ONLINE SCHEDULING PROGRAM FOR ADVISORS

Youcanbook.me (YCBM) 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.

Go to www.youcanbook.me

Click "sign up" in the upper right hand corner.

Click "Create account via Google"

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, log in using your Western email (remember to include @missouriwestern.edu) and password. Click Allow.

From all pages of the dashboard you will have the opportunity to make your page "online" or "offline" using the toggle switch on the right side of the page.

Click the "edit profile" button. From the "edit profile" page there are multiple tabs, each of which contains multiple settings and options for customizing your page

- In the "basic" tab you can edit your booking page's URL, logo, the title of your page (I use "Student Success and Academic Advising Center"), and the text at the top of the booking grid that students/users will see when they set up an appointment. There is a

default message already listed. You can scroll down to preview how your booking page will appear to users. Your email should be listed next to "linked calendar". (Multiple calendars can be integrated by clicking on "change, but not without upgrading your YCBM account)

- In the "times" tab you can set the booking page to show the days you are normally available, including start and end time, minimum/maximum/default booking times, how many weeks are shown per page, etc. You can scroll down to preview how your booking page will appear to users.

- In the "advanced" tab you can set the notice needed to make an appointment, set the maximum advance booking time, and adjust time zone settings. You can also set a fixed start and end window for taking appointments if you only plan to utilize YCBM during a specific period of time. You can scroll down to preview how your booking page will appear to users.

- In the "booking form" tab you can create 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. Fields can be made required or optional. You can scroll down to preview how your booking form will appear to users. We've found that it works best to make a First AND Last name box, email, phone, and G-Number box, and a Notes/Reason for appointment box, all set as required. Otherwise we have had students submit only their first name with no explanation for why they want to meet. Be sure to create a "shorthand code" in the corresponding box. You will use this in a later tab.

- In the "services" tab you can create a page that allows users the option to select different reasons for why they are making an appointment (this option is available to "Premium accounts" only; however, this service was free when Student Success initially began testing YouCanBook.me.) For example, our office created the option for users to select from "Advisement", "Degree Plan", and "Other". Each service can be set to have a different default amount of time. Students who select "Degree Plan" are penciled in for 60 minutes, while those who select "Advisement" are scheduled for 30, etc.

- In the "teams" tab you can create a shared availabilities calendar. For example, if an office has multiple advisors/staff/faculty that a student can make an appointment with they can create a team and the YCBM calendar will show times that any team member is available. We have not used this feature in Student Success. See more here: https://www.youtube.com/watch?v=pXnxGw87BHI

- In the "afterwards" tab you are provided with many options for what occurs after a user books an appointment. After clicking the "afterwards" tab, there are a series of sub-tabs on the left side of the screen.

  o The "messages" sub-tab allows you to create the on-screen message that users see after booking an appointment.

- o The "the booking" sub-tab allows you to create how the information will appear in the calendar entry that is created when a user books an appointment. By default, all of the information entered in the booking form will appear in the calendar entry, so long as you keep {FORMFIELDS} in the "booking description" box. If, in the "booking form" tab you required students to enter their Name and used, say, NAME as the shorthand code, you would enter {NAME} in the "booking title" box in this sub-tab. 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 "booking title" box. The text they enter in the First Name and Last Name boxes are what would appear on your calendar.
  - o The "email to you" sub-tab gives you the option to have an email sent to your email account when somebody makes an appointment.
  - o The "sms to you" sub-tab gives you the option to have a text message sent to your mobile phone when somebody makes an appointment. You can also have text reminders sent a few hours before each appointment. (This services requires that you purchase "SMS credits")
  - o The "email to user" sub-tab gives you the option of having an automated email sent to a user immediately after they create an appointment. There is a default message, though you can add information in the text box (ex: location of office, and phone number in case they have any questions concerning their appointment.) See example attached. Additionally, you can edit what information appears in the email by editing the shorthand codes.
  - o The "sms to user" sub-tab gives you the option of having an automated sms/text message sent to a user immediately after they create an appointment. (This services requires that you purchase "SMS credits")

- The "tentative" tab provides options for you to allow tentative appointments to be made. This is a PAID feature.

- The "payments" tab is for businesses who want payment when a person makes an appointment.

- In the "cancellation" tab you can select different options for how to deal with cancellations. A {CANCEL} and {RESCHEDULE} shorthand code is, by default, included in the "email to user" sub-tab in the "afterward tab, providing a URL to cancel an appointment in the confirmation email that is sent to the user. You can edit the text they see when they visit this URL on the "page" sub-tab in the "cancellation" tab. The "limits" sub-tab on the left side of the screen allows you to set limits on cancellations.

- In the "reminders" tab you can set the system to send email and SMS/text reminders (both PAID options). If you're using your Google Calendar you can also have it add an email or pop-up reminder for you.

- In the "appearance" tab you can change select a number of different appointment page themes, adjust colors and fonts, and add a header or footer

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.