

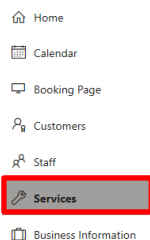
Microsoft Bookings Managing Services

For Administrators

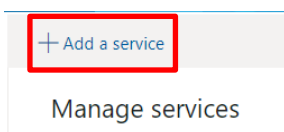
Administrators of a Booking calendar are responsible for creating and managing the services that are offered by the department or work unit. After the initial set up of a service, the service will only require ongoing management.

Creating services

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



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



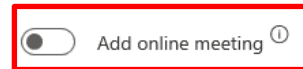
- Enter the name of your service in **Service Name**. This is a **mandatory** field, the service name appears on the Booking page and booking emails.

Service name

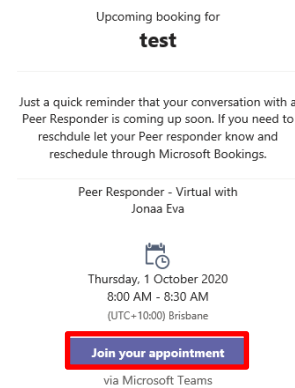
- A **Description** is recommended, this information is what appears in information icon on the self-service page. This is important for people be able to see what the clinic or service provides.

Description

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



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



- 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

Before

Hours Minutes

After

Hours Minutes

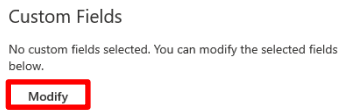
- By turning **customer management** on, this will allow the person who has booked the appointment the option to change the date and time.

Let customers manage their appointment when it was booked by you or your staff on their behalf.

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

Custom fields

- 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.

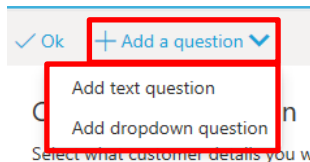
- Tick the **Required** box to make fields mandatory on the Booking page.

Customer information

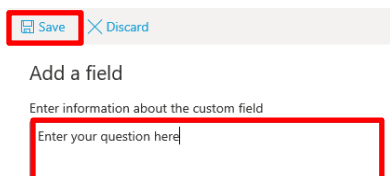
Select what customer details you want displayed on the booking page. Name is always required.

Customer email	<input checked="" type="checkbox"/> Required
Phone number	<input type="checkbox"/> Required
Customer address	<input type="checkbox"/> Required
Customer notes	<input type="checkbox"/> Required

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

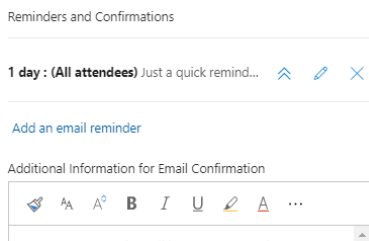


- Enter the question for the booking in the custom field box and press **Save**.

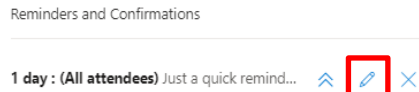


Reminders and notifications

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

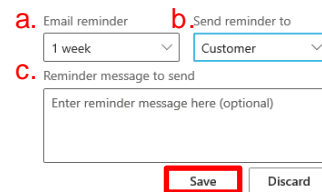


- To edit reminders select the **pencil icon**.

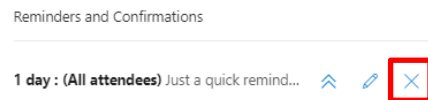


- Enter in the customised reminder in the reminder message box and **Save**.

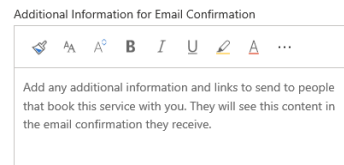
- Email reminder: Determine when the reminder is sent.
- Send reminder to: Select who receives a reminder.
- Reminder message to send: Enter the message that it to be sent.



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



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



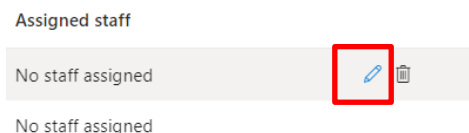
Managing services

- 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

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



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