

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.

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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 <u>the program page on</u> <u>TechSoup</u> today to get started.

Need Google Calendar? A variety of Google products, such as Google Workspace for Nonprofits, are available to TechSoup members. Visit <u>the program page on TechSoup</u> today to get started.

Step-by-Step Guide 🧩

<u>Asana</u> 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.

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

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

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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.

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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

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

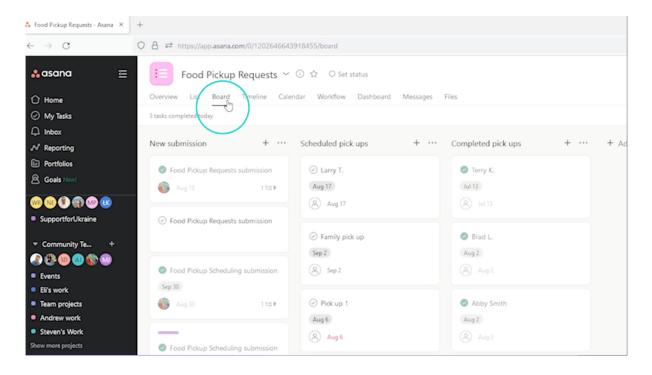
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Review New Form Submissions

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

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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.

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

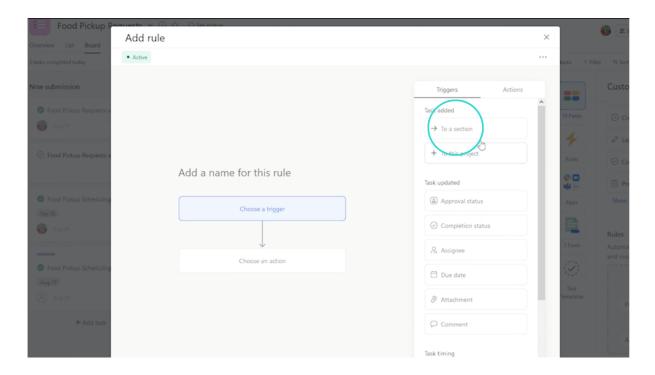
Scroll down to Rules and click Add Rule.

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

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



Now click Choose an action.

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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.

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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.

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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.

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Then click Add to projects.

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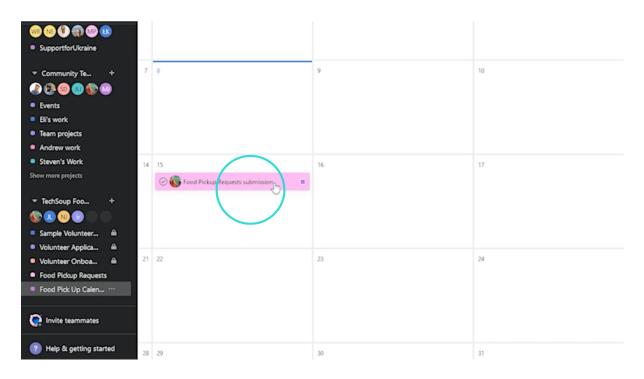
Next, click **Food Pickup Requests Calendar project** from the dropdown menu. This assigns your task to your Asana Food Pickup Requests Calendar project.

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

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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.

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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**.

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	Please provide your preferred day for pick up.: Aug 15, 2022 Please provide your preferred confirmation method:		
14 15 Food Pickup Requests submission	Email	_	
	How many folks need food?: 3 This task was submitted through Food Pickup Requests		
21 22	https://orm.asana.com//k=x4zhgp_a6h151_x812o7V4w8td=196829152871427 B I L ⊕ III ⊕ IIII ⊕ IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII		26
	Ask a question or post an update	© © ®	Food Pick up Appointment
71 21	Collaborators 🚳 🛞 +	Leave task	

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

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	Overview Li		✓ Mark complete			6 9 5 0 X		C Martin
6	August 2022		Food Picku	p Requests submission			Color Default	
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5			Due date	(C) Aug 15				
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up Requests			Ask a quest	tion or post an update		0 0 0		Food Pick up Appointment
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getting started	28 29		30	31		September 1		

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**.

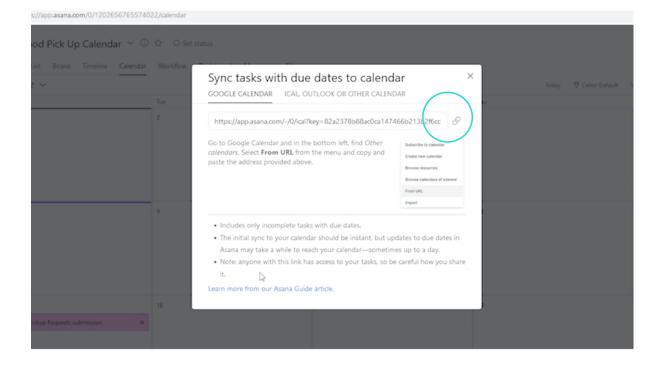
Tip: Before you choose to sync Asana tasks with your Google calendar, bear in mind that only incomplete tasks with due dates will be included. The initial sync to your calendar should be instant, but updates to due dates in Asana may take a while to reach your calendar — sometimes up to a day. Also note 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.

Food Pick Up Calendar - Asan X	Calendar - Baily N	Maples - Outloc × +					
$\leftarrow \rightarrow $ C	O A ≈ https://app.asana.com/0/1202656765574022/calendar						
🔥 asana 🛛 🖻	Fo	od Pick Up Calendar 🛩					
🛈 Home	Overview l	ist Board Timeline	² Edit project details	oard Messages Files			
Ø My Tasks	August 2022	2 ~	Set color & icon				
♀ Inbox●	Mon	6	Copy project link		Wed		
N Reporting	31 August 1		Save layout as default		3		
Di Portfolios							
Goals New!		0	Duplicate				
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SupportforUkraine				\frown			
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@ (B (D		Б	xport/Print >	Sync to calendar			
Events		2	eve to another team >	XSV U			
Eli's work		A	rchive	JSON			
Team projects		-	Delete project	Print			
Andrew work			j Delete project	Print			
Steven's Work	14 15		16		17		
Show more projects	Kood P	ickup Requests submission					

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

s://app. asana.com /0/12026567655740	2/calendar			
od Pick Up Calendar 🗡 🛈	습 O Set status			
list Board Timeline Calendar	Tue 2 GOOGLE C/ I Natos://api Go to Goog calendars. S	ALENDAR ICAL, OUTLOOK OR OTHER CALE Dop as the com/-/0/ical?key=82a2378b88ac0ca14 gle Calendar and in the bottom left, find Other Select From URL from the menu and copy and ddress provided above.	NDAR	Today 🦁 Color: Default
	• The initi Asana m • Note: an it.	s only incomplete tasks with due dates. ial sync to your calendar should be instant, but nay take a while to reach your calendar—somet nyone with this link has access to your tasks, so from our Asana Guide article.	imes up to a day.	
ckup Requests submission	16			

To copy the https://app.asana.com URL link, click the ^O Link icon.



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

> C (A == http:	s://calendar.google.com/calendar/u	/1/r						\Box
🛛 🗾 Calendar	Today	< > August 2022					Q (?) 🔅 1	Neek -	9
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ugust 2022 < > *	GMT04		-						^
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9 10 11 12 13	9 AM								
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29 30 31 1 2 3 5 6 7 8 9 10	11 AM								
et with	12 PM								_
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e Insights	2 PM								
7 – 13, 2022 in meetings (avg: 0.3 hr)									
More insights	3 PM								
calendars ^	4 PM								
Baily Maples	SPM	•							
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Tasks	7.PM	4							
ner calendars + 🔺	1 PM								
Holidays in United States									
TechSoup Interns	9 PM								
TSGN Partner Closures	10 PM								
	11.04								

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

28 29 30 31 1 2 3	11 AM -
4 5 6 7 8 9 10	1 / 700
Meet with	12 PM
A Search for people	1PM
Time Insights	2 PM
AUG 7 - 13, 2022	
0 hr in meetings (avg: 0.3 hr)	3 PM
📯 More insights	4 PM -
My calendars	
🛃 Baily Maples	5 PM
Birthdays	
Reminders	6 PM
Tasks	7 PM -
Other calendars Subscribe to	o calendar
Holidays in Unite Create new	calendar
TechSoup Intern	
TSGN Partner Cl	endars of interest
From URL	
Impert	

A new From URL pop-up appears. Paste the URL into the **URL of calendar box**. Then click **Add calendar.**

👶 🔹 Food Pick Up Calendar - Asan X	🔥 Food Pickup Requests - Form b; X 🚯 Google Calendar - Week of Aug X 🚺 TechSoup - Calendar - Add cale: X +
$\leftarrow \ \rightarrow \ \mathbf{C}$	○ A === https://calendar.google.com/calendar/u/1/r/settings/addbyurl
← Settings	
General	From URL
Add calendar	URL of calexidar :0ca14746bb213b2f6cc7&domain=196829152871427
Subscribe to calendar	Make the calendar publicly accessible
Create new calendar	You can add - extendar using the iCal format by its address.
Browse calendars of interest	Add calendar
From URL	
Import & export	
Settings for my calendars	
 Baily Maples 	
 Birthdays 	
Settings for other calendars	
 Holidays in United States 	

Now your Asana calendar has been synced with your Google calendar.

To view your Food Pickup calendar in your Google calendar, click the https://app.asana.com calendar name under **Settings for other calendars**.

Browse calendars of interest	Add calendar
From URL	
Import & export	
Settings for my calendars	
 Baily Maples 	
Birtbdays	
Settings for other calendars	
https://app.agana.com	
Nolidays in United States	
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TSGN Partner Closures	

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

🔥 • Food Pick Up Calendar - Asan X 💦 Food Pickup Requests	- Form I: X 🚺 Google Calendar - Week of Aug X 🚺 TechSoup - Calendar - Calendar X +		- 0	×
← → C O A ≠ https://ca	alendar google.com/calendar/u/1/r/settings/calendar/ZzIpdmZtZTioOTVoZG00MWo3dmis/2ptM2VvbZs3bnBAaW1wb310LmNhbGVuZGFyLmdvb2dsZSSjb20	☆	(. ≡
← Settings			9	6
General	Calendar settings			Í
Add calendar 🗸	Name https://app.asana.com/-/0/ical%ey-82a2378b88ac0c			
Import & export	Time zone (CMT+00.00) Coordinated Universal Time			
Settings for my calendars	URL https://app.asana.com/-/U/ical%ey=82a2378b88acOca147466b213b2f6cc7&domain=1968291			
 Baily Maples 	тарла паррияна на силта у на полт тау чила кал и инично на чели на			
 Birthdays 				
	Permissions settings			
Settings for other calendars ttps://app.asana.opm	Anyone can See nothing			
Calendar settings	You Can See all event details			
Permissions settings				
Event notifications	Event notifications			
All-day event notifications	Receive notifications for events on this calendar. Opting into these notifications may alert and be visible to the calendar owner(s)			
Other notifications	+ Add notification			
integrate calendar				
Remove calendar				
Holidays in United States	All-day event notifications			
TechSoup Interns	Receive notifications for all day events on this calendar. Opting into these notifications may aliert and be visible to the calendar owner(s)			
TSGN Partner Closures	+ Add notification			
	Other notifications			

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.

	10 AM		
21 22 23 24 25 26 27	10 AM		
28 29 30 31 1 2 3	11 AM		
4 5 6 7 8 9 10			
Meet with	12 PM -		
Search for people	1 PM		
Time Insights			
-	2 PM		
AUG 7 – 13, 2022 O hr in meetings (avg: 0.3 hr)			
More insights	3 PM		
	4 PM		
My calendars			
🛃 Baily Maples	S PM		
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Birthdays	5 PM		
Birthdays Reminders	6 PM		
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Birthdays Reminders Tasks Other calendars	6 PM		
Birthdays Reminders Tasks Other calendars Mttps://app.as	6 PM		
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 Birthdays Reminders Tasks Other calendars https://app.as_ Holidays in United States TechSoup Interns 	6 PM 7 PM 8 PM		
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 Birthdays Reminders Tasks Other calendars https://app.as_ Holidays in United States TechSoup Interns 	6 PM 7 PM 8 PM 9 PM 10 PM 11 PM		

Then select Settings.

14 15 16 17 18 19 20	
21 22 23 24 25 26 27	10 AM -
28 29 30 31 1 2 3	
4 5 6 7 8 9 10	11 AM -
4 5 6 7 8 7 10	
Meet with	12 PM -
Search for people	
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0 hr in meetings (avg: 0.3 hr)	3 PM -
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TechSoup Interns	
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To change the name of the calendar, delete the old name.

General	Calendar cettings
Add calendar 🗸 🗸	Name https://app.ag/ana.com/-/0//ical?key-82a2378bJ8ac0c
Import & export	(GMT+00.00) Coordinated Universal Time
Settings for my calendars	URL https://app.asana.com/-/0//ical?key=82a2378b88ac0ca147466b213b2f6cc7&domain=1968291
 Baily Maples 	
 Birthdays 	
	Permissions settings
Settings for other calendars	Anyone can See nothing
https://app.asana.com ^	You can
Calendar settings	See all event details
Permissions settings	
Event notifications	Event notifications
All-day event notifications	Receive notifications for events on this calendar. Opting into these notifications may alert and be visible to the calendar owner(s)
Other notifications	+ Add notification
Integrate calendar	
Remove calendar	
 Holidays in United States 	All-day event notifications
TechSoup Interns	Receive notifications for all day events on this calendar. Opting into these notifications may alert and be visible to the calendar owner(s)
TSGN Partner Closures	+ Add notification

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

👶 • Food Pick Up Calendar - Asan X 💦 👶 Food Pickup	Requests - Form bij X 🔛 Google Calendar - Week of Aug X 🔛 TechSoup - Calendar - Calendar X +
$\leftrightarrow \rightarrow $ C O A = h	ttps://calendar.google.com/calendar/u/1/r/settings/calendar/ZzJpdmZtZTioOTVoZG00MWo3dmb;Y2ptM2Vvb2s3bnBAaW1wb3J0LmNhbGVuZGFyLmdvb2dsZ55jb20
← Settings	
General	Calendar settings
Add calendar 🗸	Name Food Pick Up
Import & export	Timeson (GMT+00:00) Coordinated Universal Time
Settings for my calendars	URL https://app.asana.com/-/0/ical?key=82a2378b88ac0ca147466b213b2f6cc78domain=1968291
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Birthdays	
	Permissions settings
Settings for other calendars	Anyone can See nothing
Food Pick Up	You can
Calendar settings	See all event details
Permissions settings	
Event notifications	Event notifications
All-day event notifications	Receive notifications for events on this calendar. Opting into these notifications may alert and be visible to the calendar owner(s)
Other notifications	+ Add notification
Integrate calendar	
Remove calendar	

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

	14		15	16	17	18
August	⊠ :	×	Food Pickup Requests submission			
S M 31 1 7	Food Pickup Requests submission Monday, August 15	1				
14 15 21 22 =	https://app.asana.com/0/1202646643918455 /1202765743303859	-				
28 29 4 5	Name: Baily					
Meet w	Please provide any dietary restrictions.: No dairy					
Time In	Please provide food preferences.: N/A					
AUG 14 Ohr in m	Please provide your preferred day for pick up.: Aug 15, 2022					
My cale	How many folks need food?: 3					
Bir Rei	This task was submitted through Food Pickup Reque					
Other (<u>/?k=xVzPqp_a6hTSf_x87o7V4w&d=1968291528714</u> Food Pick Up					
For	Busy United States 9 PM					

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 <u>the program page on</u> <u>TechSoup</u> today to get started.
- **Need Asana?** Asana is available to TechSoup members. Visit <u>the program page on</u> <u>TechSoup</u> today to get started.

Content + Community 🌍

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