

*This tech recipe was made possible by a generous grant from the [Truist Foundation](#).*

## Tech Recipe: Using Asana and Google Calendar to Coordinate Client Food Pickups



There are many online scheduling tools you can use to **let your clients decide when to pick up food** at a time that works best for them. This can also help clients avoid long lines waiting at food banks and pantries while also helping you predict the busiest times for your organization.

Asana makes it easy to schedule and manage digital appointments for food pickups. This tech recipe will teach you how to **sync any responses from Asana with your Google calendar** so you can be notified when new submissions are received to help you plan ahead.

### CONTENTS

- **Who This Guide Is For**
- **Objectives**
- **Step-by-Step Guide**
  - Create a new intake scheduling form
  - Review new form submissions
  - Set up a rule to assign submissions to yourself
  - Schedule a new pickup request submission in Asana
    - Create a food pickup requests calendar project in Asana
    - Sync your Asana food pickup requests calendar with your Google calendar
- **Additional Resources**
  - Training + Services
  - Content + Community

### Who This Guide Is For

This guide is aimed at anyone who wants to learn how to use Asana to create an online scheduling form to help coordinate food pickups for their clients.

- **It's perfect for anyone who has at least a basic understanding of how to use Asana.** Even if you have intermediate or advanced knowledge of Asana, you'll likely also learn some useful tips and tricks.
- **Are you new to online booking forms?** This guide will show you all the steps to take to create a new intake scheduling form in Asana and view submissions.
- **Are you experienced in manually creating food pickup bookings for your food security organization?** This guide can help show you how to start using an online booking form and calendar to view and manage food pickups.

## Objectives

You'll learn how to

- Create a new intake scheduling form in Asana
- Assign a new form submission to yourself so that you can get notified of any new submissions
- Create a calendar project in Asana and schedule a new food pickup request
- Sync your Asana food pickup calendar with your Google calendar

**Need Asana?** Asana is available to TechSoup members. Visit [the program page on TechSoup](#) today to get started.

**Need Google Calendar?** A variety of Google products, such as Google Workspace for Nonprofits, are available to TechSoup members. Visit [the program page on TechSoup](#) today to get started.

## Step-by-Step Guide

[Asana](#) is a web and mobile work management platform that helps teams stay organized, on track and better manage their work. One of its many applications is to create a digital form that can be shared online, used to collect data, and schedule appointments.

**To use Asana** you'll need to have an Asana account and the necessary license (Premium, Business, or higher). For this tech recipe, you'll need to be familiar enough with using Asana to be able to create a new project.

Before you begin this tech recipe, you'll need to:

- Create a new Food Pickup Requests project in Asana
- Create a new Food Pickup Requests calendar in Asana

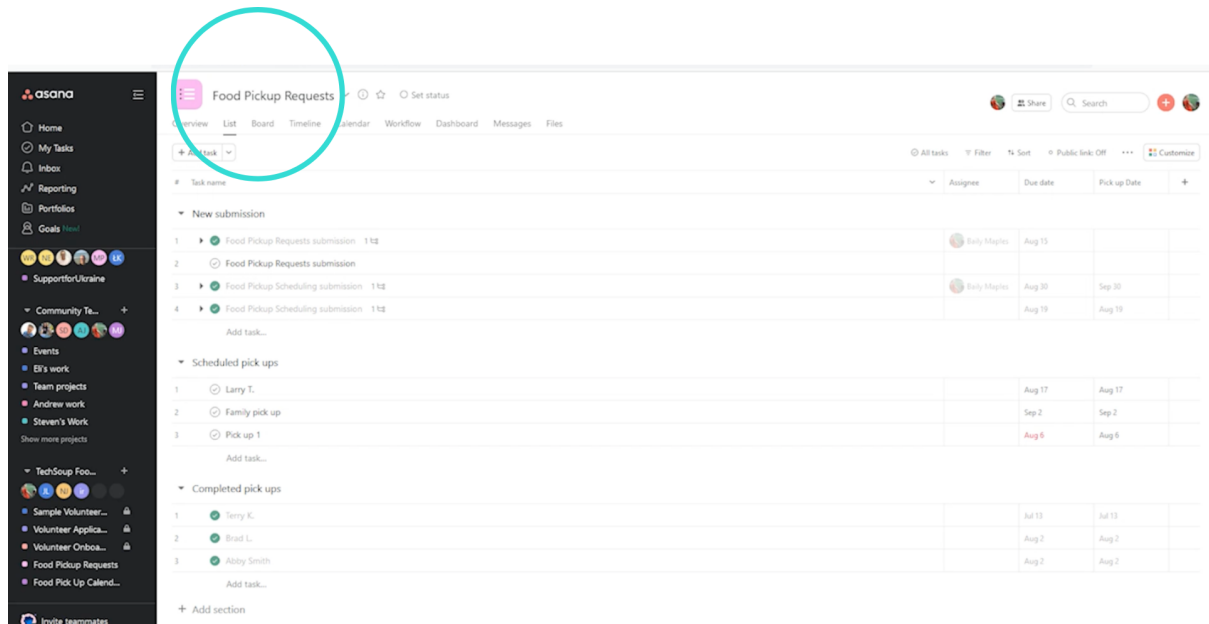
**To use the Google calendar**, you'll need a Google account.

### Create a New Intake Scheduling Form

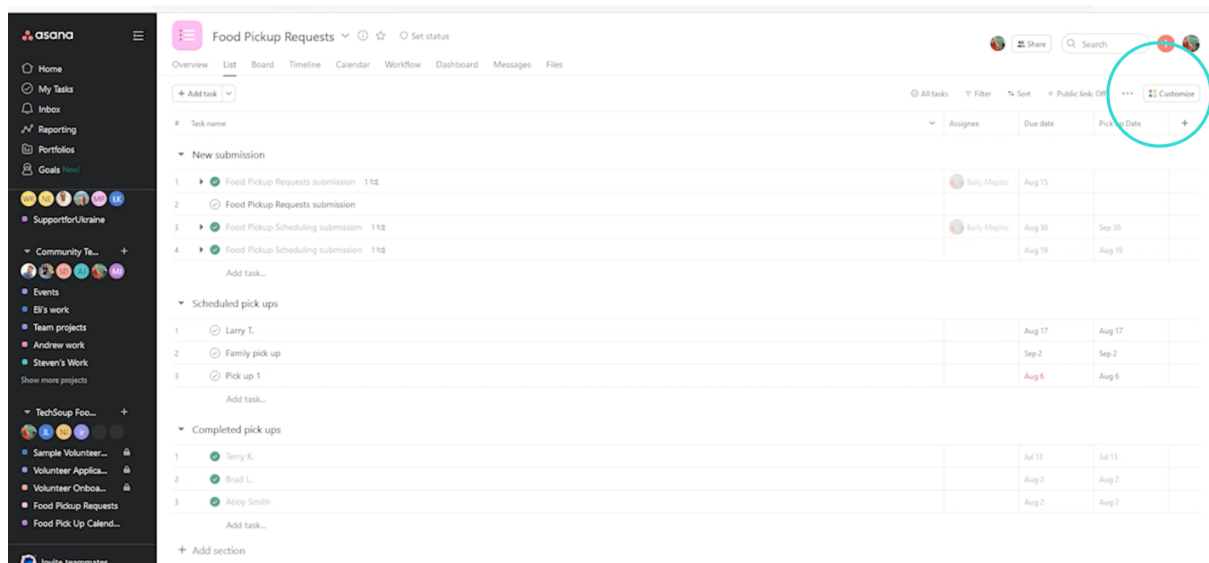
The first step in coordinating client food pickups is to create a new form in Asana that lets you capture information from clients (such as dietary preferences) and lets clients then select a date when they would like to pick up their food from your food bank or pantry.

**Tip:** Forms that you create using Asana have a URL link that you can embed on a website or Facebook page and share in a newsletter or via other digital channels. You can continue to edit your Asana form and the URL link will always remain the same.

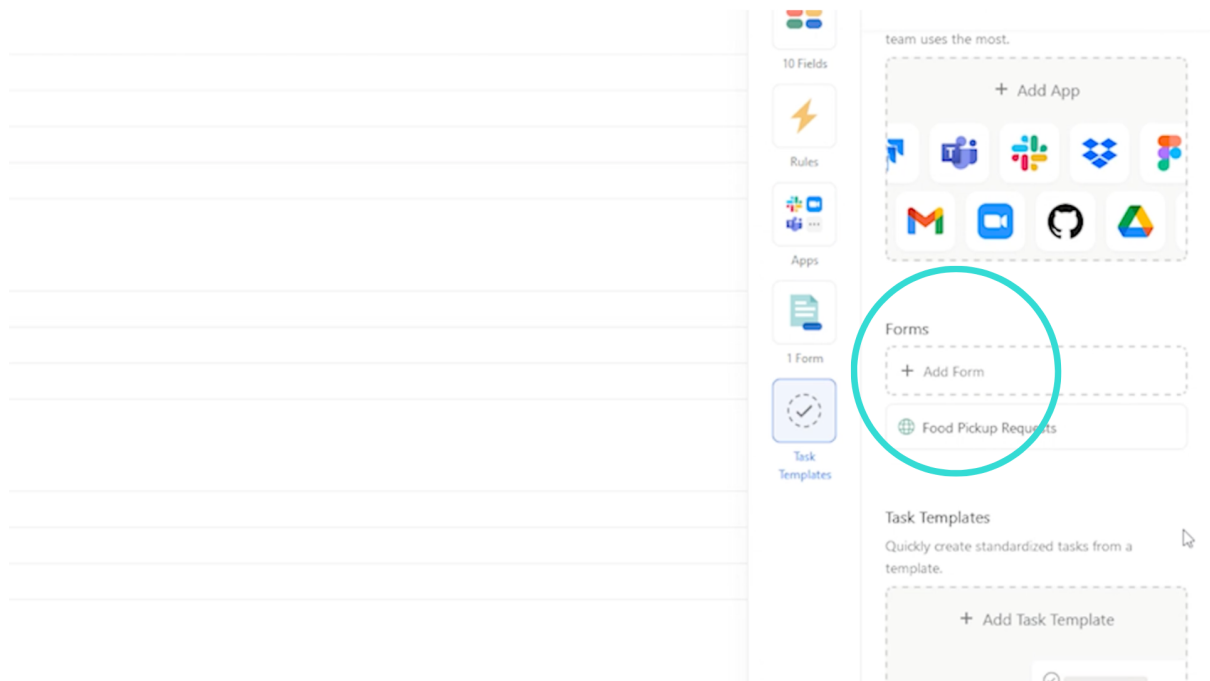
To create a new form in Asana, first ensure that you're in the Food Pickup Requests project that you created.




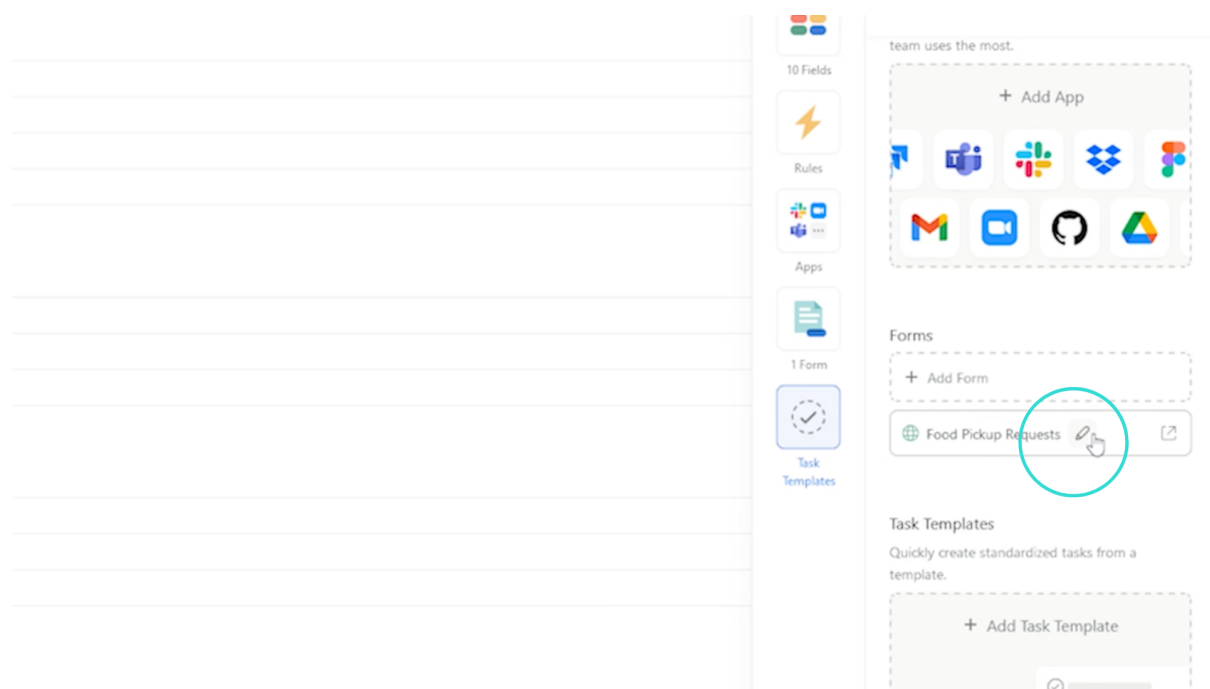
Click **Customize** (in the upper right corner).



Scroll down to **Forms**. Click **Add Form** to create a new form within this project.



In this example, we've created a form called Food Pickup Requests. **To edit the form**, click the  **Edit** icon.



**Tip:** You can add form fields and customize the form as needed. You can use the drag-and-drop editor to reposition fields and questions. And you can set some fields to "required" so people have to fill out those responses.

Here's an example of what your Food Pickup Requests form may look like.



**Edit form**

Anyone with the link can access and submit this form. [Change](#)

**Food Pickup Requests**  
Add form description

Name\*

Please provide any dietary restrictions.\*

Please provide food preferences.

Please provide your preferred confirmation method \*

☐ Phone call  
☐ Text message  
☐ Email

Please provide phone number/email address \*

**Questions** Settings

Add questions

- A Single line text
- Paragraph text
- # Number
- Single-select
- Multi-select
- Date
- Attachment
- Email address

**Tip:** Some of the fields and questions that you may want to have on your form: **Name**, **Dietary Restrictions**, **Food Preferences**, **Preferred Confirmation Method** (e.g., email, phone, text message), **Phone Number**, **Email Address**, **How Many People Need Food**.

It's important to set a preferred date for your client's pickup and make it a required field so that you can manage the scheduling of the food pickup. You should also connect the date field to a due date.

**To connect the date field to a due date, click **Connect to field** and select **Due date**.**

Please provide food preferences.

Date

Please provide your preferred day for pick up.

Add question description

☒ Required

Please provide your preferred confirmation method \*

☐ Phone call  
☐ Text message  
☐ Email

Please provide phone number/email address \*

**Connect to field**

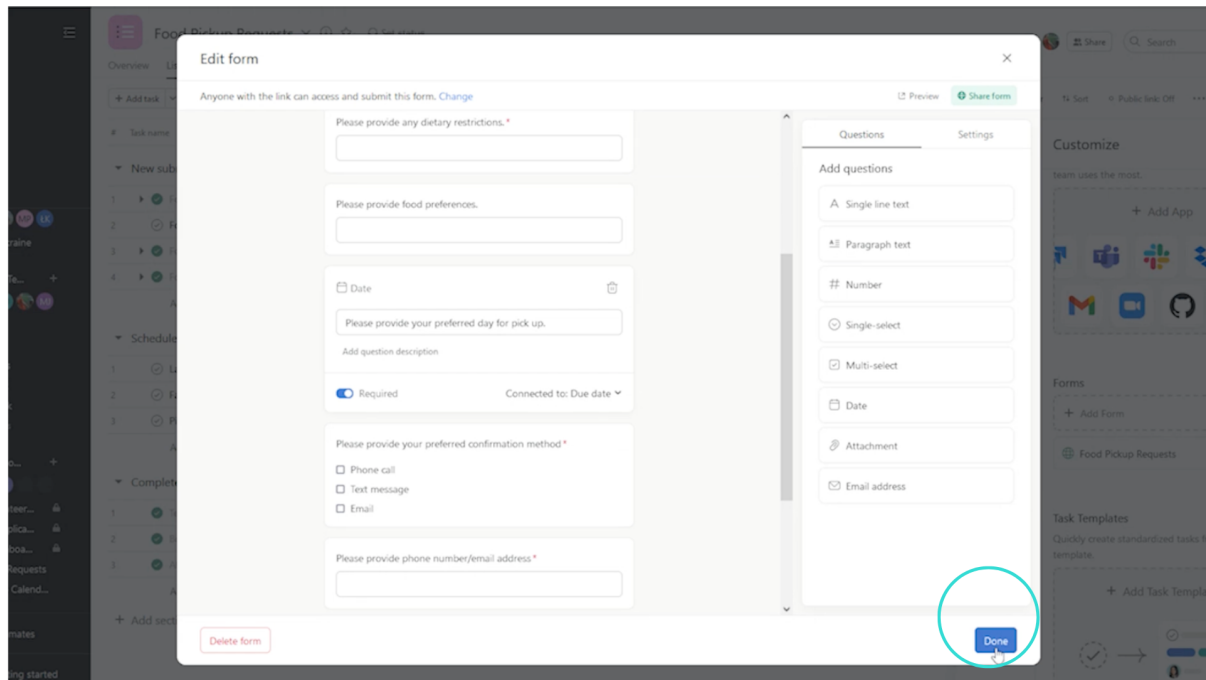
Available fields

- Task description
- Due date**
- + Add field...

**Add questions**

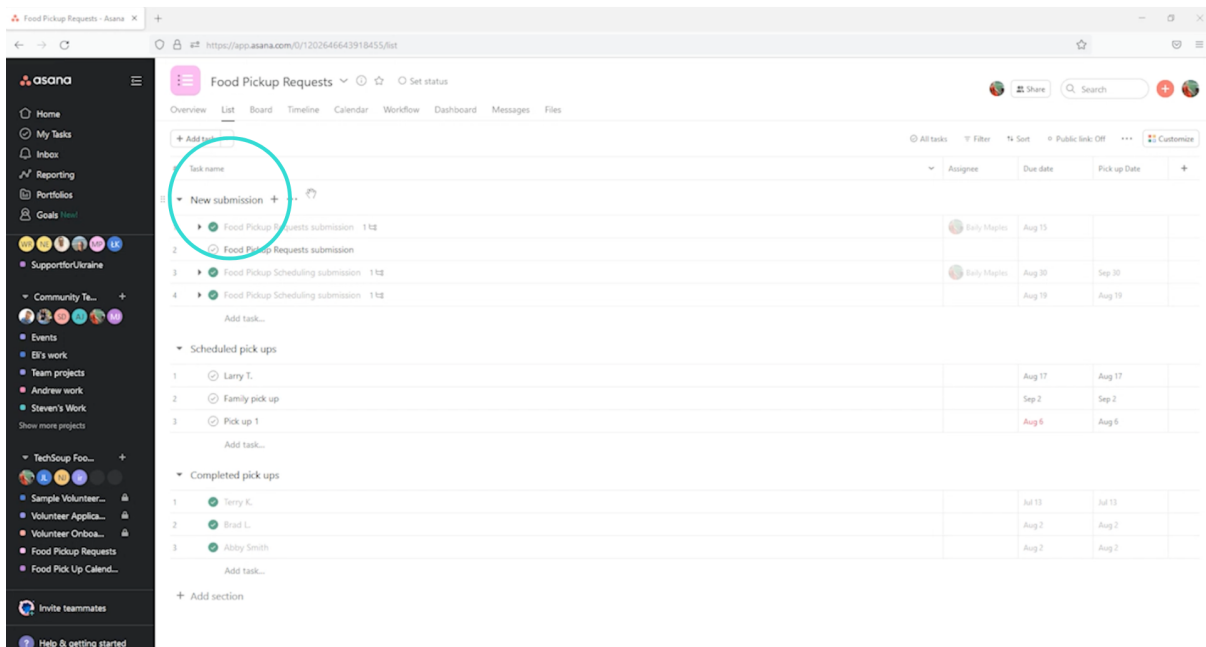
- A Single line text
- Paragraph text
- # Number
- Single-select
- Multi-select
- Date
- Attachment
- Email address

Click **Done** when you're finished editing the Asana form.



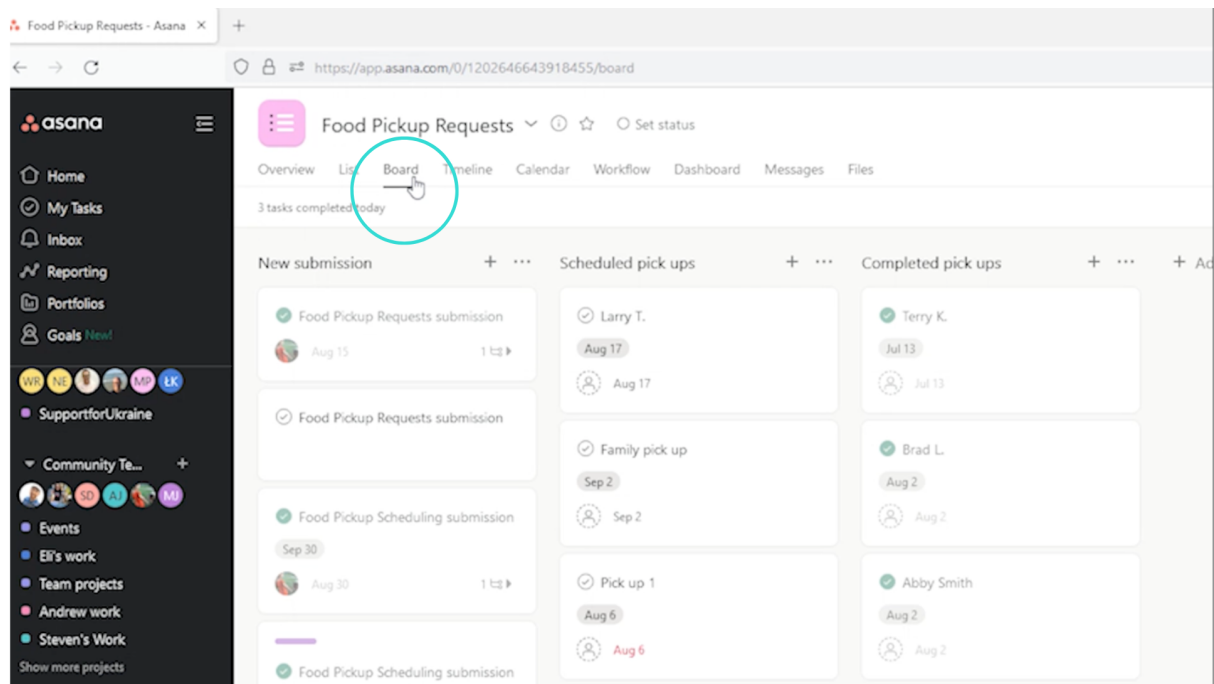
## Review New Form Submissions

All new form submissions appear under the **New submissions** section within your project.



Task name	Assignee	Due date	Pick up Date
<b>New submission</b>			
Food Pickup Requests submission	Early Mayes	Aug 15	
Food Pickup Requests submission	Early Mayes	Aug 30	Sep 30
Food Pickup Scheduling submission	Early Mayes	Aug 19	Aug 19
<b>Scheduled pick ups</b>			
Larry T.		Aug 17	Aug 17
Family pick up		Sep 2	Sep 2
Pick up 1		Aug 6	Aug 6
<b>Completed pick ups</b>			
Terry K.		Jul 13	Jul 13
Brad L.		Aug 2	Aug 2
Abby Smith		Aug 2	Aug 2

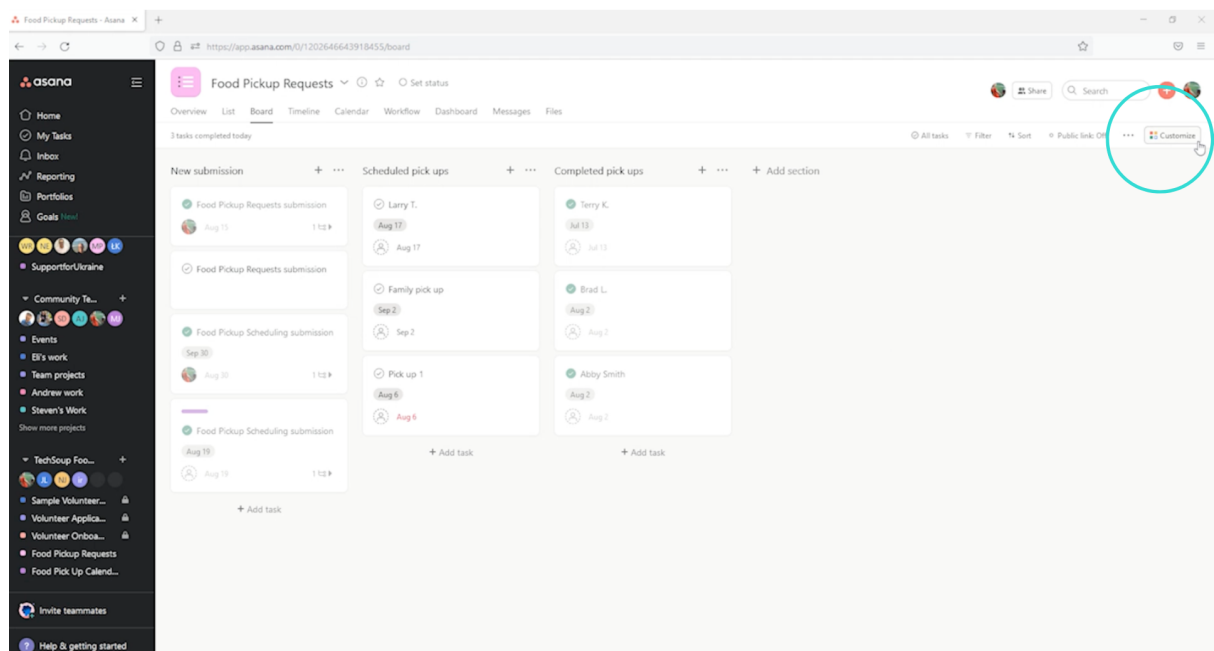
**Tip:** You can change the project view to make it easier to see the submissions. Click **Board** to see an overview of all submissions in a board layout.



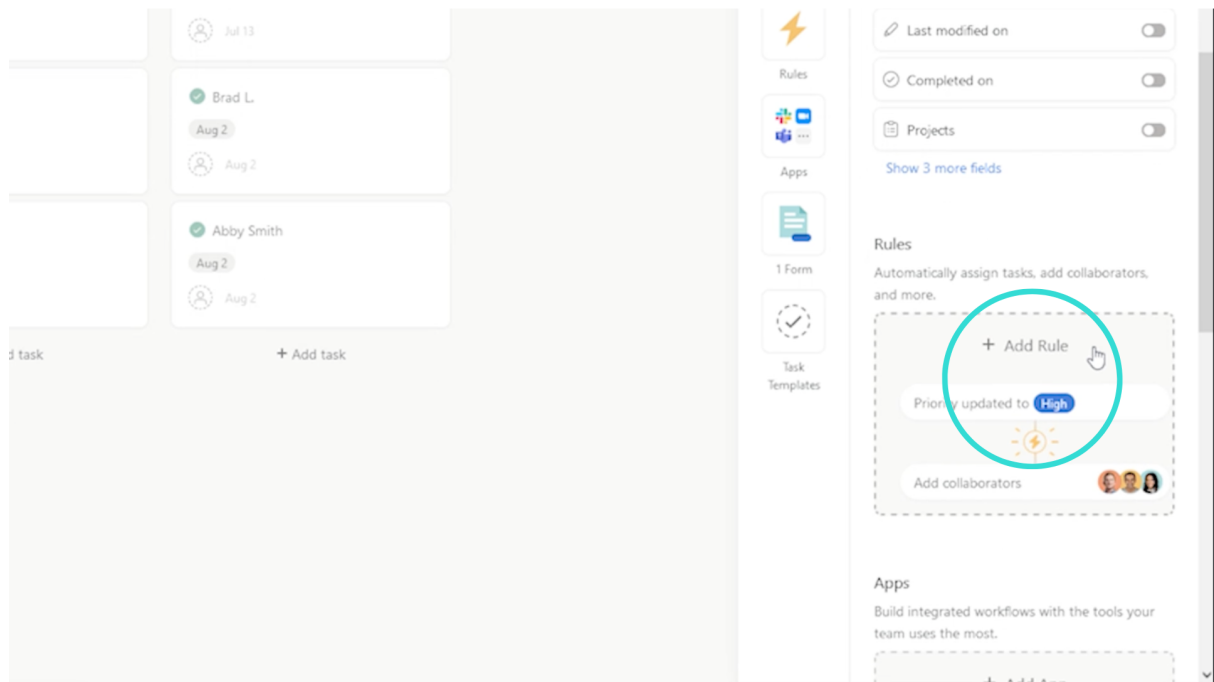
## Set Up a Rule to Assign Submissions to Yourself

By setting up a rule to assign form submissions to yourself, you can then receive email notifications each time a client submits a new food pickup form.

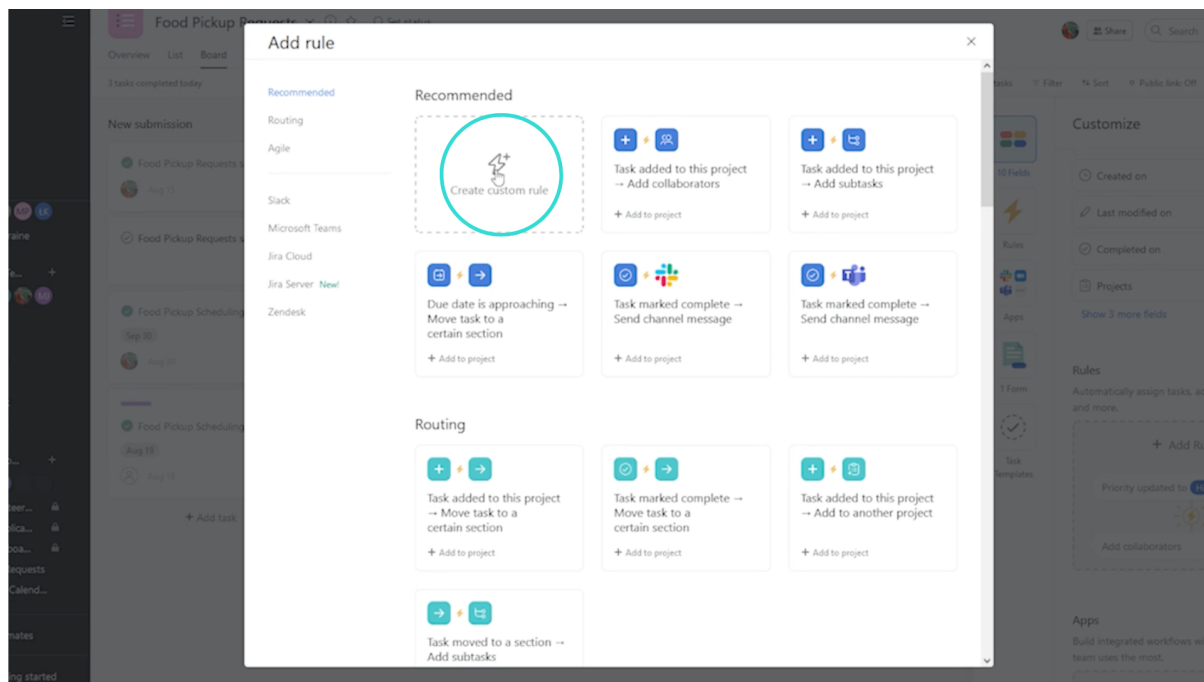
**To set up a new rule to assign form submissions to yourself, click **Customize**.**



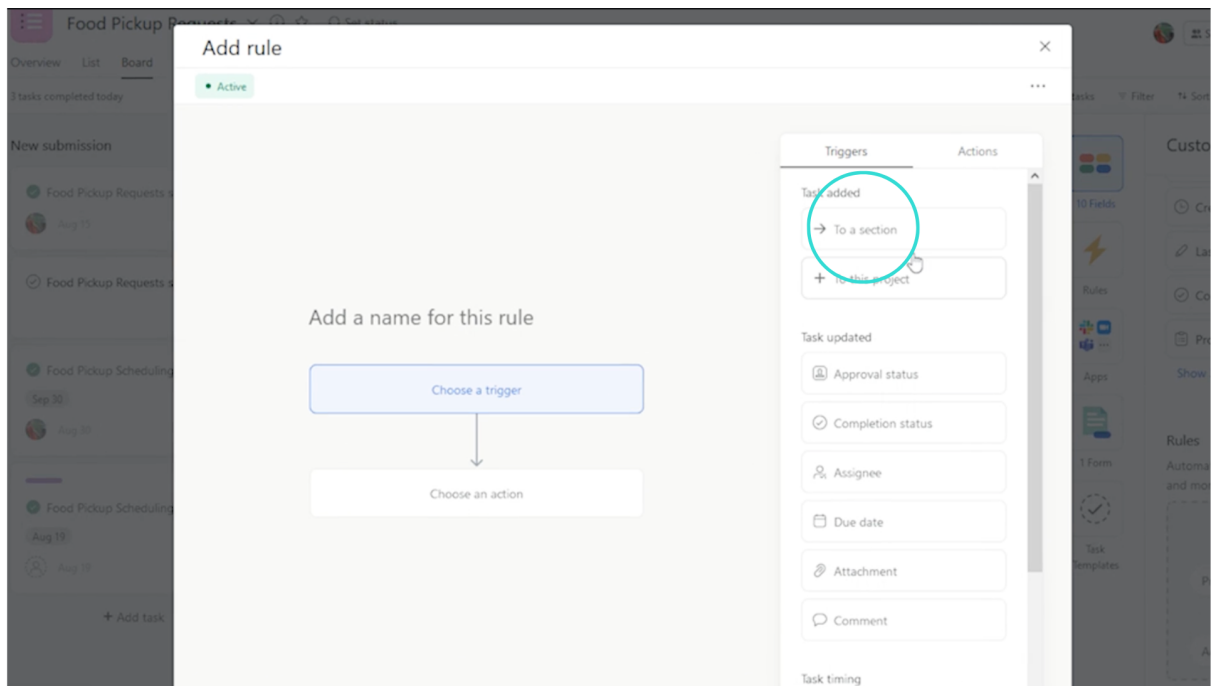
Scroll down to Rules and click **Add Rule**.



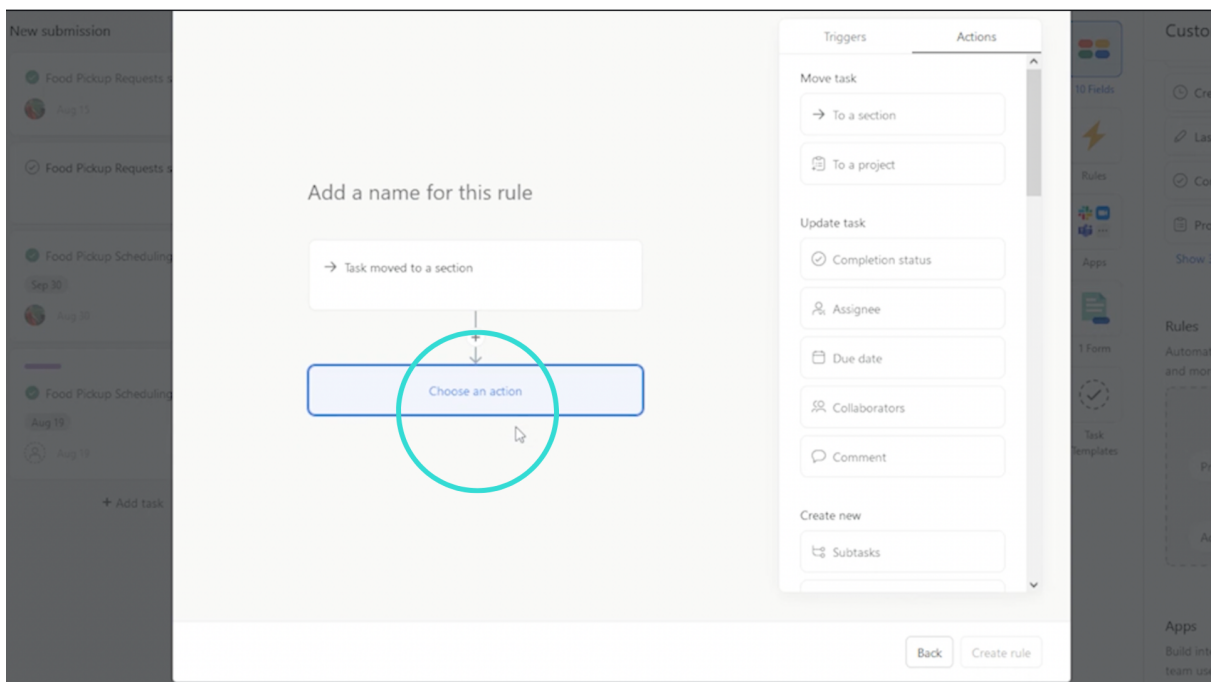
An Add rule pop-up window will appear. Click **Create Custom Rule**.



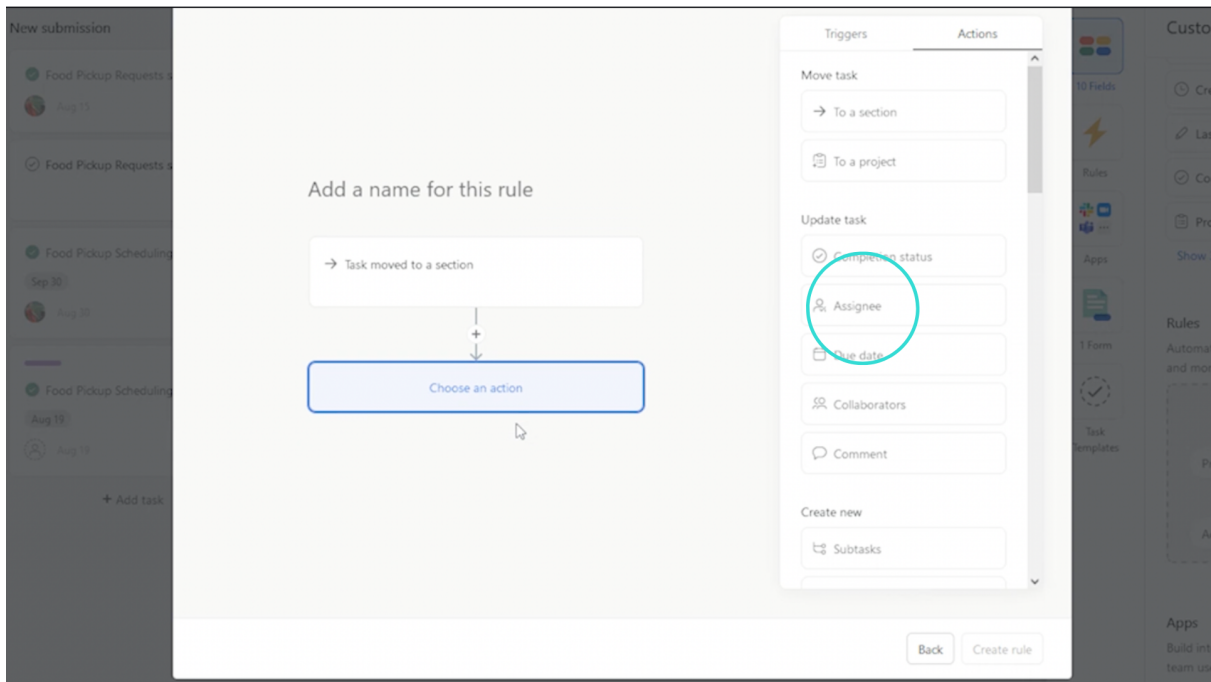
A new Add rule pop-up window appears. Click **To a section** (under the Task added heading).



Now click **Choose an action**.

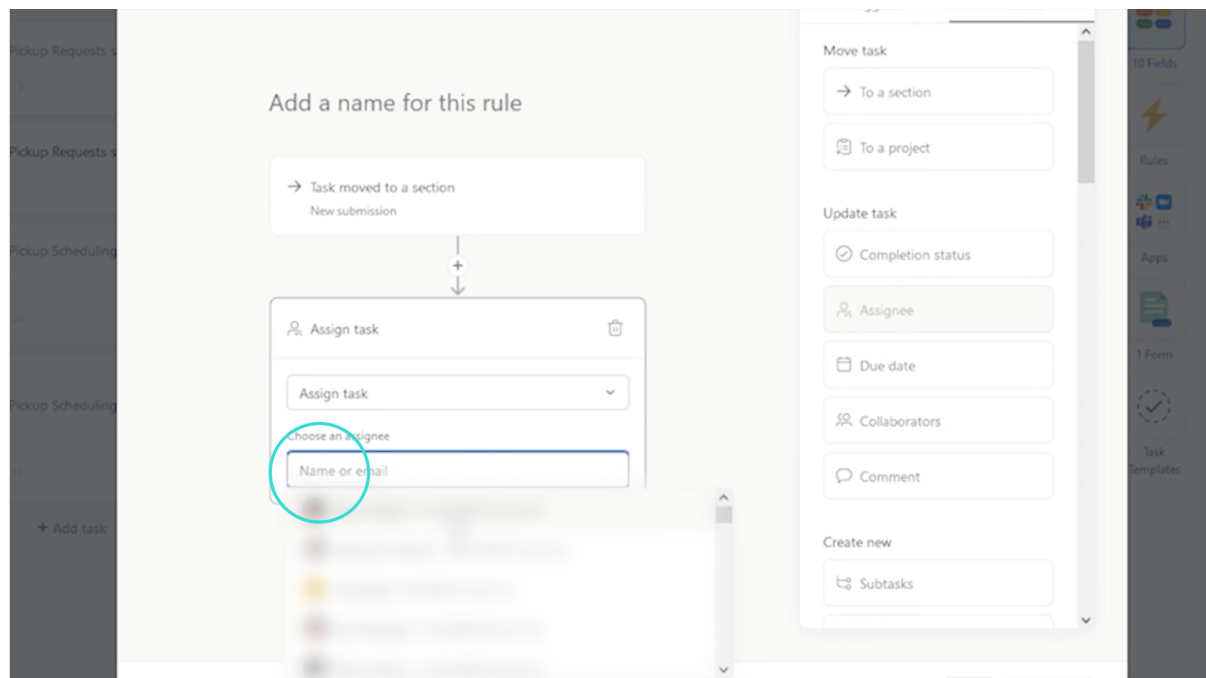


Next click **Assignee**.

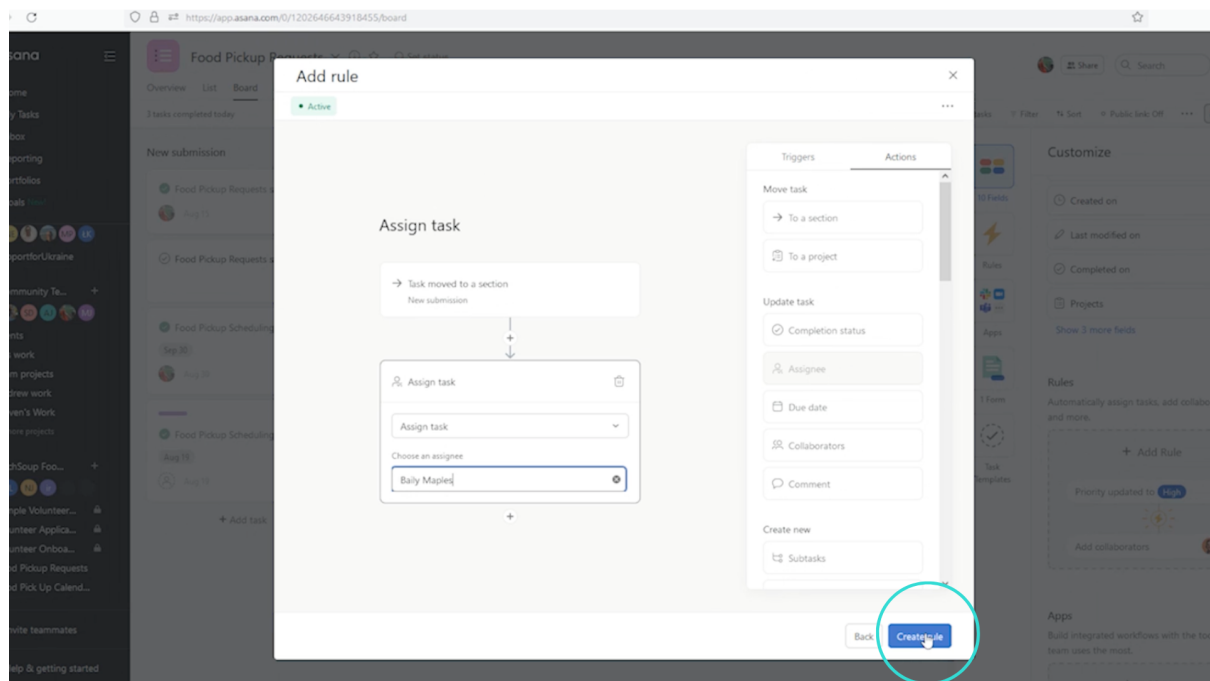


Then assign it to the person within your organization who you want to receive the email notifications when new pickup form submissions are received.

**To assign the notifications to someone**, click **Choose an assignee** and select the person's name from the list.

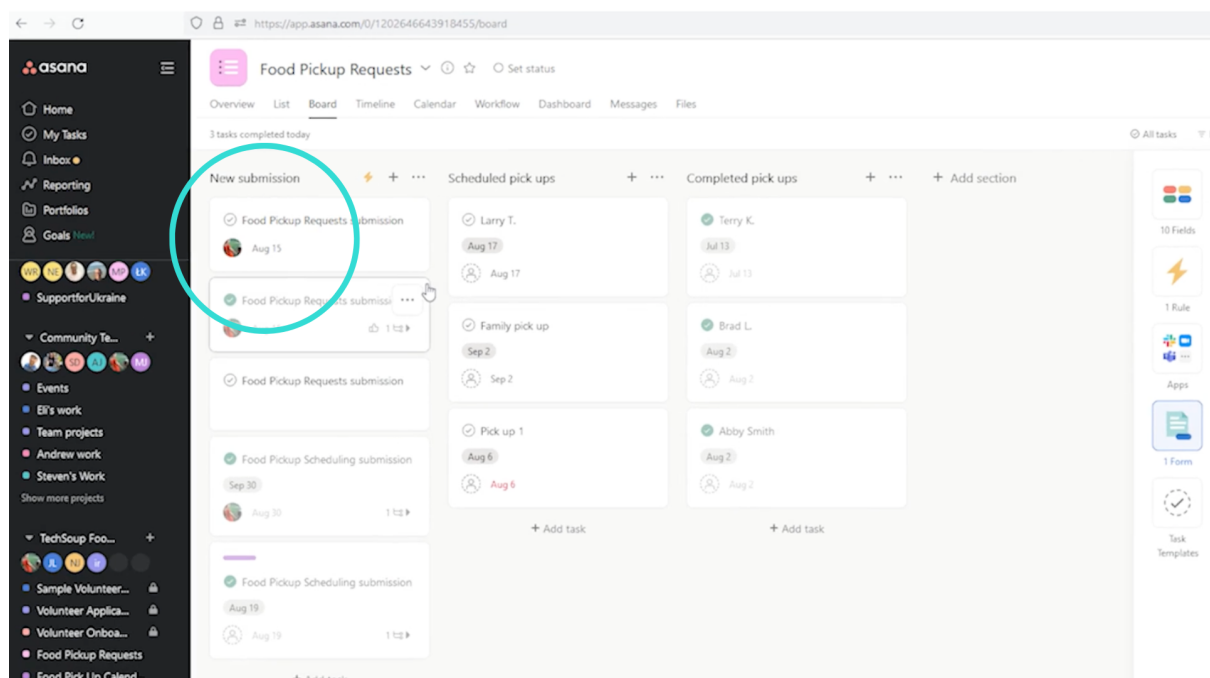


Then click **Create rule**.



Now when a new form submission is received, Asana will automatically send an email notification to the person who was assigned when setting up the rule.

**To view all new submissions in Asana**, open your Food Pickup Requests project and view the submissions under the New submission tab. At a glance, you can see who the notification has been assigned to and what the pickup date is.



## Schedule a New Pickup Request Submission in Asana

There are several options when it comes to scheduling a pickup request in a calendar. The option you choose to use depends on what software you have and what works best for your organization and its employees and volunteers.

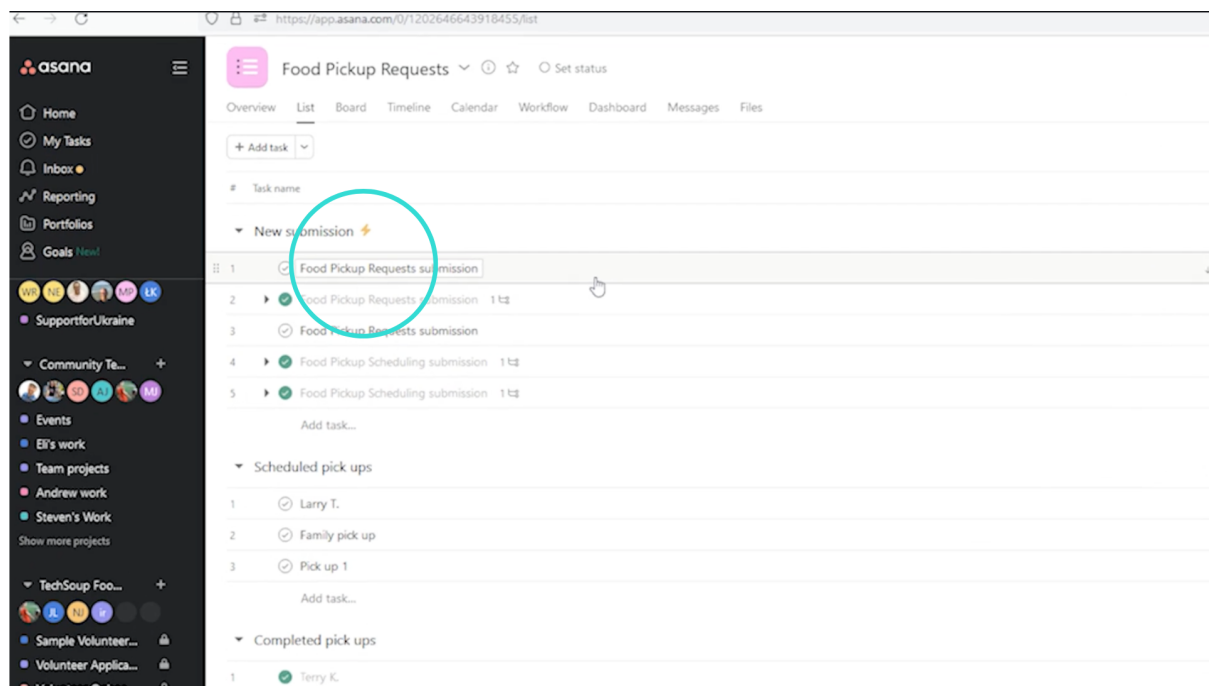
You could opt to either

- Create a food pickup calendar project in Asana
- Sync your Asana calendar with your Google calendar

### Create a Food Pickup Requests Calendar Project in Asana

You will have already created a Food Pickup Requests Calendar project in Asana.

**To assign tasks to that Food Pickup Requests Calendar project,** open your Food Pickup Requests project, go to a Food Pickup Requests submission task that was created, and click on it.



Then click **Add to projects**.



Assignee	Due date	Pick up Date	+
Baily Maples	Aug 15		
Baily Maples	Aug 15		
Baily Maples	Aug 30	Sep 30	
	Aug 19	Aug 19	
	Aug 17	Aug 17	
	Sep 2	Sep 2	
	Aug 6	Aug 6	
	Jul 13	Jul 13	
	Aug 2	Aug 2	
	Aug 2	Aug 2	

### Food Pickup Requests submission

Assignee: Baily Maples Recently assigned

Due date: Aug 15

Projects: Food Pickup Requests New submission

Add to projects

Dependencies: Add dependencies

Pick up Date: —

Description:

**Name:**  
Baily

**Please provide any dietary restrictions.:**  
No dairy

**Please provide food preferences.:**  
N/A

**Please provide your preferred day for pick up.:**  
Aug 15, 2022

**Please provide your preferred confirmation method:**  
Email

Next, click **Food Pickup Requests Calendar project** from the dropdown menu. This assigns your task to your Asana Food Pickup Requests Calendar project.

Assignee	Due date	Pick up Date	+
Baily Maples	Aug 15		
Baily Maples	Aug 15		
Baily Maples	Aug 30	Sep 30	
	Aug 19	Aug 19	
	Aug 17	Aug 17	
	Sep 2	Sep 2	
	Aug 6	Aug 6	
	Jul 13	Jul 13	
	Aug 2	Aug 2	
	Aug 2	Aug 2	

### Food Pickup Requests submission

Assignee: Baily Maples Recently assigned

Due date: Aug 15

Projects: Food Pickup Requests New submission

Foo

- Food Pickup Requests TechSoup Food Bank
- Food Pick Up Calendar TechSoup Food Bank
- Food Security Research Board: Round 2 Research and Impact
- + Create project for 'Foo'

Dependencies:

Pick up Date:

Description:

**Name:**  
Baily

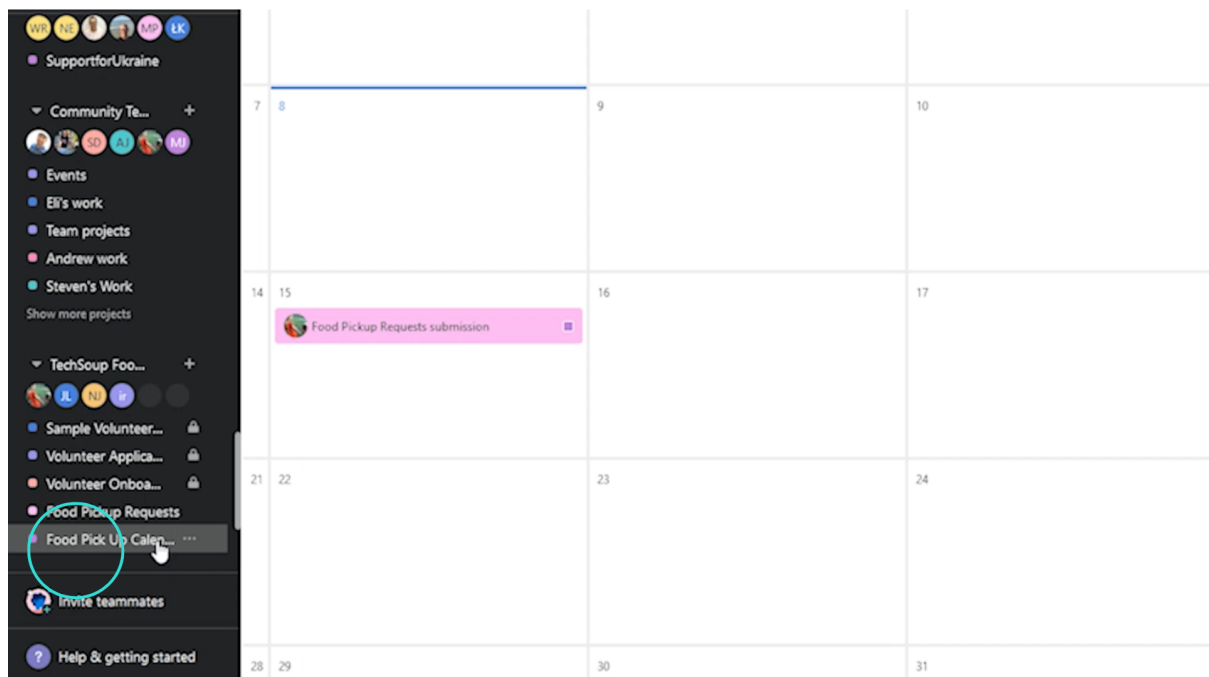
**Please provide any dietary restrictions.:**  
No dairy

**Please provide food preferences.:**  
N/A

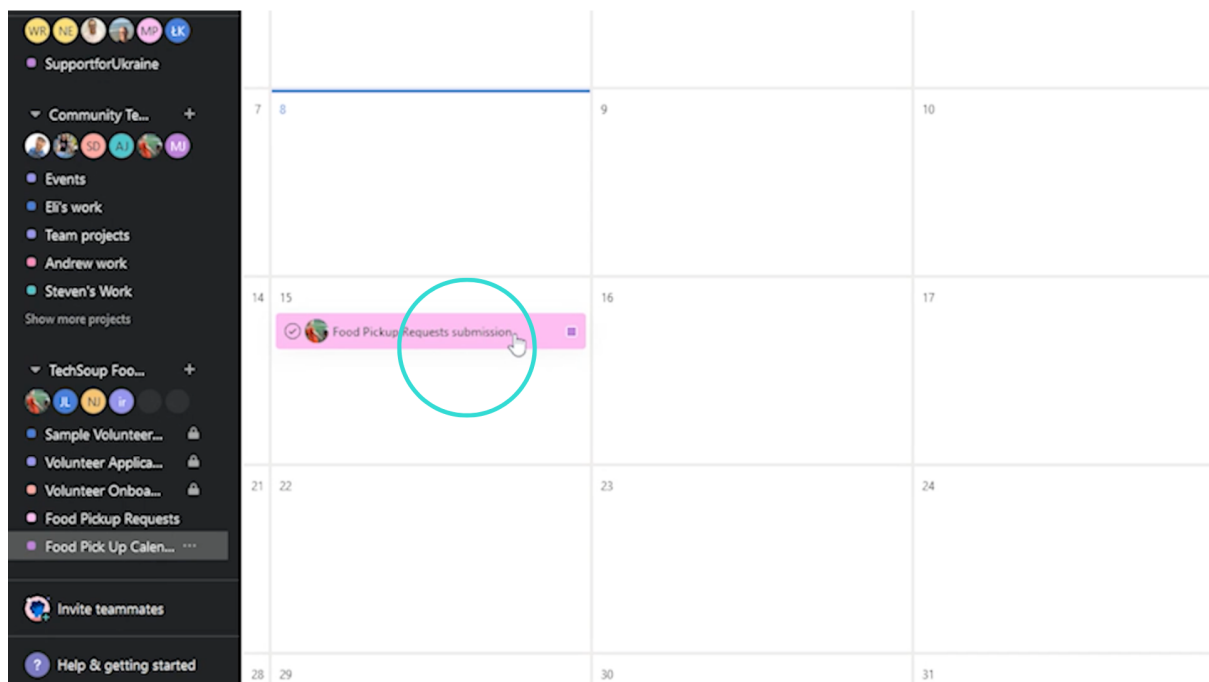
**Please provide your preferred day for pick up.:**  
Aug 15, 2022

**Please provide your preferred confirmation method:**

To view which days and times food pickup appointments occur, open the Food Pickup Requests Calendar project. Your assigned tasks will show there.



To view individual tasks in your Food Pickup Requests Calendar project, click on a task.



In this example, the task is called Food Pickup Requests submission. A new pop-up window for that task opens, and you can review and edit any information here.

Food Pickup Requests submission

Assignee: Baily Maples (Recently assigned)

Due date: Aug 15

Projects: Food Pick Up Calendar, Food Pickup Requests (New submission)

Add to projects

Dependencies: Add dependencies

Pick up Date: —

Description:

Name: Baily

Please provide any dietary restrictions.: No dairy

Please provide food preferences.: N/A

Please provide your preferred day for pick up.: Aug 15, 2022

Please provide your preferred confirmation method:

Ask a question or post an update...

**Tip:** All the information that your client submitted on the Food Pickup Requests form will appear in the task on the calendar. You can edit and delete sensitive or private information from the calendar task, and those edits won't affect or delete the original submission.

**To invite guests to collaborate on this project** (who may be volunteers with your organization), click **+ Collaborators**.

Food Pickup Requests submission

Add to projects

Dependencies: Add dependencies

Pick up Date: —

Description:

Name: Baily

Please provide any dietary restrictions.: No dairy

Please provide food preferences.: N/A

Please provide your preferred day for pick up.: Aug 15, 2022

Please provide your preferred confirmation method: Email

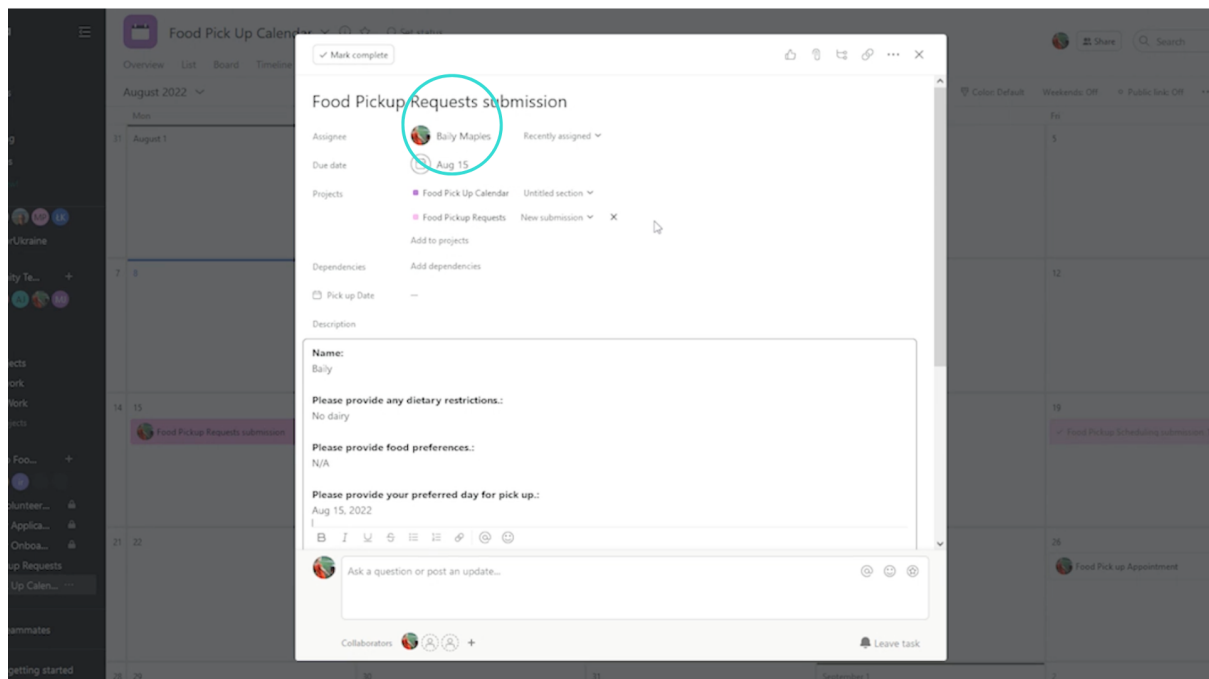
How many folks need food?: 3

This task was submitted through Food Pickup Requests  
[https://form.asana.com/?k=xVpRpp\\_xbNtSt\\_x87o7V4w&id=196829152871427](https://form.asana.com/?k=xVpRpp_xbNtSt_x87o7V4w&id=196829152871427)


Ask a question or post an update...

Collaborators: (Baily Maples) + Collaborators

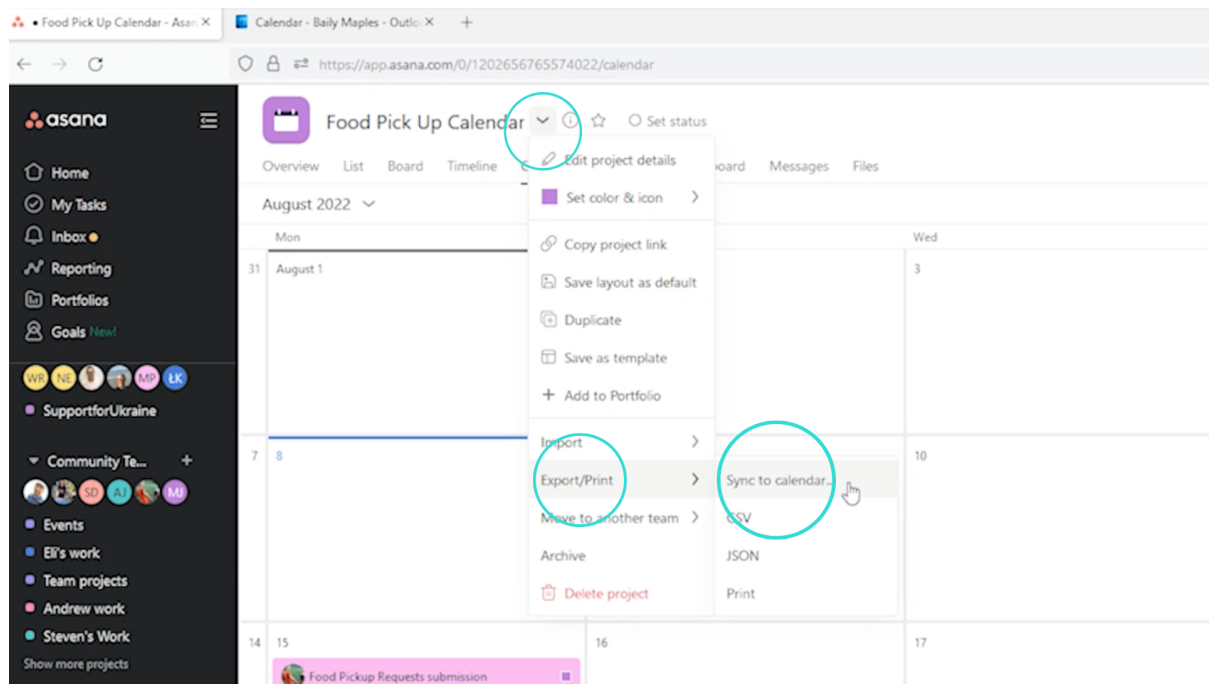
**Tip:** To reassign a task to another staff member, click the assignee's name and select a new assignee.



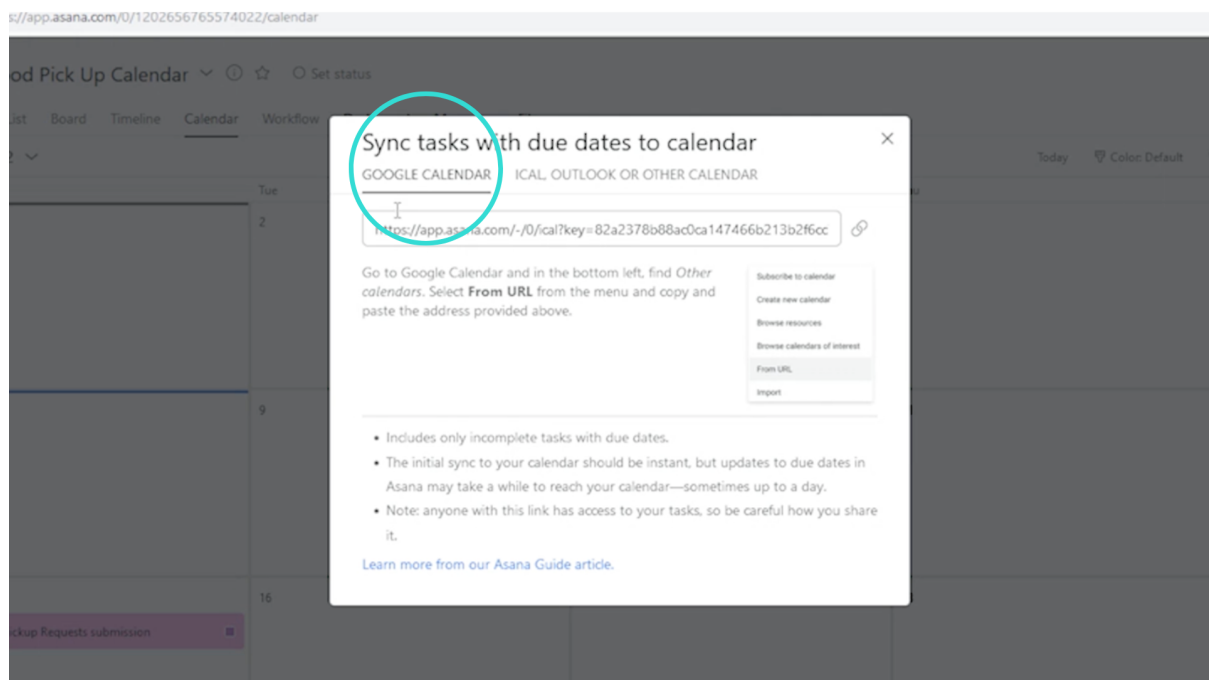
## Sync Your Food Pickup Requests Calendar with Your Google Calendar

To sync your Food Pickup Requests Calendar with your Google calendar, open your Food Pickup Requests Calendar and click the  arrow icon. Select **Export/Print** and then **Sync to calendar**.

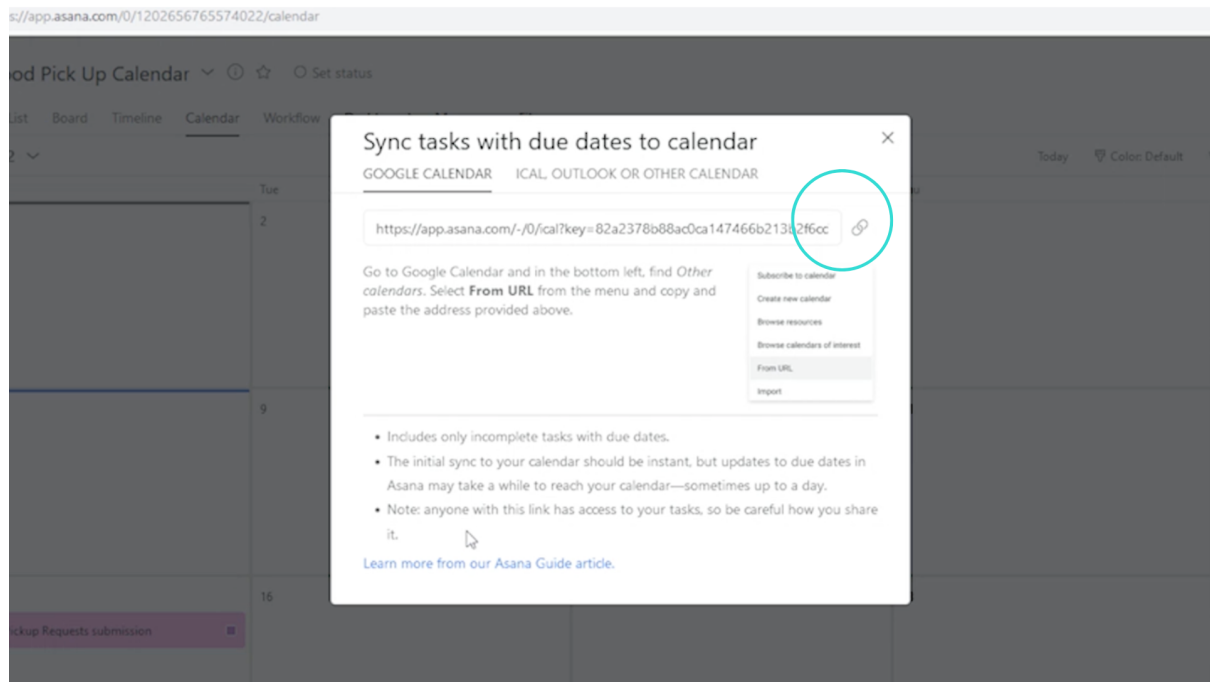
**Tip:** Before you choose to sync Asana tasks with your Google calendar, bear in mind that only incomplete tasks with due dates will be included. The initial sync to your calendar should be instant, but updates to due dates in Asana may take a while to reach your calendar — sometimes up to a day. Also note that anyone with this link has access to your tasks, so be careful how and where you share it. Additionally, any edits you make in your Google calendar will not sync to Asana.



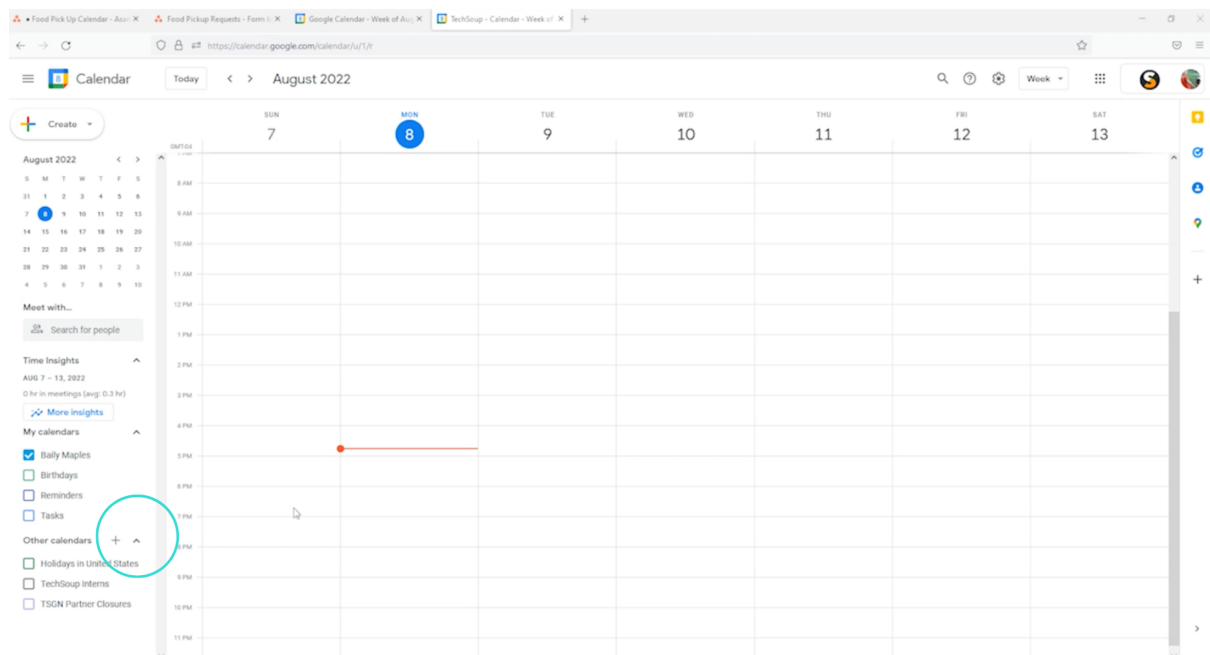
A Sync tasks with due dates to calendar pop-up window appears. Click **GOOGLE CALENDAR**.



To copy the <https://app.asana.com> URL link, click the  **Link** icon.

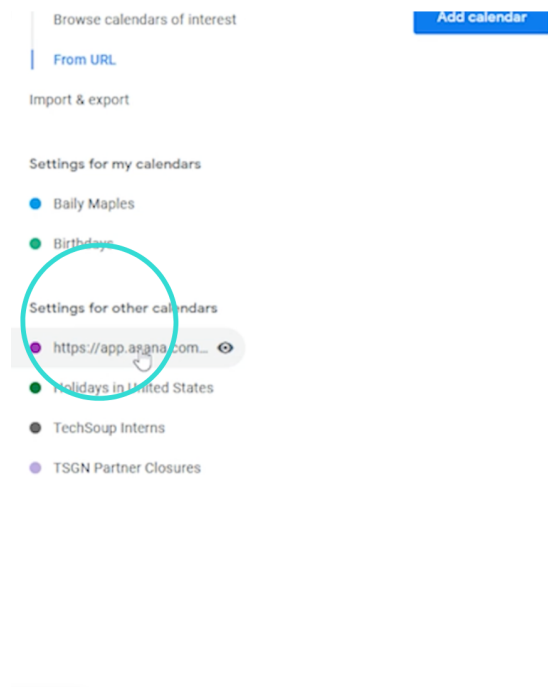


Next, open your Google calendar. **To add your Asana project calendar to your Google calendar, click + next to Other calendars.**

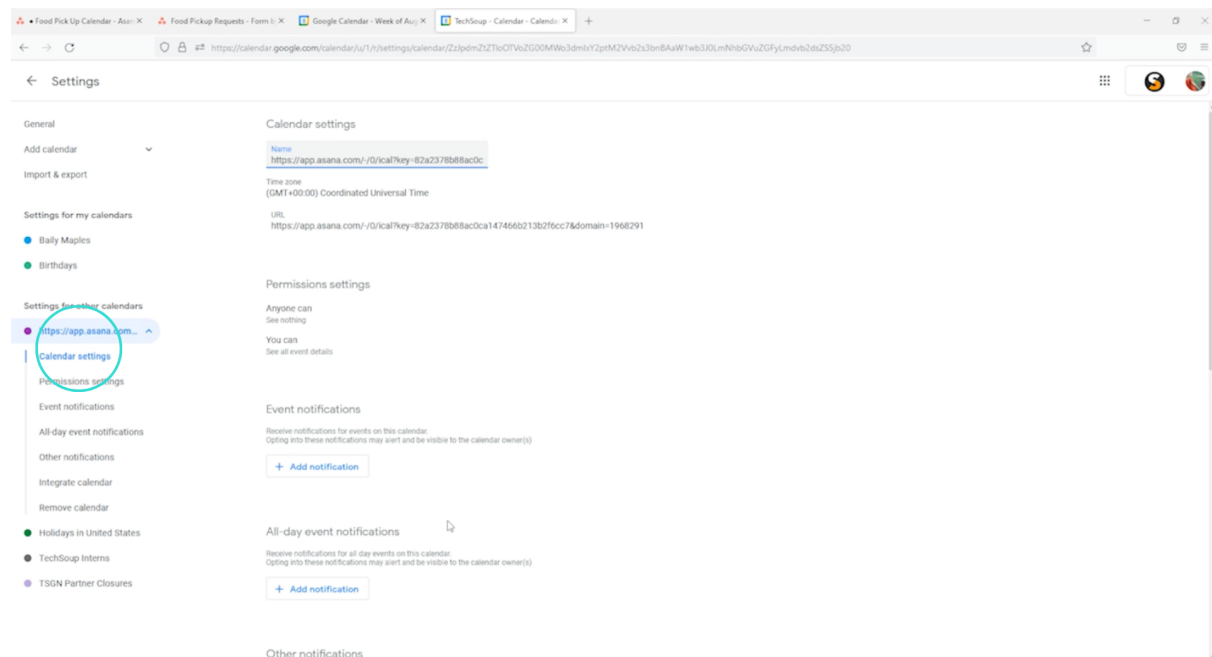



**To finish adding the Asana calendar, Click From URL from the dropdown menu.**



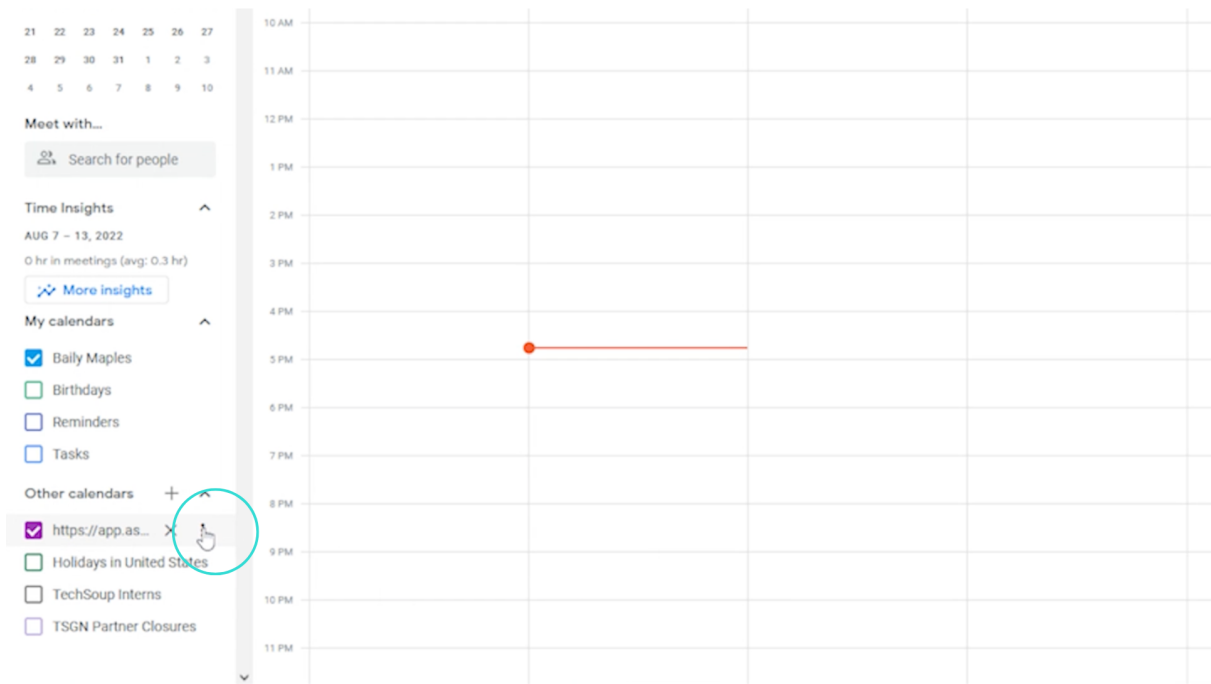


To view calendar settings, click **Calendar settings** from the dropdown menu below your Asana calendar.

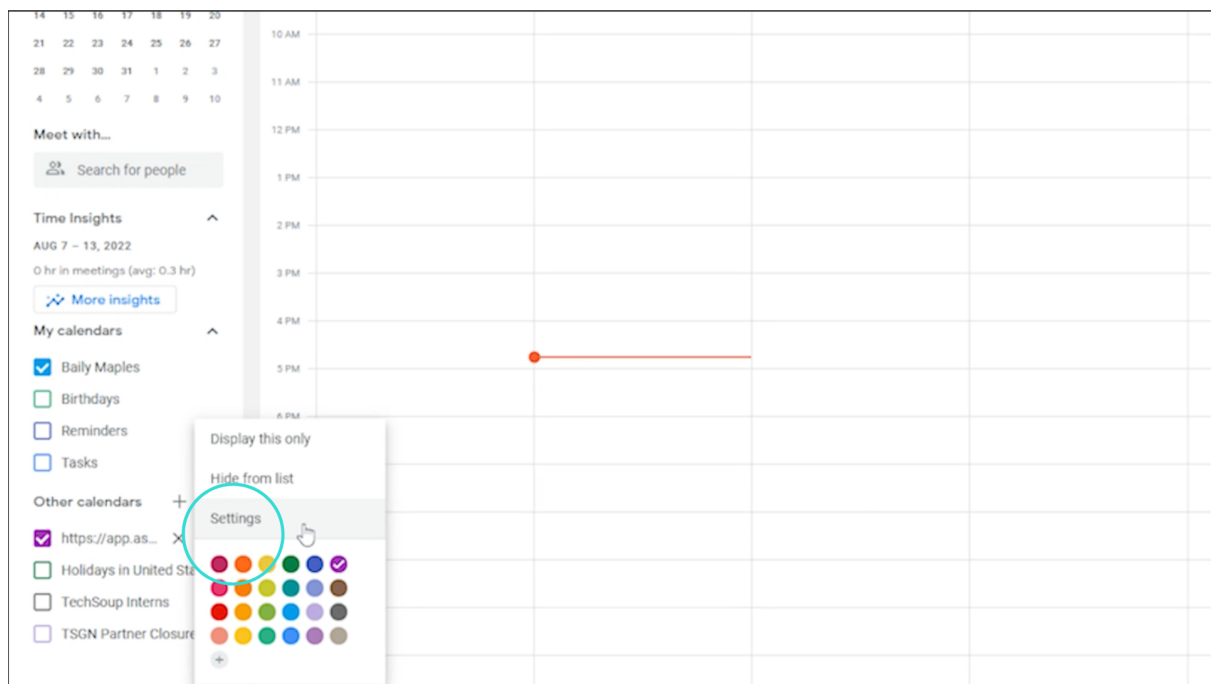


To change the name of the new calendar (which will currently be the URL link that you copied and pasted), click the  icon next to your calendar.

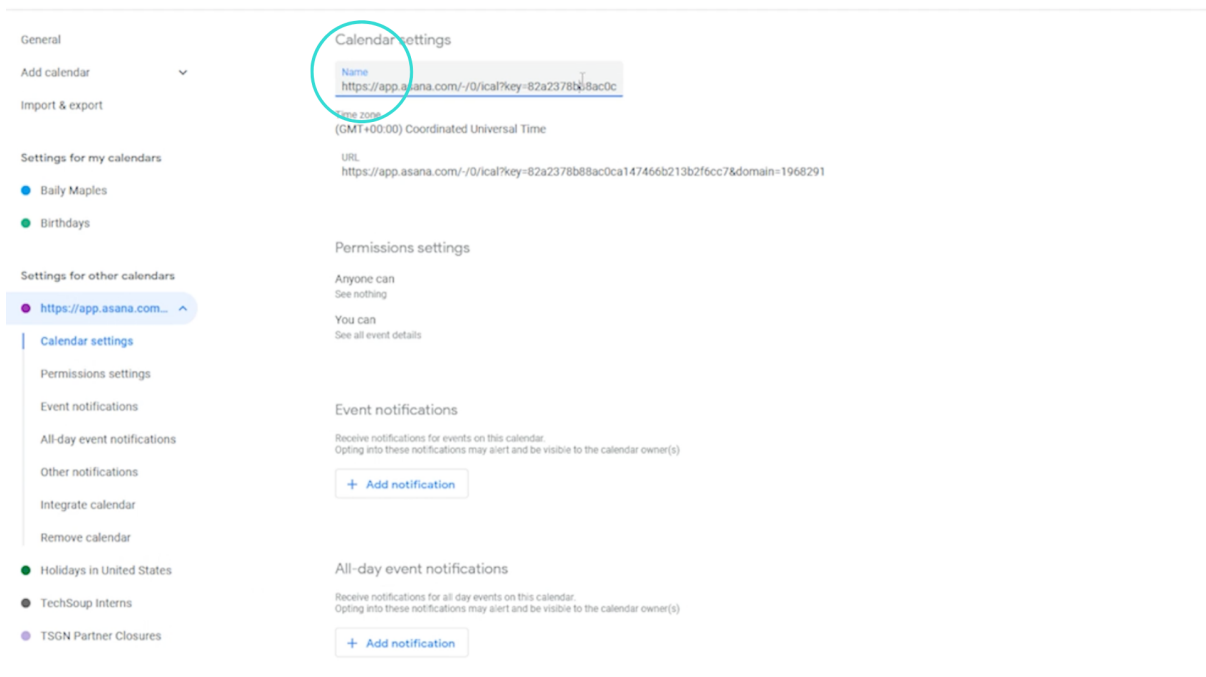




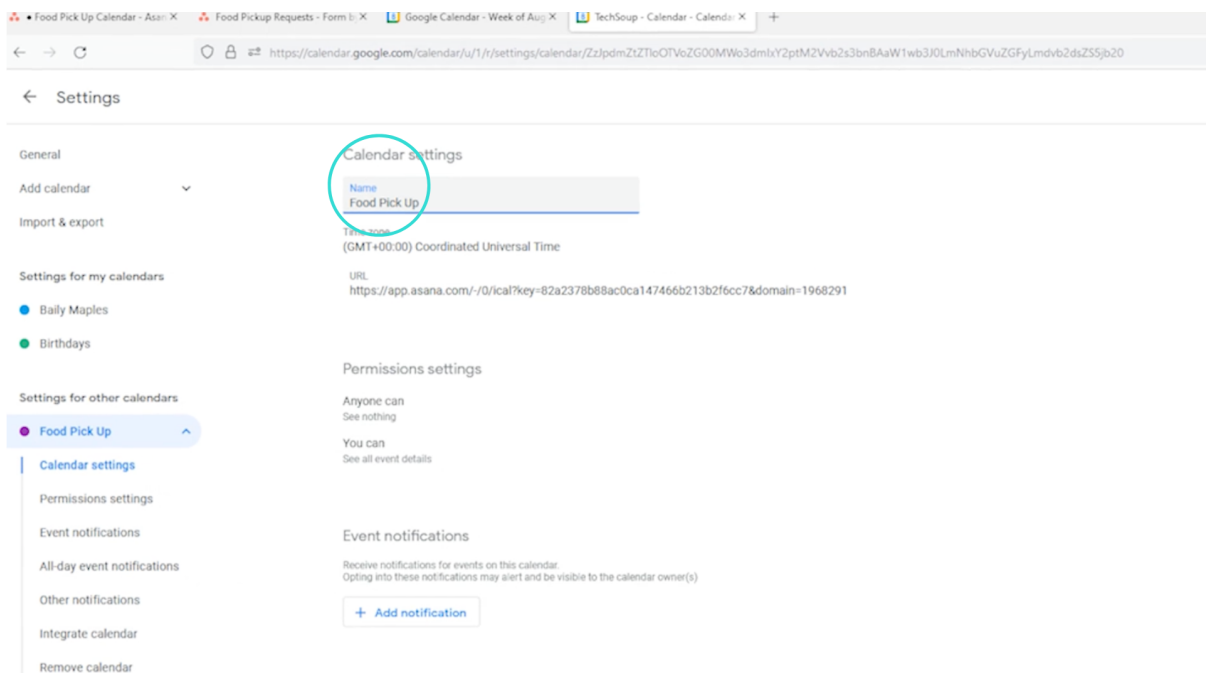
Then select **Settings**.



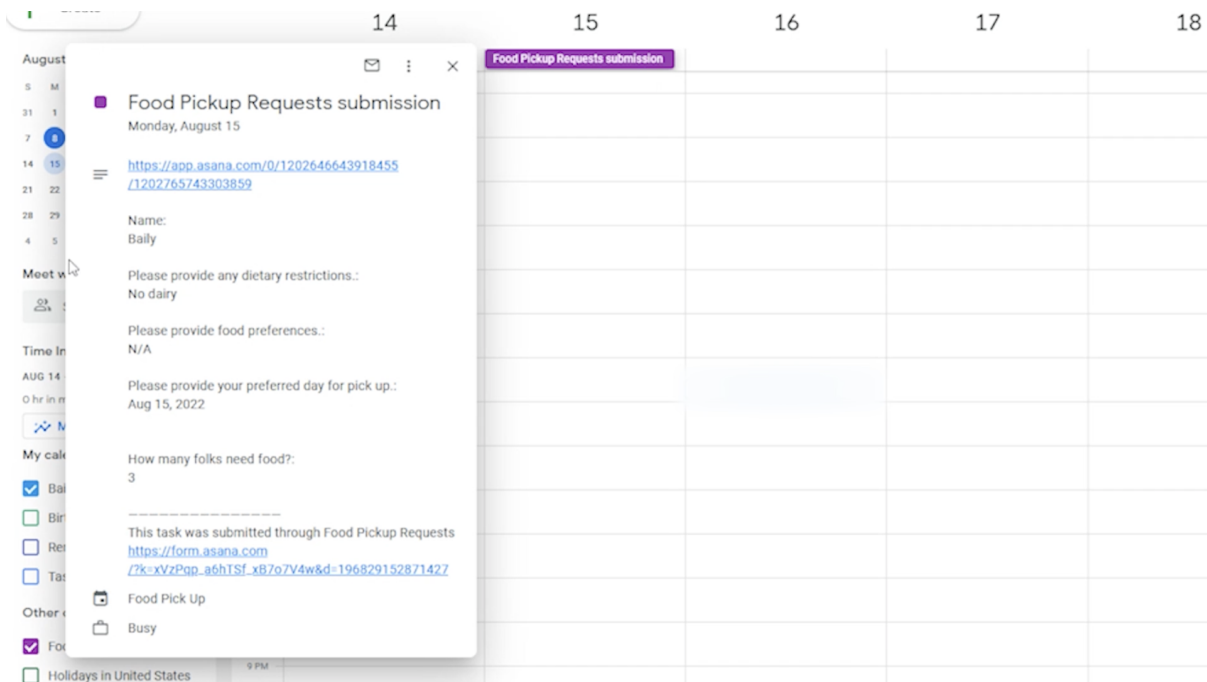
To change the name of the calendar, delete the old name.



**To add a new calendar name**, start typing in the Name box. For this example, we've renamed the calendar Food Pick Up.



You will now be able to view all your Asana calendar tasks in your Google calendar.



## Additional Resources

### Training + Services

- These **TechSoup Courses** are available at no cost to TechSoup Quad members. [Learn more about Quad.](#)
  - [Organizing Your Remote Working Team](#)
  - [Project Management Basics](#)
  - [Microsoft 365 Bootcamp for Nonprofits](#)
- **Need Google Calendar?** A variety of Google products, such as Google Workspace for Nonprofits, are available to TechSoup members. Visit [the program page on TechSoup](#) today to get started.
- **Need Asana?** Asana is available to TechSoup members. Visit [the program page on TechSoup](#) today to get started.

### Content + Community

- **Brand-new to Asana?** We recommend you check out [Getting Started with Asana in 15 minutes or less.](#)
- **Watch this TechSoup video:** [Ask the Expert — Work and Project Management Using Asana.](#)
- **Check out this guide:** [The Nonprofit's Guide to Managing Documents in the Cloud Effectively.](#)