to anyone', 'No self-service', 'Available to people in your organization', and 'Available to anyone' (repeated). Each option has a brief description of its permissions.

Note: Students may be trying to book time with you via their personal device, which may not be logged into the Princeton network. Choosing to make this **Available to Anyone** will allow anyone with the link to book time with you.

D Manage your Booking Page

The fields in the **Manage your Booking Page** section provide an opportunity to further manage access and data usage consent. The two main components to focus on are under the Business Page Access Control section:

1 Business Page Access Control

- **Disable direct search engine indexing of booking page:**

This setting prevents your page from appearing in the search results for Google, Bing, and other search engines. Selecting this box will ensure access to the page is limited to the generated page link. If this feature is not disabled, anyone can find the Bookings Page on the open web and book time on the calendar.

The screenshot shows the 'Business page access control' section with a checked box for 'Disable direct search engine indexing of booking page' and an unchecked box for 'Require a one-time password to create bookings'.

- **Require a one-time password to create bookings:**

When this option is enabled, the user will be prompted to verify their email address by retrieving and entering the verification code sent to the email address provided in order to proceed with the booking.

The screenshot shows a 'Verify your email' prompt with a text input field for a verification code and buttons for 'Go back', 'Send me the code again', and 'Continue'.



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2 Default Scheduling Policy

The settings found here are the default settings you determine for each of the Services (appointment types) you create in the Calendar. Each subsequent Service create can either take the defaults you create here, or you can override the default scheduling policy with unique settings you define.

The screenshot shows the 'Default scheduling policy' settings page. It includes sections for:

- Time increments:** Set to 30 minutes.
- Minimum lead time:** Set to 24 hrs.
- Maximum lead time:** Set to 21 days.
- Email notifications:** Both 'Notify the business via email when a booking is created or changed' and 'Send a meeting invite to the customer' are checked.
- Staff control:** 'Allow customers to choose a specific person for the booking' is checked.
- Availability:** 'General availability' is set to 'Bookable when staff are free'. A link at the bottom says 'Set different availability for a date range'.

- **Time Increments:** You can set up the increments for appointment times in increments of 5 minutes to 4 hours.
- **Minimum Lead Time:** This is how many hours you want in advance to prepare for an appointment. For example, are you able to respond to same day appointments? If not, consider allowing for a 24-hour minimum lead time.
- **Maximum Lead Time:** How far in advance should users be able to book appointment with you? Should you have your calendar bookable for a semester? The default is 365 days.

Email Notifications

- **Notify the business via email when a booking is created or changed:** When this option is selected, notifications are sent to the 'business' email address provided in the [Send Customer Replies to](#) field in the Business Information section.
- **Send a meeting invite to the customer:** This option allows those booking time with you to add a placeholder for this appointment to their personal calendar.

Staff Control

- **Allow customers to choose a specific person for the booking:** If you have multiple Staff members setup for a Service, this setting allows for users to select from a list of those available Staff to meet with.

Availability

In general, a Service can be booked when its Staff are free. If you wish to customize this further, you have the option to change the General Availability or set custom availability for a specific date range.

Note: Use caution when applying the Default Scheduling Policy to other Services created, as this will affect availability for those Services.

3 Region and Time Zone Settings

Use this section to verify the current time zone reflects your current geographic location. Select the option to **Always show time slots in business time zone.**

The screenshot shows the 'Region and time zone settings' page. It includes:


- Language:** Set to English (United States).
- Current time zone:** Set to (UTC-05:00) Eastern Time (U...).
- Always show time slots in business time zone:** This checkbox is checked.




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Step 4: Add Staff


The Staff page is where you add and manage staff member details and their specific availability.

 **Note:** By default, the creator of the Calendar is pre-populated in this area with the role of Administrator.

Click [Staff](#) from the left-navigation and click the [Add New Staff](#) button. 

Upon adding a new Staff member, assign them an appropriate role.

- **Administrator:** Can edit all settings, add and remove staff, and create, edit and delete bookings.
- **Scheduler:** Can manage bookings and customer details on the calendar, itself. They have 'read-only' access to settings, staff, and services.
- **Team member:** Can manage their own bookings calendar and can edit their own availability. When adding or editing a booking in their calendar, they'll be assigned as Staff.
- **Viewer:** Can view all the bookings on the calendar but cannot modify or delete. Permissions are set to 'read-only'.
- **Guest:** Can be assigned to bookings but cannot open the Bookings mailbox.

 **Note:** It is a best practice to have more than one Administrator of the Calendar.

Email notifications:

Checking this box will enable the Staff member to receive emails when a booking with them is made or changed.

Notify the staff member via email when a booking assigned to them is created or changed

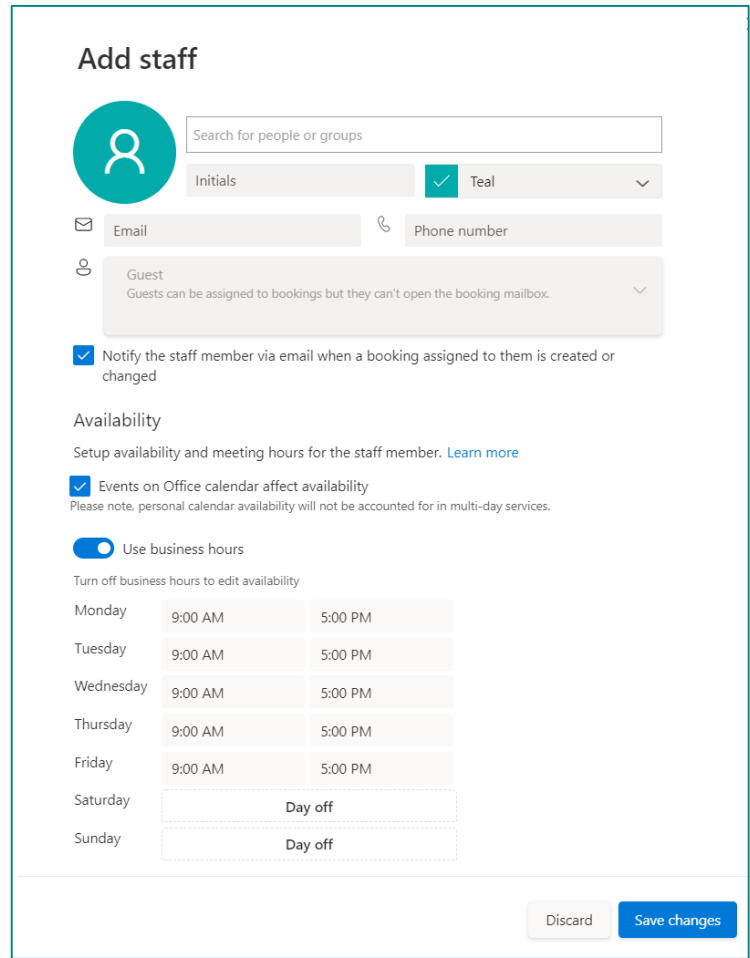
Availability:

Availability

Setup availability and meeting hours for the staff member. [Learn more](#)

Events on Office calendar affect availability
Please note, personal calendar availability will not be accounted for in multi-day services.

Select [Events on Office calendar affect availability](#) if you want the free/busy information from Staff members' **Outlook** calendars to reflect availability in Bookings.



Add staff

Initials

Email Phone number

Guest

Notify the staff member via email when a booking assigned to them is created or changed

Availability

Setup availability and meeting hours for the staff member. [Learn more](#)

Events on Office calendar affect availability
Please note, personal calendar availability will not be accounted for in multi-day services.

Use business hours

Turn off business hours to edit availability

Monday	9:00 AM	5:00 PM
Tuesday	9:00 AM	5:00 PM
Wednesday	9:00 AM	5:00 PM
Thursday	9:00 AM	5:00 PM
Friday	9:00 AM	5:00 PM
Saturday	Day off	
Sunday	Day off	

If the **Staff** member's availability differs from the Business Hours entered in the Business Information section, toggle the [Use Business Hours](#) off and edit the hours of availability as appropriate.

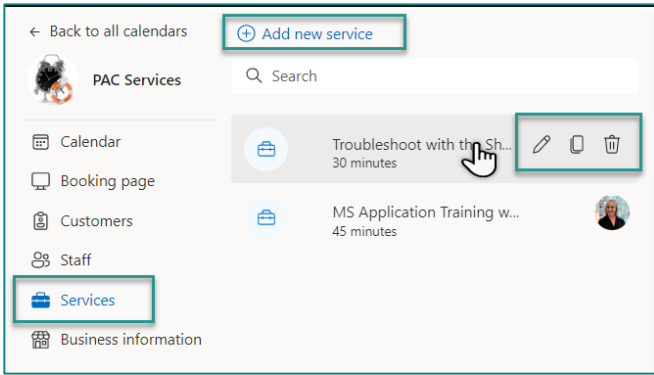


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Step 5 – Define Services

In this section, set the details of each of the Services you plan to offer. Select the **Services** tab from the left-navigaton. Here, you can add new services or edit existing services.

To add a new Service, click the **Add New Service** button.



At a minimum, one service is required at all times. By default, Bookings has created a Service which should be edited to suit your needs or deleted once another Service has been created.

- **Edit service:** Hover over an existing Service and click the **Edit Service** icon, revealed to the right of the Service name.
- **Deleting a Service:** Hover over an existing Service and click the **Delete Service** icon, revealed to the right of the Service name.

Note: If only one Service is listed, you will not be able to delete it. There must be at least one Service listed at all times.

- **Copy/Clone a Service:** If an additional Service should be created that is very similar to an existing Service, hover over an existing Service and click the **Copy Service** icon. Edit the Service details as appropriate.

- A Basic details
- B Availability options
- C Assign staff
- D Custom fields
- E Notifications

Adding/Editing a Service is comprised of 5 sections. The details in each section will help you further define your Service.

Be sure to go through each of the options listed to ensure your Service, its availability, Staff members, custom fields, reminders and notifications are reflected appropriately on the Calendar.

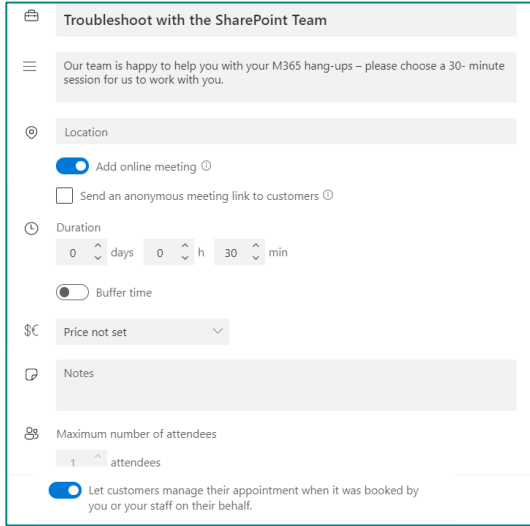
Don't **Save** until all sections are complete.

A Basic Details

Give your Service a name and description to ensure those who book time with you are selecting the correct offering.

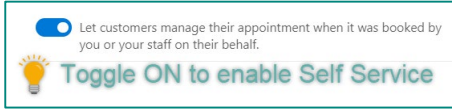
In the Location field, choose whether this appointment should take place in a physical location or choose to Add an Online Meeting.

Note: Choosing **Add Online Meeting** will provision a meeting link in Microsoft Teams. If you wish for the online meeting to take place in Zoom, a PMI can be added in the Location field or added to your confirmation email.



- **Duration:** Choose the appropriate amount of time for the appointment.
- **Buffer Time:** Enabling this setting allows for the addition of extra time to the Staff members calendar before and/or after each appointment to prepare or debrief, as necessary.
- **Maximum number of Attendees:** This setting allows you to create services that require the ability for multiple people to book the same appointment date/time with the same staff member. The appointment time slot for the selected service, staff, and time will be available to book until the maximum number of attendees, specified by you, has been reached.

Note: It is important to determine whether this is a single-attendee service or multi-attendee service prior to saving the service. Once the Service is saved for a single attendee, the Max Number of Attendees **cannot be changed** to allow for more than one attendee. Likewise, if the Service is saved for multi-attendees, it cannot be changed to less than 2.



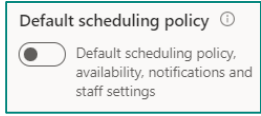
Step 5 Continued: Define Services



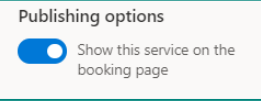
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As you continue to define your Services, you'll notice there are two additional switches under the five sections:

Default Scheduling Policy: Determine whether this Service should take the Default Scheduling Policy. If not, turn this setting off and edit details accordingly.



Publishing Options: If a specific Service should not be shown on the Booking Page for a period of time, simply toggle this setting OFF.



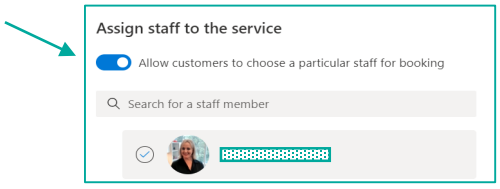
B Availability Options

The options here will default to the scheduling details you provided on the Booking Page. If this Service is NOT taking the Default Scheduling Policy, use the fields in this section to customize your availability settings as appropriate. See Page 5: [Booking Page > Default Scheduling Policy](#)

C Assign Staff

Make sure to add the appropriate Staff member(s) to their corresponding Service.

If you wish for those booking time with you to choose from a list of multiple Staff members, toggle the switch below **ON**.

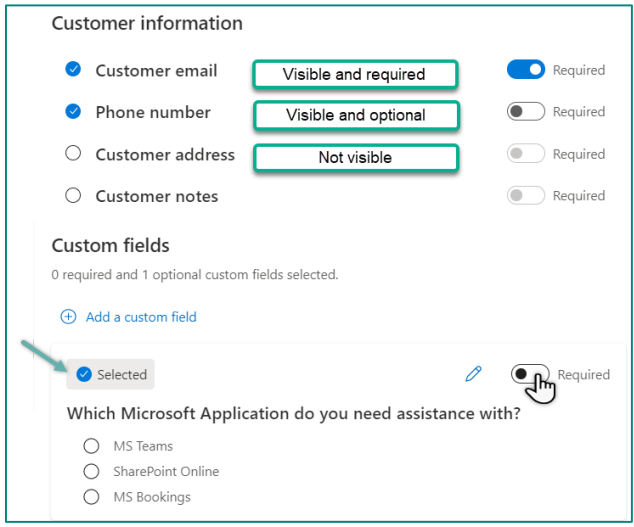


D Custom Fields

This section allows you to determine which of the canned information fields should be captured on the Booking Page for the user to provide and whether the fields should be required or optional. Additionally, Bookings lets you create custom questions associated with your Service

Select each of the default fields under Customer Information that should be visible on the Booking Page and determine which should be required by toggling on/off.

If additional information should be collected, click [Add a Custom Field](#). Once the question has been created, you will need to select it and determine whether the field should be required.



E Notifications

Here, you can set up reminders and notifications which can be sent to those booking appointments with you, the Staff member(s) associated with the appointment types, or both, at a specified time before the appointment. Multiple messages can be created for each appointment, according to your preference. By default, a reminder is sent those who book time with you one day before. You can customize this message and determine the number of reminders that go out and when.

Text Message Notifications: If you're requiring a phone number, decide whether notifications should be sent via text message.

Email Notifications: Determine whether the business should be notified when an appointment is created or changed and whether the person booking time with you should receive a meeting invite to add to their calendar.

Email Confirmation: You can include any additional text you would like here, such as information about rescheduling or what should be brought to the appointment.

When all information has been entered, click [Save Changes](#) button.



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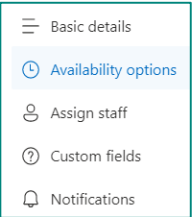
Opening Blocks of Time (Ad-hoc Hours) for Faculty Advising on the Fly

Users may find it more appropriate to quickly open blocks of time strictly for specific (non-recurring) dates/times outside of their general availability. Because this is not how Bookings was initially designed to work, some modifications to the Availability Options for the appointment type (or Service) being offered must be made.

The steps below will assist with the necessary configuration:

1. Click **Services** from the left navigation menu.
2. Choose to either create a new Service OR edit an existing Service.

Each section on the Service menu should be reviewed and edited as appropriate ([see more info](#)), but the main elements to pay attention to are:

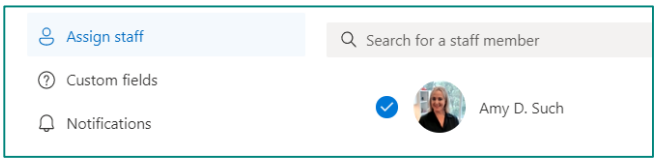


3. Under **Basic Details**:
 - Duration: Set your appointments to the appropriate timeframe.
4. Under **Availability Options**:
 - Time Increments: Enter the appropriate number of minutes for which your Booking Page should show availability.
 - Minimum Lead Time: Enter the amount of advance notice you'll need prior to an appointment being booked.

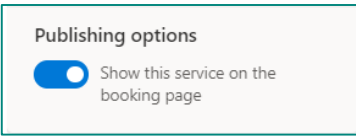
- General Availability: Set this to **Not Bookable**.
- Click **+ Set different availability for a date range** and enter the appropriate availability during these dates.
 - Repeat this for each week of time you wish to open up.
 - Use the + to add more than one block of time for a given day.
 - Use the trash icon to delete a day during the timeframe selected.

Note: Be careful to limit the blocks of unique availability to one week at a time only, making sure that dates line up to days of the week. You may need to delete days if your blocks of time start later in the week.

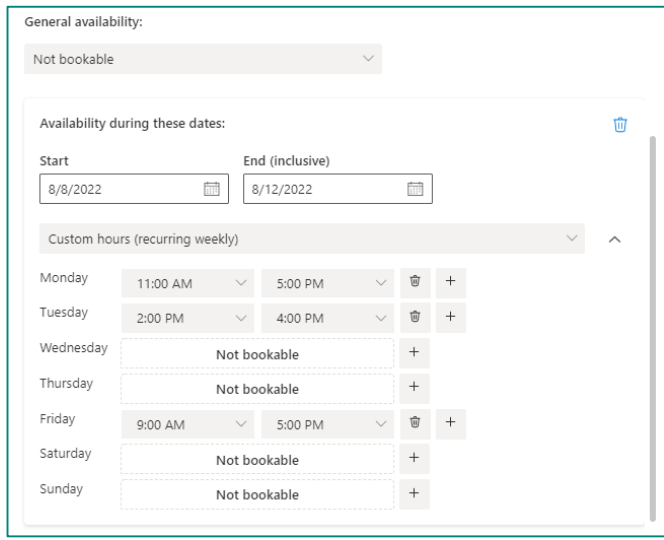
3. Under **Assign Staff**:
 - Make sure to assign yourself (or the appropriate Staff member) to this appointment type (Service) by checking the box next to your name.



4. Ensure that the Service is published on the Booking page by toggling the switch **ON**, if it's not on by default.



5. Click **Save Changes**.



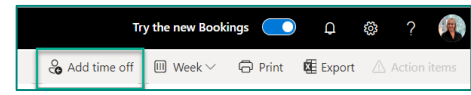


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Step 6: Schedule Closures and Time Off

Occasionally, you'll want to close your business for holidays or team events, or your employees will need time off when they're sick, on vacation, or unavailable for other reasons. You can schedule time off from the Microsoft Bookings calendar, and the employee will be unavailable for bookings during the specified time. Once the business reopens or employees return to work, everyone will be listed on the booking page according to their established work hours.

Click [Calendar](#) from the left-navigation. Locate and select [Add Time Off](#) from the top menu, above the calendar.



Schedule Employee Time Off

1. Fill in any necessary fields under [Time Off Details](#).
2. If the employee will be gone for a full day or for several days, switch the toggle for **All day ON**.
3. Select the Staff member(s) who will be taking the time off.
4. Click [Create Time Off](#) to save changes.

Schedule Business Closures

1. Fill in any necessary fields under [Time Off Details](#).
2. If the 'business' will be closed for a full day or for several days, switch the toggle for **All day ON**.
3. Select **ALL** Staff members listed to ensure no availability is open.
4. Click [Create Time Off](#) to save changes.

