Microsoft Bookings for better planning

Duration: 0,5 day
Audience: Pour tous

Who is this training for?

Anyone who wants to sell services and schedule appointments with customers through a website by offering an online calendar service.

Training objectives

- Be able to create a booking calendar.
- Be able to use Microsoft Bookings for online service booking.

Summary

Microsoft Bookings makes it easy to schedule and manage appointments with your clients or colleagues. By integrating a booking web page with Outlook, it optimizes your calendar and makes it easy for customers to book. During this training, you will learn how to create personal or shared booking pages, create your services, assign slots to speakers, share your booking pages and much more.

Course outline

Chapter 1- What is Microsoft Bookings

- What is Microsoft Bookings
- Use Cases
- Opening Microsoft Bookings

Chapter 2 - Creating a New Bookings Calendar

- Creating a Shared Calendar
- Setting Up the New Calendar
- Exploring the Bookings Calendar
- Setting Up the Calendar and Employees

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Chapter 3 - Defining Organization Details

- Basic Organization Details
- Terms and Conditions
- Logo
- Hours of Service

Chapter 4 - Define services and appointments

- Create types of services offered
- Service details
- Availability
- Assigned employees
- Custom fields
- Notifications

Chapter 5 - Add employees and manage appointments

- Assign staff members
- Add employees
- The different roles
- Modify availability
- Configure availability hours
- Add leave
- Determine employee availability
- View, manage and add customers
- Add appointments

Chapter 6 - Manage the booking page

- Configure the booking page
- Manage page access
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Add user consent

- Default schedule
- Customize the page
- Manage time zones

Approach and methodology

- Lectures
- Demonstrations

Prerequisites

Use the Outlook app.

Recommendations

- Have a good understanding of the Microsoft M365 ecosystem
- Be previously structured in the use of Outlook
- Need to automate and standardize your practices

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