ONLINE SCHEDULING PROGRAM FOR ADVISORS

Youcanbook.me is a free web-based program for online scheduling that advisors can use for their advisees to set up appointments.   It links to your Missouri Western Google calendar and the link can be sent through email, Facebook, Twitter, LinkedIn, etc., or it can be embedded on your website. You set the controls to best fit your needs (how far in advance they are allowed to make an appointment, length of appointment, what time of the day you allow appointments (8-4:30 or other time spans), etc.   You have control of whether it is online or offline so you can set it to use only during the priority registration time period. This does require you to keep your Google calendar updated for the time you have it online (ex: class, meetings, etc.).

Below are step-by-step instructions on how to set up an account. Please note that IMC or IT does not provide technical support for this program.

Visit www.YouCanBook.me

Click "Sign Up" in the upper right hand corner.

If you are already logged in to your missouriwestern.edu account in the same browser, the YouCanBook.me site will ask permissions to connect with your account. Click Accept.

If you are not already logged in to your missouriwestern.edu account click "Sign Up with Google".

Log in using your Western email (remember to include @missouriwestern.edu) and password. Allow YouCanBook.Me to access your account.

Add your details - name, organization, office, etc., and agree to the YouCanBook.Me terms.

Click the "Start creating my first booking page" button.

Choose your booking page title and unique page link url (and upload a logo if you'd like).

Once created, you'll be taken to the main dashboard. There you'll see your page, along with a toggle you can switch to make your page online or offline.

Click "Edit settings" underneath your booking page.

From Edit Settings" you will see multiple menus.

In the "General" tab, you can edit the title of your booking page, your URL, and can add an introduction to your page (for example, "Click on a time below to make an appointment")

Note: You will have access to paid features during the 14 day trial, but these features will not be available thereafter. YouCanBook.Me identifies which options are paid and which are not.

In the "Calendars and Teams" tab you will find all of your linked calendar accounts. Click the "Edit" button to select the individual calendars that YouCanBook.Me will use to check your availability. Teams are a paid feature.

There are multiple settings available in the "Times & Availability" tab:

- In the Availability submenu you can select work hours and add break times where no bookings are allowed.

- In the Duration & Display submenu you can select booking duration, minimum booking notice, and maximum number of days in advance a person can book an appointment.

- "Appointment Types" is a paid feature

- In the "Language & Timezones" submenu you can edit time zone, language, and date/time format

There are multiple settings available in the "Booking form" tab as well:

- In the Questions submenu you can add the questions and data fields that users will need to fill out and complete when making an appointment. This can include things like name, email, phone number, and G number.

  o We've found that it works best to make a name, email, phone, G-Number and a Notes/Reason for appointment box, all set as required. Otherwise we have had students submit only their name with no explanation for why they want to meet.

  o Click on each Booking Question to edit 1) the type of question, 2) the question's label (how it will appear on your booking page), 3) a shorthand code which you will use later, and 4) whether or not the question is required or not.

  o ***UPDATE***
     As we move to offering more virtual options for student appointments, consider adding a multiple choice question that allows students to select whether they want to meet in person, over the phone, over Zoom/webcam, etc. Be sure to give this question a shorthand code so you can set your calendar entries to show you at a glance whether a student is meeting in person or whether you need to, say, send them a Zoom link. If you click on this multiple choice question you can indicate in the "Text after the question" section that you will send them a Zoom link before their appointment. (YouCanBook.Me offers Zoom Integration with automatic Zoom link creation, but this feature is in Beta and is a paid feature as of 9/30/20.)

- In the AfterBooking submenu you can edit the confirmation message that is displayed after a person creates an appointment. Note that you can use shortcodes within curly brackets to refer to the person making an appointment by name.

- The Payments submenu can be used to calculate booking prices. You likely will not use this feature.

In the "Notifications" tab you can set up actions that are triggered after specific events and can edit how your booking will look on your calendar.

- The "Actions" submenu allows you to set up actions that are triggered…
  - After a booking is made (email to booker, email to you, etc)
  - If a booking I rescheduled (by you or by booker)
  - If a booking is cancelled (by you or by booker)(you can also set cancellation and reschedule limits)

  - Note that some of these options are paid features only, including SMS notifications which require purchasing SMS credits

- In the Calendar Events submenu you can edit how your booking will appear on your Calendar. Here you will use the shorthand codes (either the default or the ones you created) from the Booking form "Questions" submenu.

  - For example, if in the "booking form" tab you set it so that students are required to enter their Name and used, say, NAME as the shorthand code, you would enter {NAME} in the "Your calendar event title" box. The text they enter in the Name box would appear on your Calendar. If you required students to enter their First Name and Last Name in separate boxes and used FIRSTNAME and LASTNAME , respectively, as shorthand codes then you would enter {FIRSTNAME} {LASTNAME} (note the space) in the "Your calendar event title" box. The text they enter in the First Name and Last Name boxes are what would appear on your calendar.

  - ***UPDATE***
    You can use other shortcodes as well. If you added a "Zoom or In-Person?" multiple-choice question on your booking form and used VIRTUAL as a shorthand, you could put the shorthand after their name in the "Your calendar event title" box - {FIRSTNAME} {LASTNAME} {VIRTUAL}. Here, their first name, last name, and the choice they selected from the multiple choice options (say, "Zoom" or "In-Person) would appear on your calendar.

    Example: {FIRSTNAME} {LASTNAME} ({VIRTUAL}) = Max Griffon (Zoom)

  - You can also use shortcodes in the "Your calendar event description" box. Consider using the default, where the {FORMFIELDS} shortcode will add all of the answers to the Booking form questions on your calendar entry.

In the "Styles and Appearance" tab, paid users can change colors of their booking page.

If you have any basic questions that are not covered in these instructions, you can contact Derek Evans, Academic Advising, Student Success & Academic Advising Center, x5993 or devans4@missouriwestern.edu.