Microsoft Bookings Overview

What is Microsoft Bookings?

Microsoft Bookings is an Office 365 application used for appointment booking. It can be used for scheduling academic advising appointments, office hours, etc.

Who gets access to Microsoft Bookings?

Please note: a Microsoft Office 365 email is required to use Bookings.

- Full-time employees will have access to Bookings
- Students, sponsored/departmental accounts, most part-time staff, alumni and retired employees are not eligible to request, administer, or own a Microsoft Bookings site, but will be able to book appointments with employees that use the application
  - **Coming Fall 2020:** students will be able to search and book all appointments that are administered in Microsoft Bookings via Portal

How does Microsoft Bookings work?

Microsoft Bookings allows customers to access and schedule appointments through your business calendar. You can:

- Publish your business calendar online to share with your customers and team
- Customize the calendar to include your business hours
- Add or import customers to your Customer list
- Add or manage user permissions for your team members to access the business calendar
  - **Note:** Staff email addresses should be added in order for staff to receive Bookings notifications
- Add or manage the number of services customers are able to select from your business calendar
- Book an appointment on behalf of a customer; customers can also book appointments themselves
- Customize your bookings page by:
  - Adjusting scheduling policy settings (e.g. appointment time increments, minimum lead time, maximum lead time)
  - Adjusting language and time zone settings
  - Enabling or disabling customer email notifications
  - Adding a logo to your bookings page
  - Changing the colour scheme of your bookings page
- Embed the published business calendar on your website or Facebook page

How to create a business calendar with Microsoft Bookings

You can also access Microsoft Bookings using Microsoft Teams. Learn more about [how to access Microsoft Bookings in Microsoft Teams](http://portal.office.com)

1. Go to [http://portal.office.com](http://portal.office.com) and click on the 'Bookings' app. If the Bookings app does not appear on the homepage, click All apps > Booking:
2. On the top banner, click the ‘Get it now’ button.

3. In the setup pop-up window, enter your calendar name and business type in the respective fields. Click the ‘To Bookings’ button. Your calendar will be created and you will be redirected to the Bookings homepage.

4. Configure and customize the necessary settings for your calendar:
   a. Add your business information
   b. Set your scheduling policies
   c. Define your service offerings
   d. Create your staff list
   e. Set employee working hours
   f. Schedule business closures, time off, and vacation time
   g. Publish your booking page
   h. Create and staff your bookings
5. Once your calendar has been set up, go to the Booking Page tab and click 'Save and publish'.

![Save and publish button]

Booking page status
Not published

Booking page access control
- Require a Microsoft 365 or Office 365 account from my organization to book
- Disable direct search engine indexing of booking page

Customer data usage consent
- Show a personal data collection and usage consent toggle along with a message on my booking page

Enter your personal data collection and usage terms here.

6. Your Booking page status will now be updated to be Published. Click 'Copy' to copy the calendar link. Share the calendar link with your customers so that they can start booking! You can click the 'Open published page' button to preview your Booking page.

Learn more about how to book an appointment in Microsoft Bookings.
Related articles

- How to setup Office 365 in Thunderbird
- Forwarding email from your student Office 365 account
- Microsoft Bookings Overview
- How to access Microsoft Bookings in Microsoft Teams
- How to book an appointment in Microsoft Bookings

Need Help?
Contact the IST Service Desk at helpdesk@uwaterloo.ca or 519-888-4567 ext. 44357.