DIGITAL METRO NORTH

Microsoft Bookings Managing Services

For Administrators

Administrators of a Booking calendar are responsible for creating and managing the services that are offered by the department or work unit. After the initial set up of a service, the service will only require ongoing management.

Creating services

1. From the Bookings home page select **Services** on the lefthand side of the screen.

ŵ	Home
	Calendar
Ģ	Booking Page
ዖ	Customers
RR	Staff
ß	Services
ů	Business Information

2. Select **Add a service** from the top left hand side of the screen.



 Enter the name of your service in Service Name. This is a <u>mandatory</u> field, the service name appears on the Booking page and booking emails.

Service name
Peer Responder

4. A **Description** is recommended, this information is what appears in information icon on the self-service page. This is important for people be able to see what the clinic or service provides.



- Quick Reference Guide
- 4. Select **Add online meeting**, if **enabled** a link to a Microsoft Teams meeting, will be added to the calendar event.



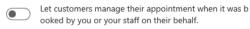
5. The **Join your appointment** link to the meeting will be added to all confirmation and reminder emails for example:

	Upcoming booking for
	test
Peer Res resch	ick reminder that your conversation with a ponder is coming up soon. If you need to dule let your Peer responder know and chedule through Microsoft Bookings.
	Peer Responder - Virtual with Jonaa Eva
	Thursday, 1 October 2020
	8:00 AM - 8:30 AM
	(UTC+10:00) Brisbane
	Join your appointment
	via Microsoft Teams

6. If appropriate, enter a **Buffer time** so you will be unavailable to be booked back to back and have enough time to set up between appointments.

Buffer time your customers can't book					
On On					
Before					
Hours 0 🗸	Minutes 10 $ \sim$				
After					
Hours 0 🗸	Minutes 10 🗸				

7. By turning **customer management** on, this will allow the person who has booked the appointment the option to change the date and time.



Note: This should not be used when the customer is a patient.



Custom fields

1. To edit a custom field, in the services tab click on **Modify.**



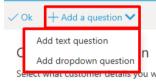
From this view you can select what information you would like displayed on your booking page.

2. Tick the **Required** box to make fields mandatory on the Booking page.

Customer information

Select what customer details you want displayed on the booking page. Na	me is always required.
Customer email	Required
Phone number	Required
Customer address	Required
Customer notes	Required

 To add another field click on + Add a question then select Add text question or Add dropdown question from the dropdown box.

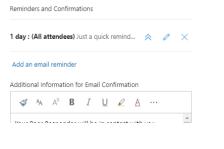


4. Enter the question for the booking in the custom field box and press **Save**.

🔛 Save	X Discard
Add a	a field
Enter inf	ormation about the custom field
Enter y	our question here

Reminders and notifications

1. To edit the reminder email, in the **Services** tab scoll down to **Reminders and Confirmations**.



2. To edit reminders select the pencil icon.

Reminders and Confirmations



- 3. Enter in the customised reminder in the reminder message box and **Save.**
 - a. Email reminder: Determine when the reminder is sent.
 - b. Send reminder to: Select who recieves a reminder.
 - c. Reminder messafe to send: Enter the message that it to be sent.

a.	Email reminder	b.	Send rem	inder to	
	1 week	\sim	Custom	er	\sim
c.	Reminder message	to send			
	Enter reminder me	essage l	nere (opti	onal)	
		9	ave	Discar	d

4. To add a reminder select **add an email reminder** and to delete click the **cross**.

Reminders and Confirmations			
1 day : (All attendees) Just a quick remind	*	0	\times
Add an email reminder			

5. To add a message to the email confirmation, enter your text into the text field.

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	ny ad	dition	al info	ormati	on an	d links	to se	nd to peor
	-			vith vo				nis content

Managing services

1. Once services are created, ongoing management of services can be accessed from the **Services** tab.

	Manage services							
Create and edit your bookable services								
	Service	Duration	Default price	Assigned staff				
	Peer Responder - Face-to-Face	30 minutes	Price not set	No staff assigned	0 B			

2. Hover over the service you want to edit and select the **pencil** to access the settings.

Assigned staff		
No staff assigned	Ø	Ŵ
No staff assigned		

3. The service settings will open and you can modify. Remember to save any changes before closing.

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