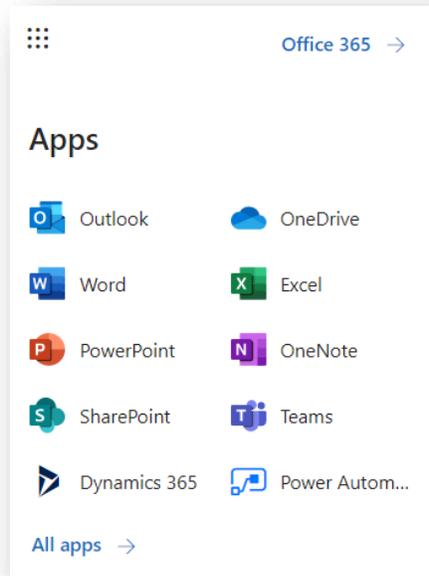


Microsoft Bookings Step-by-Step Guide

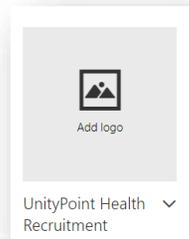
1. Login to the HUB
2. Top left corner click the  icon.
3. Select "All Apps"



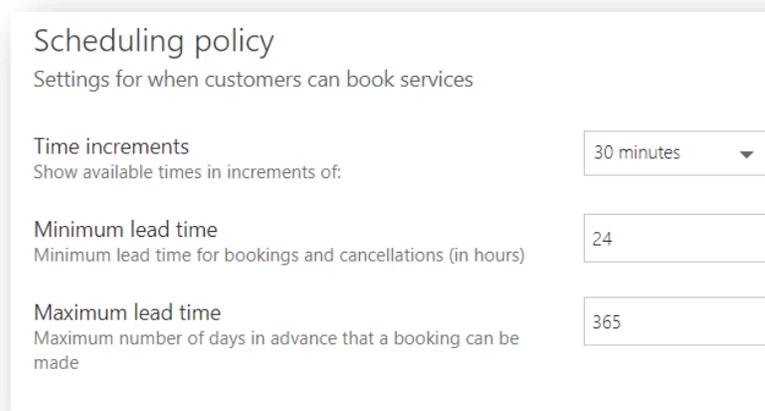
4. Select **Bookings**:



5. Select **Get It Now**.
6. Fill out your Business name in **Tell Us About Your Business** (Ex. UnityPoint Health – Des Moines Recruiting)
 - a. Skip Business Type and click Continue.
7. Add a UPH Logo to the "add logo" section in the top left corner then click save.

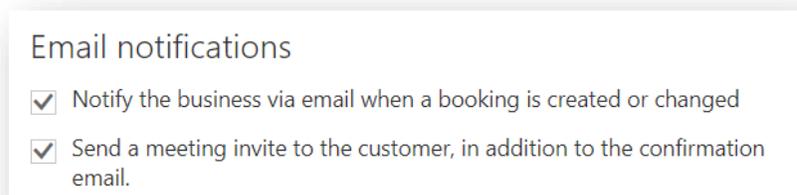


8. Select **Booking Page** to edit your Booking Page. Scroll to **Scheduling Policy**:

A screenshot of the 'Scheduling policy' settings page in Microsoft Bookings. The page title is 'Scheduling policy' with the subtitle 'Settings for when customers can book services'. There are three settings: 'Time increments' with a dropdown menu set to '30 minutes', 'Minimum lead time' with a text input field set to '24', and 'Maximum lead time' with a text input field set to '365'.

Time increments Show available times in increments of:	30 minutes
Minimum lead time Minimum lead time for bookings and cancellations (in hours)	24
Maximum lead time Maximum number of days in advance that a booking can be made	365

9. Edit your timeslot to your desired time for interviews. Edit the minimum (this is for scheduling and cancelling) and maximum (scheduling only) lead time to your desired lead time.
10. Scroll to **Email Notifications** and check both boxes:

A screenshot of the 'Email notifications' settings page in Microsoft Bookings. The page title is 'Email notifications'. There are two checkboxes, both of which are checked.

<input checked="" type="checkbox"/> Notify the business via email when a booking is created or changed
<input checked="" type="checkbox"/> Send a meeting invite to the customer, in addition to the confirmation email.

11. Scroll to **Staff** and deselect the box – you will own your own individual page so you will be the only option to schedule with.
12. Scroll to **Availability**. Leave it as the **bookable when staff are free** if you allow interviews during any open period you are at work.

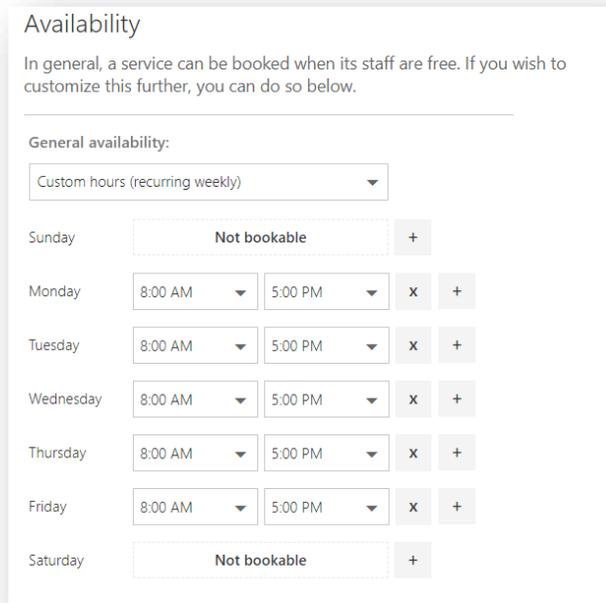
Availability

In general, a service can be booked when its staff are free. If you wish to customize this further, you can do so below.

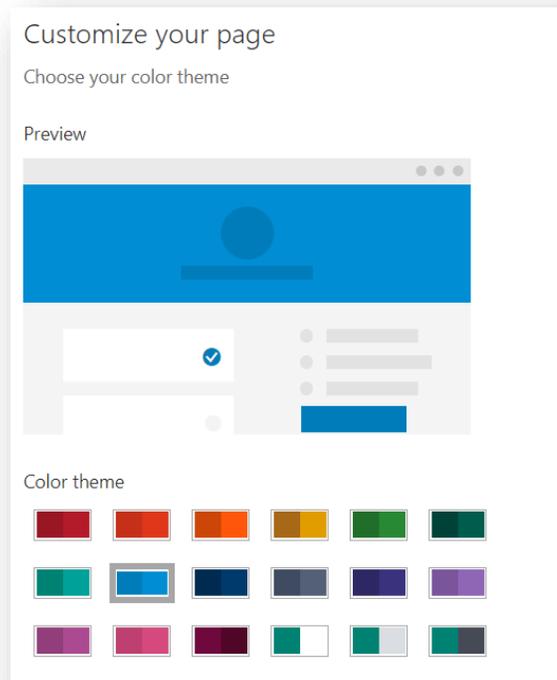
General availability:

Bookable when staff are free ▼

13. Select **custom hours** from the drop down under **general availability** to edit specific days/times during the week you are open to interviews:



14. Scroll up to “Customize Your Page” and select a color theme for your page:



15. Once finished customizing scheduling and theme, select **Save and Publish** in the top left corner of the page.
16. Click on **Services** from list on left & select **Initial Consult** to edit for interviewing.
17. Update **Service Name** to reflect Phone Screen; update description; remove location; edit **default duration** to length of phone screen (your choice); add buffer time if you wish; edit **default price** to **free**.

Enter information about your service

Service name

Description

Default location

Add online meeting ⓘ

Default duration
 Days Hours Minutes

Buffer time your customers can't book
 On

Before
 Hours Minutes

After
 Hours Minutes

Default price

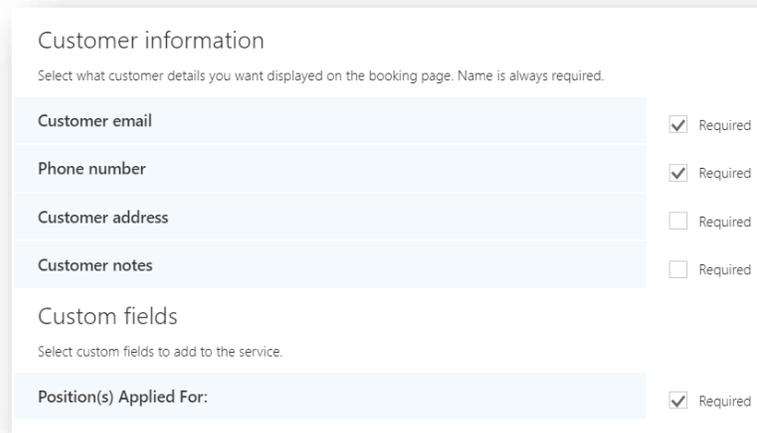
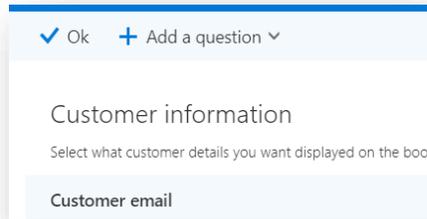
18. Edit Custom Fields – select **Modify**. Select the required fields you want the candidate to fill out. Recommended: Email, Phone Number as required.

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 checked="" type="checkbox"/> Required

19. Click on the **Add a Question** to create additional fields, add text question. Recommended: Position(s) Applied For. Make sure to select **required** on any question you add to ensure the candidate answers it. This will populate in the calendar invite.



Customer information

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

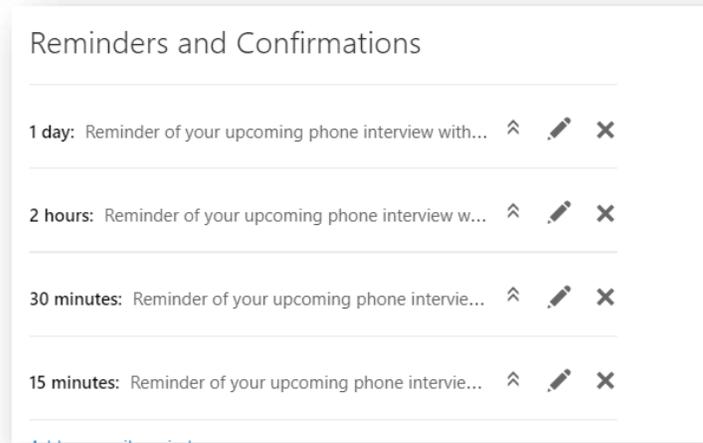
Customer email	<input checked="" type="checkbox"/> Required
Phone number	<input checked="" type="checkbox"/> Required
Customer address	<input type="checkbox"/> Required
Customer notes	<input type="checkbox"/> Required

Custom fields

Select custom fields to add to the service.

Position(s) Applied For:	<input checked="" type="checkbox"/> Required
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20. Edit **Reminders and Confirmations** to your preferred email reminder messages to candidates. You can also edit how many reminders and when the reminders are sent.
- Recommended: Reminder of your upcoming phone interview with a UnityPoint Health Recruiter. Please cancel or reschedule if you are unable to keep this connect.



21. Once finished editing reminders, scroll to top and click **Save**.
22. Go to **Booking Page** and copy your link.
23. Login to iCIMS and replace your ScheduleOnce link in your email template with your MS Bookings link and save the update. Now, candidates will schedule with your Bookings link.
24. Monitor your ScheduleOnce bookings and after the final phone screen booked through ScheduleOnce has occurred, login to ScheduleOnce and DELETE your account. This will remove any auto-renewal, etc. and inactivate your ScheduleOnce link.