

## Resource Library

# SET UP VIRTUAL APPOINTMENTS IN MICROSOFT BOOKINGS

This guide is for setting up your Personal individual booking page, not a shared departmental calendar. This will help you configure Microsoft Bookings to accept client appointments using either Microsoft Teams or Zoom.

## CHOOSING YOUR MEETING PLATFORM

Before setting up your calendar, decide which video platform fits your needs.

FEATURE	MICROSOFT TEAMS	ZOOM
BEST USED FOR	Internal Meetings or clients already in the Microsoft ecosystem	External clients who prefer Zoom or highly interactive sessions
SECURITY	<b>High:</b> Creates a unique link for every single appointment	<b>Moderate:</b> Uses a static link (the same link for everyone unless you use advanced automation).
EASE OF SETUP	<b>Automatic:</b> Built directly into Bookings	<b>Manual:</b> Requires you to copy/paste as a link into settings.
CLIENT EXPERIENCE	Clients join via browser or Teams app	Clients join via Zoom Workplace app.

## MICROSOFT TEAMS APPOINTMENT SCHEDULE

1. Log into Microsoft Bookings: <https://outlook.office.com/bookings/homepage>
2. Locate the **Personal Booking Page** area and click + **Create Meeting Type** at the top half of the screen
3. Enter the meeting details: meeting **title, description, duration, etc.**
4. Switch **ON** the **Teams Meeting** option (it is on by default). This means Bookings will generate a Teams meeting link automatically.
5. Customize your schedule based on your availability. Click **Advanced options** to create buffer times (mandatory free time before or after the meeting) to prevent back-to-back meetings.
  - a. **Note:** Bookings automatically sync with your Outlook calendar. If you have an event marked 'Busy' in Outlook, clients cannot book you for that time.
6. Add **Lead time** to select how soon someone can book. Set this to 1 hour or 24 hours to avoid surprise same-day bookings.
7. Click **Add an email reminder** to the client to remind clients of the upcoming meeting.
8. Click **Add a follow up email** to automatically send a thank you note or survey after the meeting ends.
9. Click **Save** to complete the steps.

## ZOOM APPOINTMENT SCHEDULE

1. Create a recurring Zoom meeting:
  - a. Sign in to the FAU Zoom Web Portal at <https://fau-edu.zoom.us>
  - b. Go to **Meetings** and click on **Schedule a Meeting**.
  - c. Enter a clear name for the meeting.
  - d. Select **Recurring Meeting**, choose **No fixed time**, and enable the **Waiting Room** to control who enters the meeting.
  - e. **Save** and **copy** the meeting link.
2. Log in to Microsoft Bookings and create an appointment by following steps 2-8 in the Teams section above (skip step 3).
3. **Important:** Paste the Zoom link in the **Location** field **AND** Switch **OFF** the Teams Meeting option.
4. **Save** your changes.