

# Automate Appointment Scheduling With Microsoft 365 Bookings App

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Presented By  
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Strategic technology advisor to the profession w/ 35+ years of experience

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Former National Mid-market Technology Partner - BDO

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AICPA Business & Industry Hall of Fame Inductee

MICPA Innovative User of Technology Award

Past Chair of the Michigan Association of CPAs

Passionate advocate for the CPA profession!



# Learning Goals

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After attending this presentation, you will ...

- be able to identify how you can use the Bookings app to streamline your appointment scheduling with external users in Outlook.

# Presentation Outline

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- [Bookings App Overview](#)
- [Group Case Study](#)
- [Wrap-Up](#)

# Bookings App Overview

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- Facilitates external users booking appointments with you on a self serve basis
- You control the appointment booking rules
- Define multiple appointment types based on length, service, and staff
- Included with all Microsoft 365 business plans
- An extension of the Exchange email app

# External Booking Page Screen

**CPA Crossings, LLC**

**SELECT A SERVICE**

**Extended Call**

Please use this option to schedule a call for... Read more  
1 hour

**Touch Base Call**

Please use this option to schedule a call for... Read more  
30 minutes

Select a service to see available dates and times

**SELECT STAFF (OPTIONAL)**

Anyone

**SELECT STAFF (OPTIONAL)**

Anyone

**DATE**

< > April 2023

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

**TIME**

Select a service and date to see available times.

**ADD YOUR DETAILS**

Name \*  
Name

Email \*  
Email

Address  
Address

Phone number  
Add your phone number

Notes  
Add any special requests

**Book**

# Booking Page Setup Screen

The screenshot shows the 'Bookings' setup interface. At the top, there's a header with a hamburger menu icon and the text 'Bookings'. Below the header, there's a navigation bar with a back arrow and the text 'Back to all booking pages'. On the left, there's a user profile for 'JD Jane Doe' and a sidebar menu with options: Calendar, Booking page (selected), Customers, Staff, Services, Business information, and Integrations. The main content area has 'Save' and 'Discard' buttons at the top. The 'Configure booking page' section includes a dropdown menu set to 'Available to anyone' with a subtext 'People on the internet can book with a public self-service page'. Below this, the 'Your booking page:' URL is shown as 'https://outlook.office365.com/owa/ca...' with 'Email' and 'Embed' buttons. The 'Manage your booking page' section contains five expandable cards: 'Business page access control' (includes Office 365 control, search engine indexing), 'Customer data usage consent' (add personal data collection and usage consent message), 'Default scheduling policy' (default scheduling policy, availability, notifications and staff settings), 'Customize your page' (customize booking page to go with the brand of your organization), and 'Region and time zone settings' (choose your booking page language and time zone settings).

# Staff Setup Screen

The screenshot displays the 'Add staff' modal window within the 'Bookings' section of the CPA Crossings application. The modal is titled 'Add staff' and features a close button (X) in the top right corner. The user being added is identified as Marcia Sheehy, with a profile picture and a small 'x' icon next to the name. Below the name is a text input field containing the initial 'M'. To the right of the initial is a color selection dropdown menu currently set to 'Orange Dark'. Below these fields are two input fields: one for the email address 'msheehy@cpacrossings.com' and another for the phone number. A 'Team member' role is selected from a dropdown menu, with a description: 'Team members can manage their availability as well as bookings assigned to them. When adding or editing a booking, they'll be assigned as a staff.' Below the role selection is a checked checkbox for 'Notify the staff member via email when a booking assigned to them is created or changed'. The 'Availability' section includes a link to 'Learn more' and a checked checkbox for 'Events on Office calendar affect availability', with a note: 'Please note, personal calendar availability will not be accounted for in multi-day services.' There is also a toggle switch for 'Use business hours', which is currently turned on, with a note: 'Turn off business hours to edit availability'. At the bottom of the modal are two buttons: 'Discard' and 'Save changes'. The background of the application shows a sidebar with navigation options like 'Calendar', 'Booking page', 'Customers', 'Staff', 'Services', 'Business information', and 'Integrations'. The top navigation bar includes 'Back to all booking pages', 'Add new staff', 'Edit staff', and 'Book appointment'.

Services



# Services Setup Screen

← Back to all booking pages

CPA Crossings, LLC

- Calendar
- Booking page
- Customers
- Staff
- Services
- Business information
- Integrations

## Add service

- Basic details
- Availability options
- Assign staff **New**
- Custom fields
- Notifications **New**

**Default scheduling policy** ⓘ

Default scheduling policy, availability, notifications and staff settings

**Publishing options**

Show this service on the booking page

**Service name**

**Description**

**Location**

Add online meeting ⓘ

**Duration**

0 days 0 h 30 min

Buffer time

**Price not set** ▼

**Notes**

**Maximum number of attendees**

1 attendees

Discard Save changes

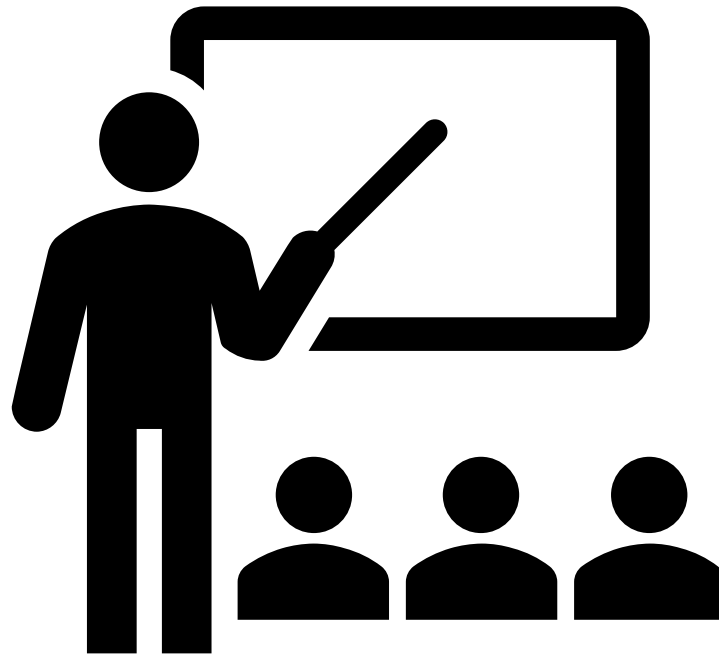
# Group Lab Exercise

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- Book appointment with John Higgins
  - <https://tinyurl.com/converge2023>
- Configure bookings page
- Configure staff
- Configure services
- Test it out

# WRAP-UP

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# Presentation Wrap-Up

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- The Bookings app is “low hanging fruit”
- Keep the setup as simple as possible
- Use Outlook Quick Parts to send link
- Make your clients aware of it, they’ll appreciate it!

# Questions ?

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# THANK YOU!

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We hope you enjoyed this presentation. To learn more about CPA Crossings visit [www.cpacrossings.com](http://www.cpacrossings.com)

