

# Microsoft Bookings Setup – Implementation Checklist

This one-page guide walks you through configuring your Policy & Documentation Development service in Microsoft Bookings. Follow each step to load your branded confirmation, reminders, and follow-up templates.

## Open Service

- Go to <https://outlook.office.com/bookings/>
- Select **\*\*Services\*\*** in the left menu
- Click **\*\*Policy & Documentation Development\*\***

## Add Confirmation Email

- Scroll to **\*\*Notifications → Customer emails\*\***
- Find **\*\*Initial confirmation\*\*** → Edit
- Switch to HTML mode (</>)
- Paste the Confirmation Email HTML template
- Click Save

## Add Reminders

- Go to **\*\*Customer reminders\*\***
- Click **\*\*Add reminder\*\*** → set to 24 hours before → paste 24h Reminder HTML
- Click **\*\*Add reminder\*\*** again → set to 2 hours before → paste Same-Day Reminder HTML
- Save changes

## Add Follow-Up Email

- Find **\*\*After the appointment\*\*** section
- Enable it → paste Follow-Up Email HTML template
- Click Save

## Optional: No-Show Template

- Save the No-Show Template separately (Word/OneNote)
- When needed, open a booking → click **\*\*Send email\*\*** → paste template manually

## **Enable Online Meetings**

- At top of service setup → toggle **\*\*Add online meeting\*\*** ON
- Ensures Teams link auto-generates for clients

## **Test Booking**

- Book a test appointment with your email
- Check placeholders resolve: {CustomerName}, {StartTime}, {OnlineMeetingLinkOrLocation}
- Adjust tokens if needed and retest

**Tip:** Keep this checklist next to you when setting up Bookings. Once configured, all confirmations, reminders, and follow-ups will run automatically for your Policy & Documentation Development service.

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