

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

Tech Recipe: Using Asana and Outlook 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 Microsoft Outlook 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 wanting to learn how to use Asana to create an online scheduling form to help coordinate food pickups for your 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 Microsoft Outlook

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

Need Microsoft 365? Licenses 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

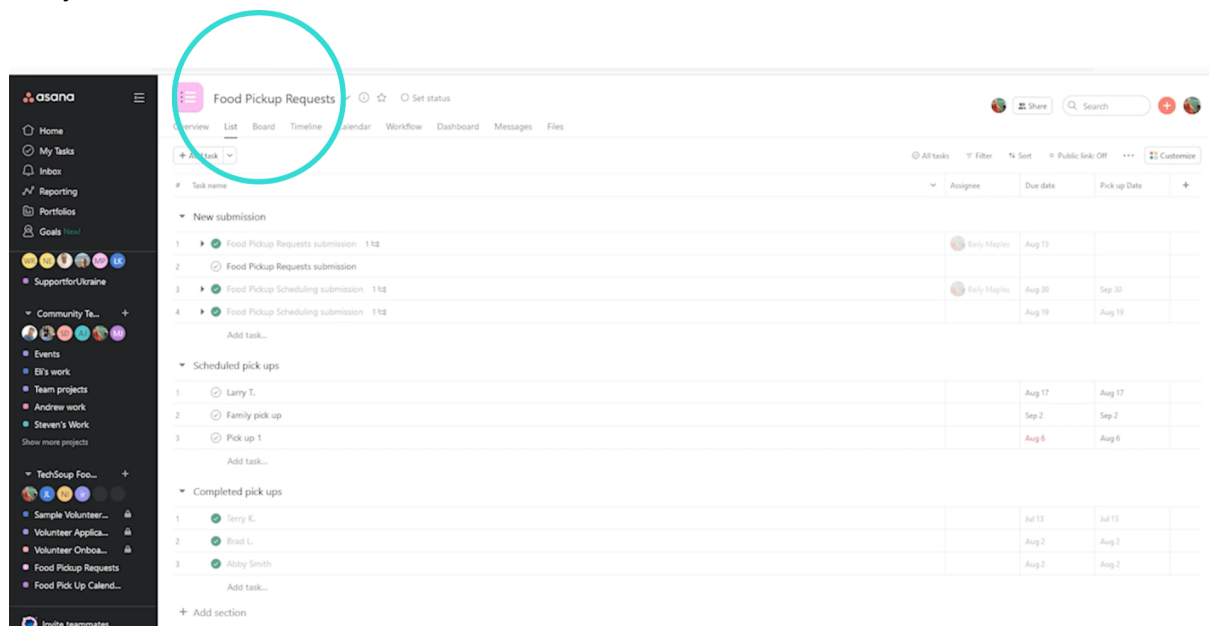
To use Microsoft Outlook you'll need a Microsoft Outlook account, which is part of Microsoft 365.

Create a New Intake Scheduling Form

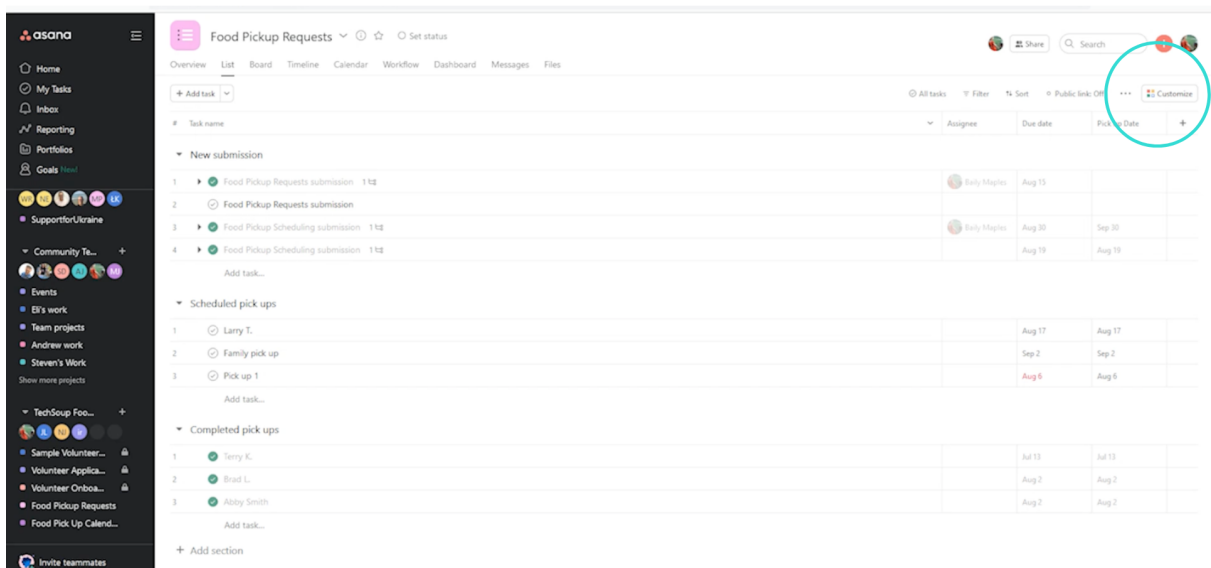
The first step in coordinating client food pickups, is to create a new form in Asana that lets you capture information from clients (such as dietary preferences) and lets clients then select a date when they would like to pickup their food from your food bank or pantry.

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.

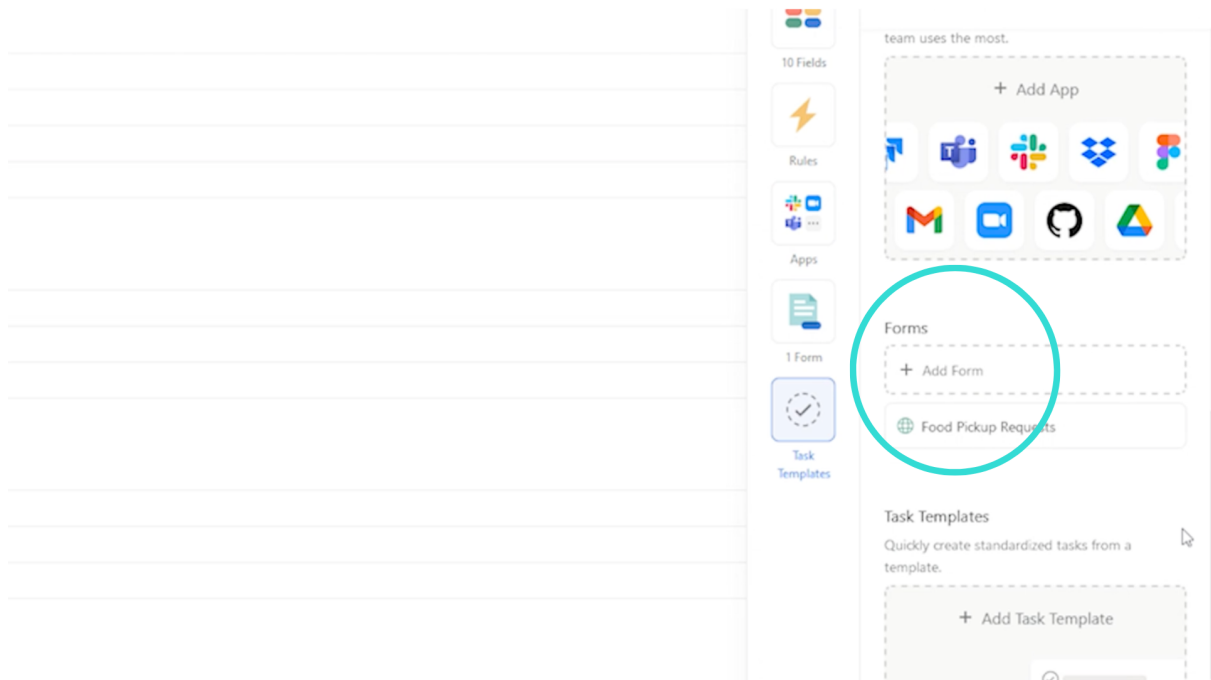
To create a new form in Asana, first ensure you're in the Food Pickup Requests project that you created.



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

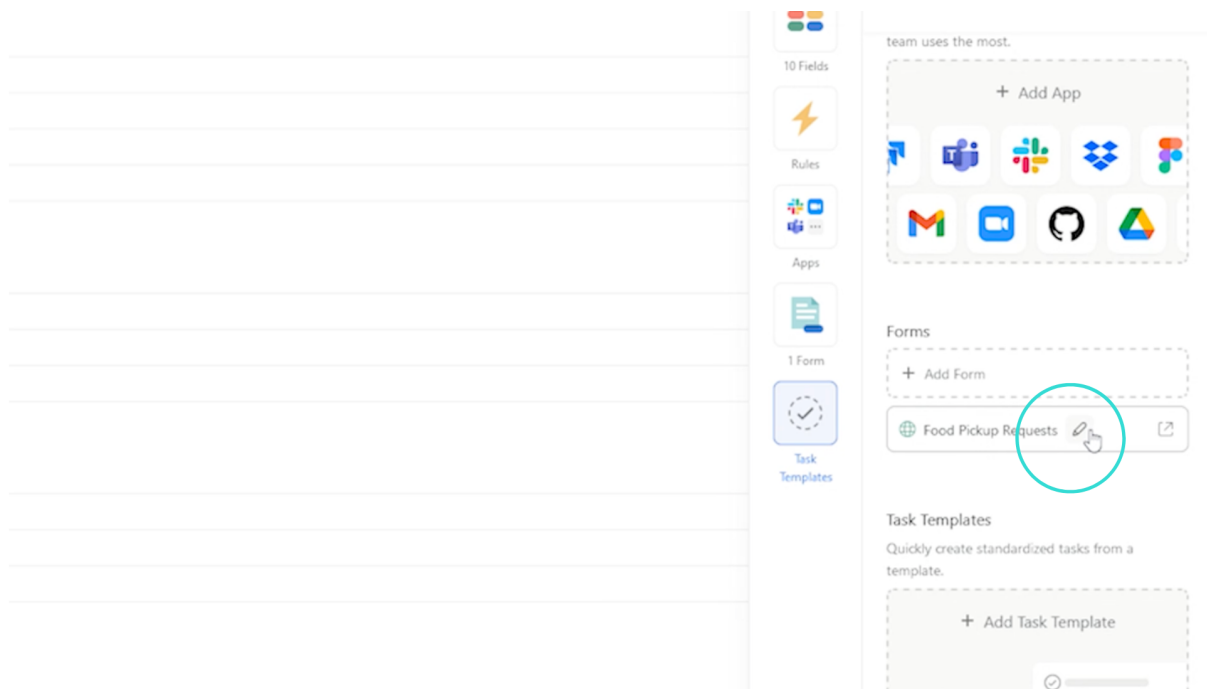


Scroll down to **Forms**. Click **Add Form** to create a new form within this project.



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.

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 then select **Due date**.

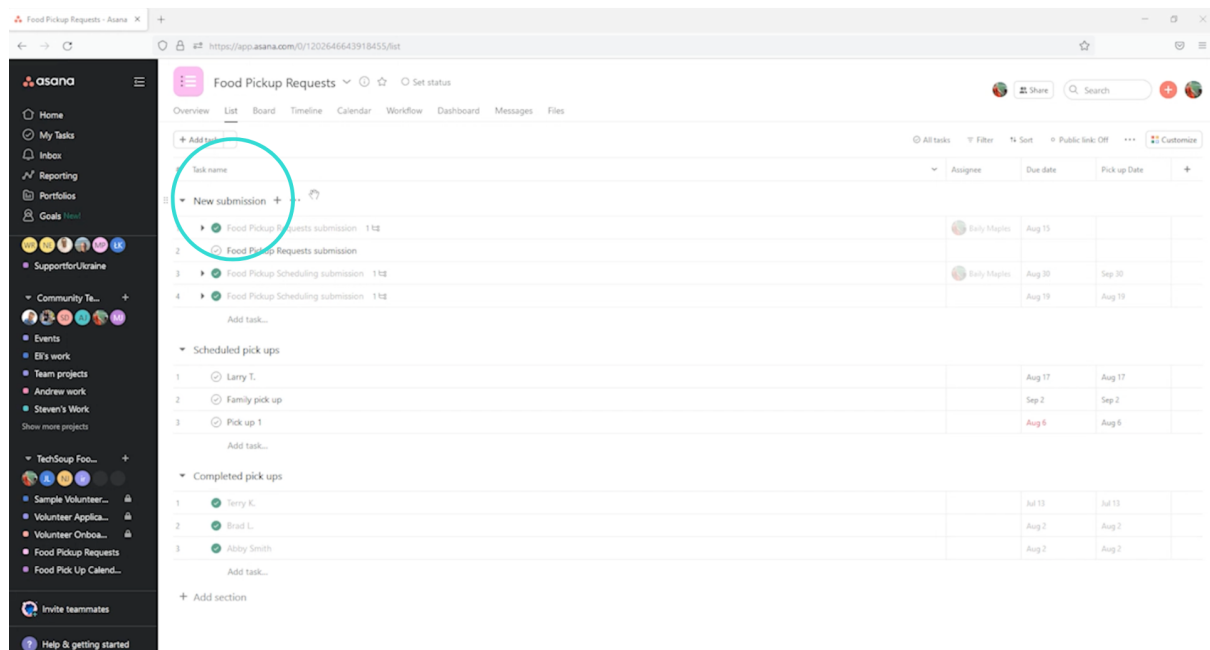
This screenshot shows the 'Edit form' interface in Asana. The central form contains several questions: 'Please provide any dietary restrictions.*', 'Please provide food preferences.', 'Please provide your preferred day for pick up.' (a Date field), 'Please provide your preferred confirmation method.*' (with radio buttons for Phone call, Text message, and Email), and 'Please provide phone number/email address.*'. The 'Date' field is highlighted with a red circle, and a dropdown menu is open, showing 'Connect to field' (circled in red) and 'Available fields' (circled in red). Under 'Available fields', 'Task description' is selected with a checkmark, and 'Due date' is highlighted with a red circle. A red 'Done' button is visible at the bottom right of the form editor.

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

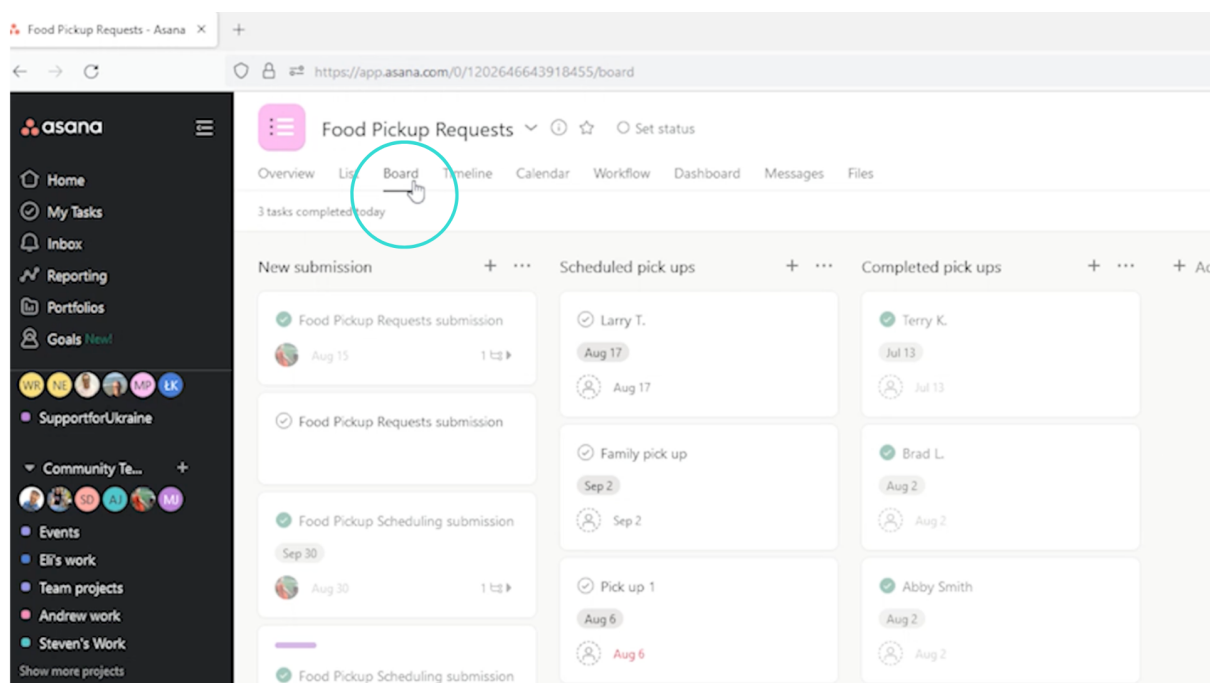
This screenshot shows the 'Edit form' interface in Asana, similar to the previous one. The 'Date' field is now configured with 'Connected to: Due date' (indicated by a red circle). The 'Done' button at the bottom right of the form editor is highlighted with a red circle, indicating the final step in the process.

Review New Form Submissions

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



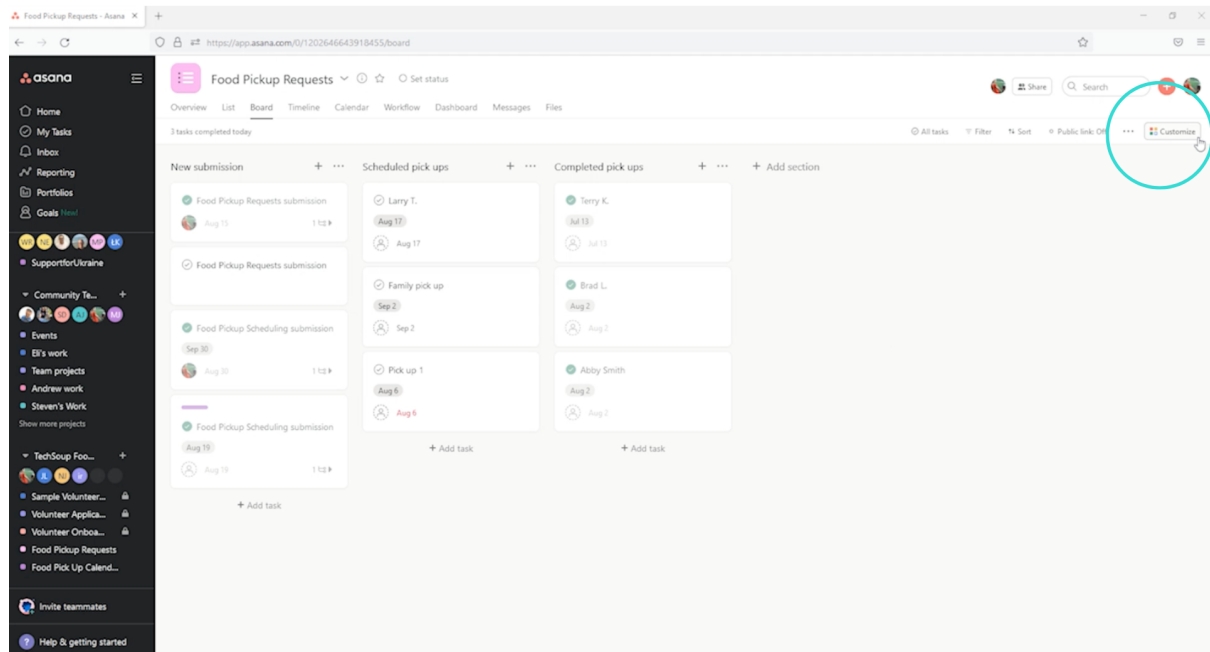
Tip: You can change the project view to make it easier to see the submissions. Click **Board** to see an overview of all submissions in a board layout.



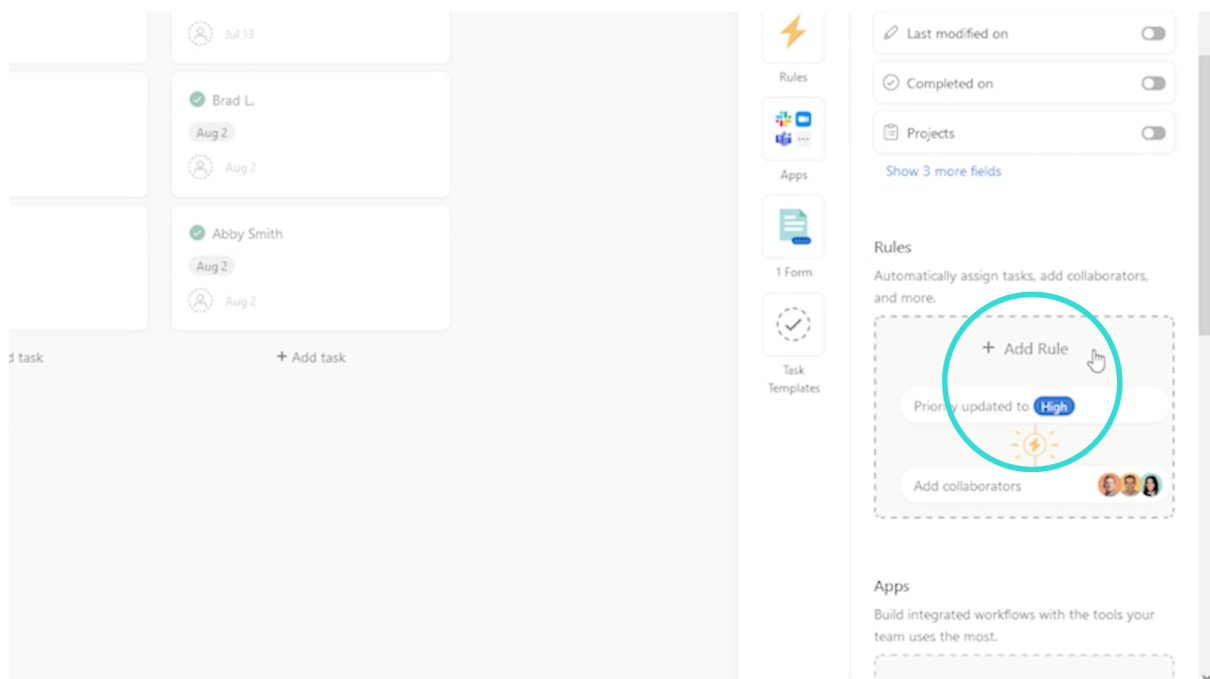
Set Up a Rule to Assign Submissions to Yourself

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.

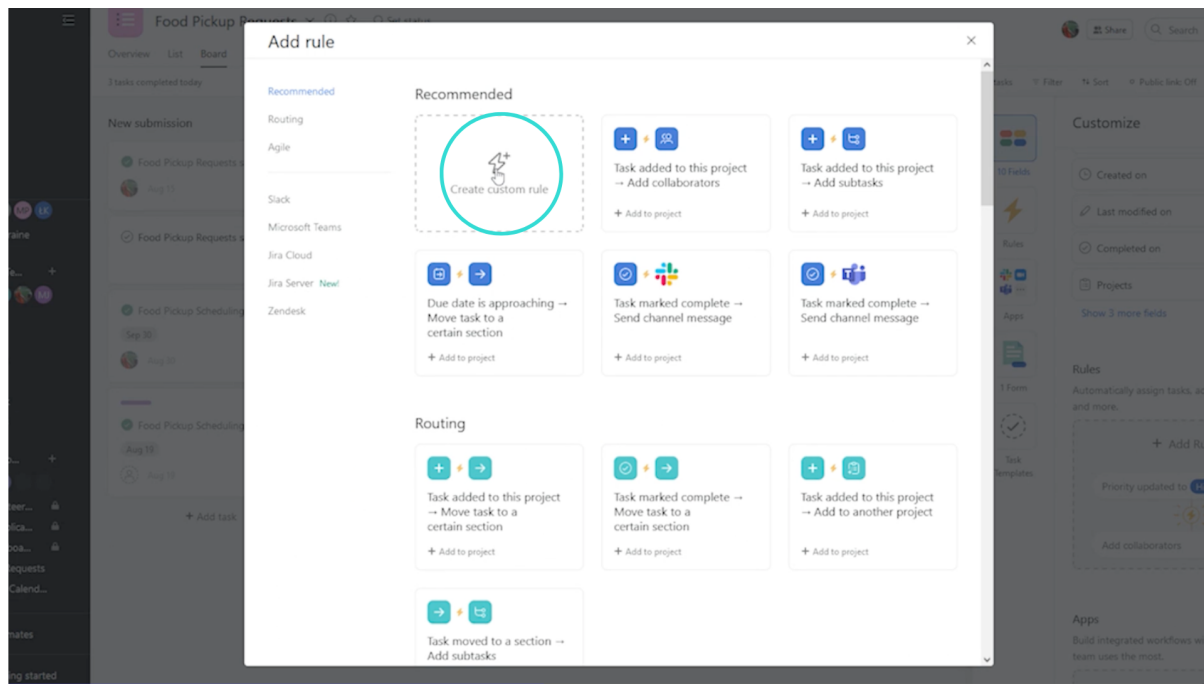
To set up a new rule to assign form submissions to yourself, click **Customize**.



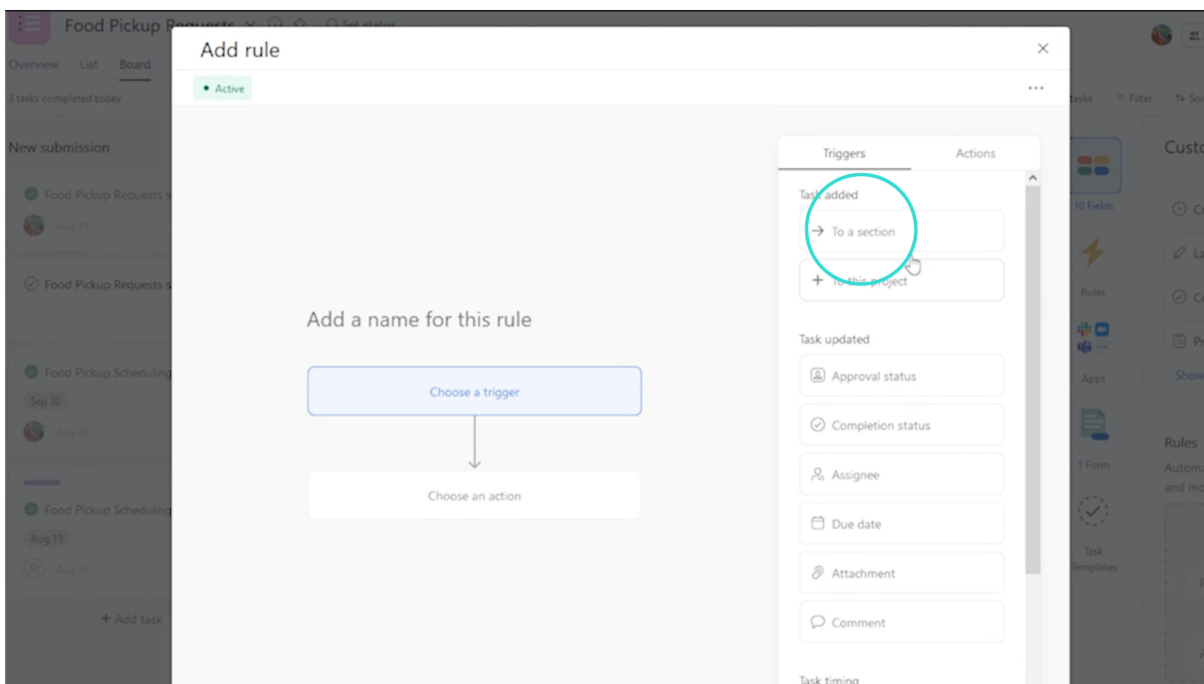
Scroll down to **Rules** and click **Add Rule**.



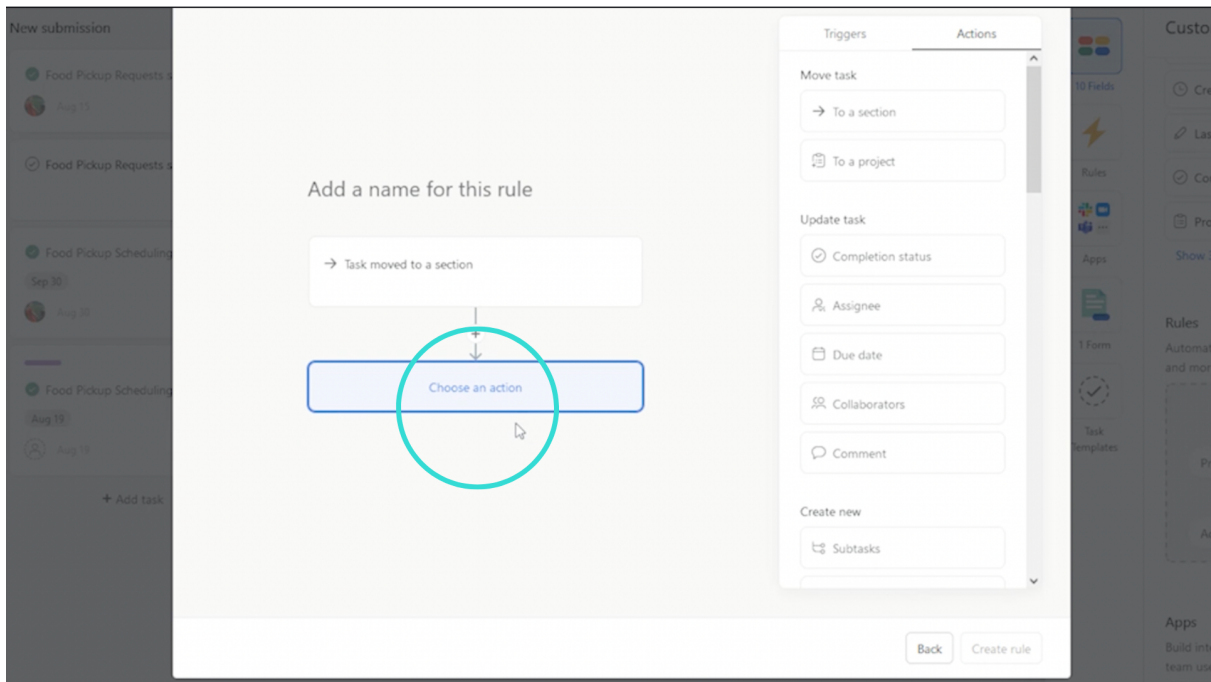
An Add Rule pop-up window will appear. Click **Create Custom Rule**.



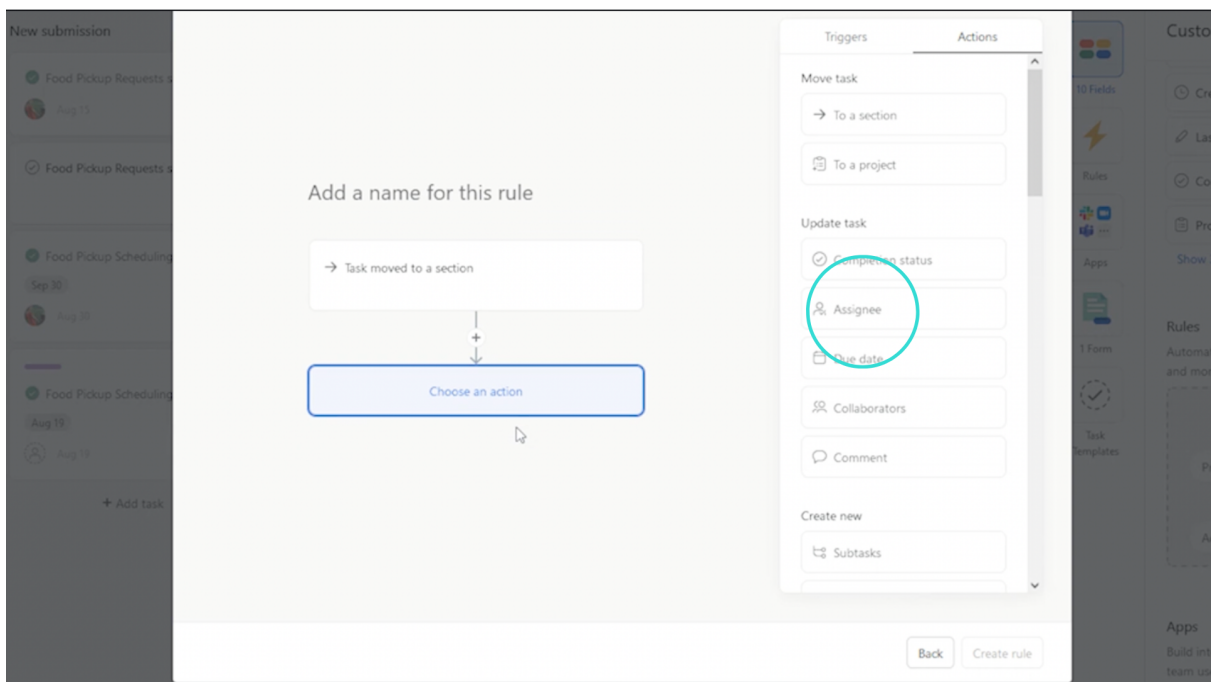
A new **Add Rule** popup window appears. Click **To a section** (under the Task added heading).



Now click **Choose an action**.

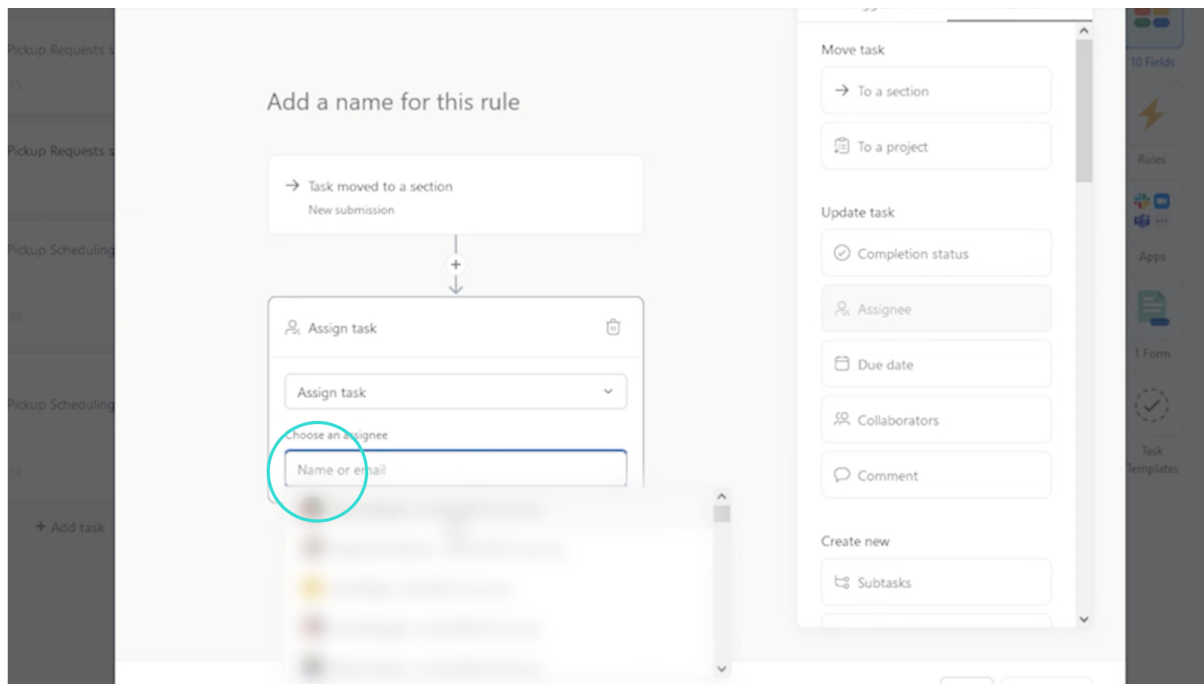


Next click **Assignee**.

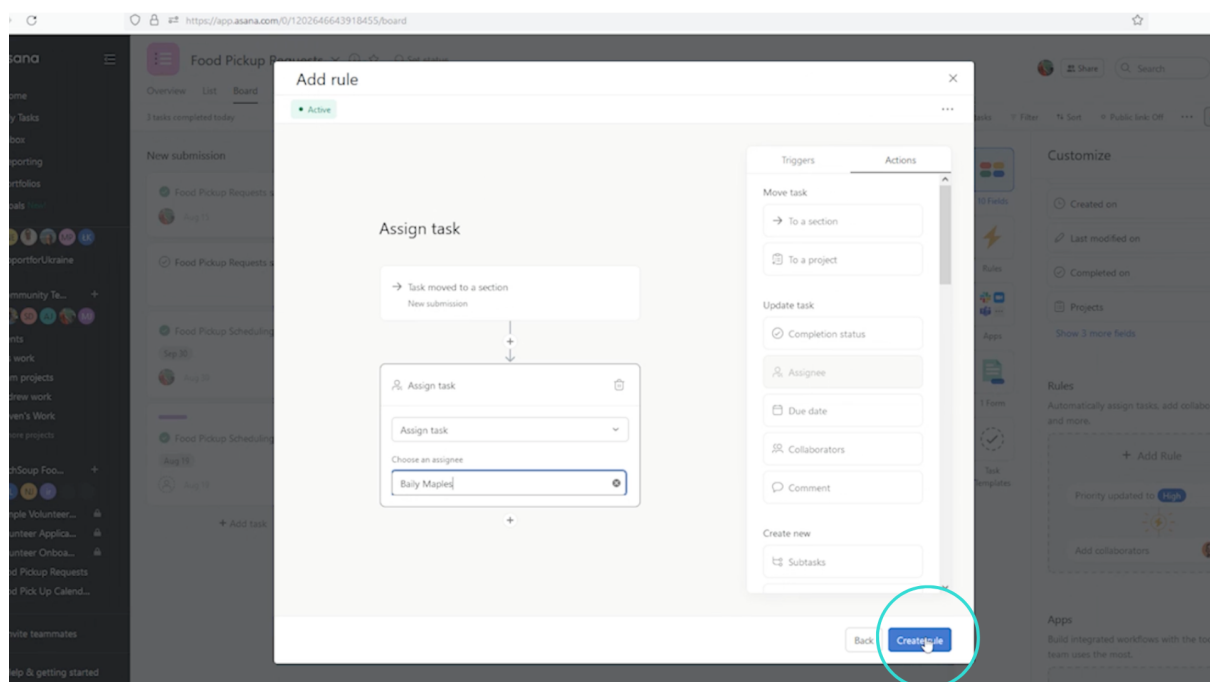


Then assign it to the person within your organization who you want to receive the email notifications when new pickup form submissions are received.

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

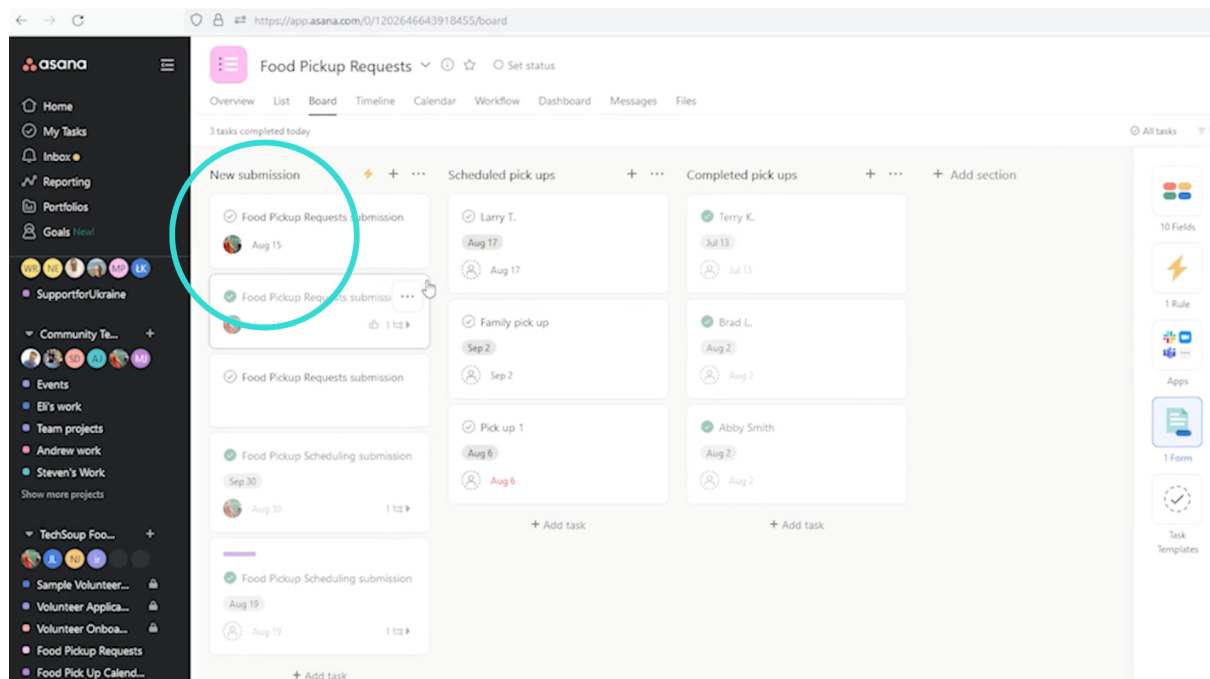


Then click **Create rule**.



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.

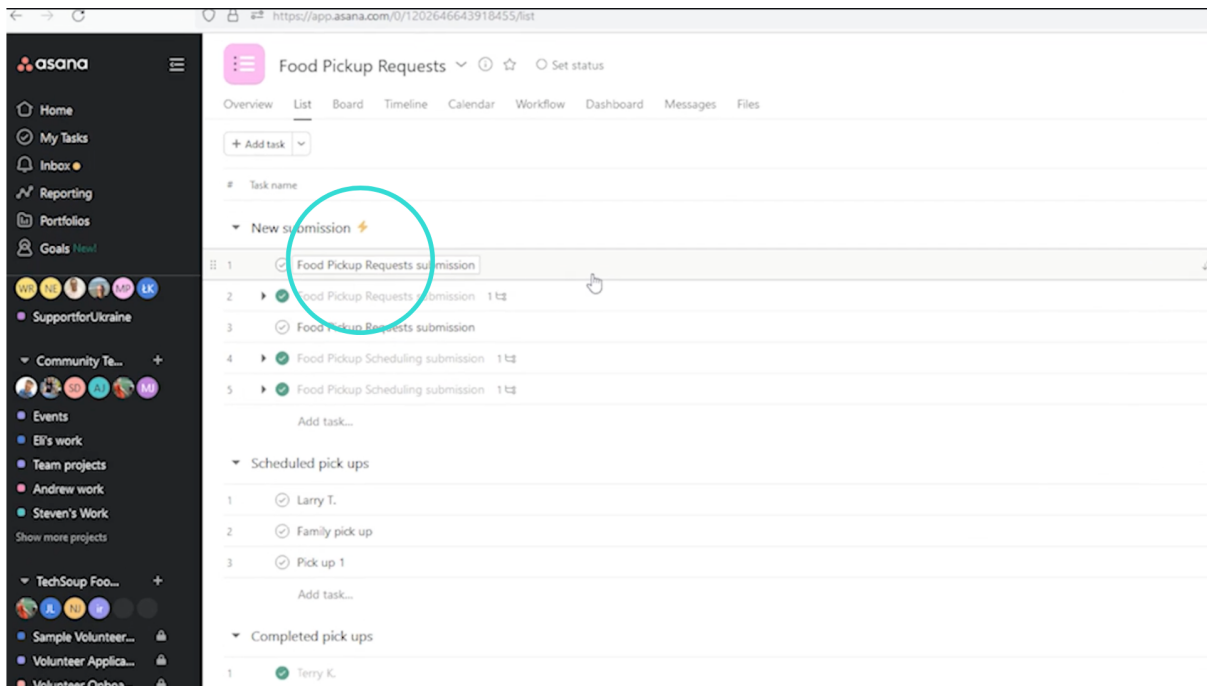
You could opt to either

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

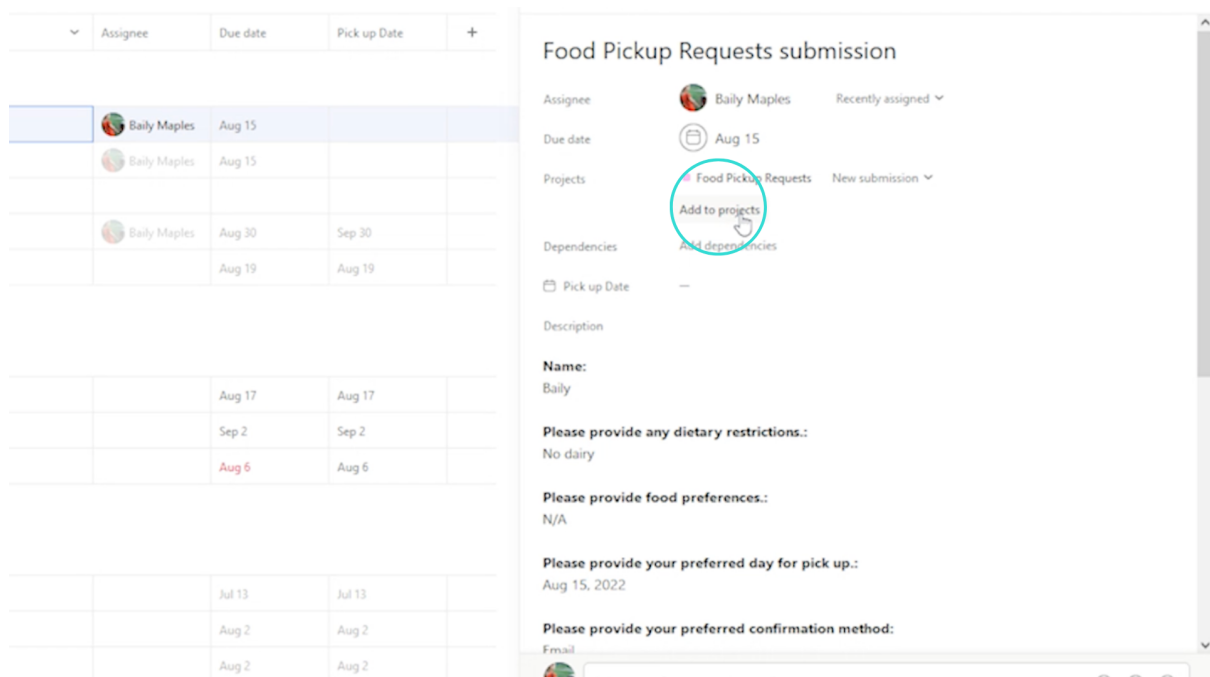
Create a Food Pickup Requests Calendar Project in Asana

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**.



Next, click **Food Pickup Requests Calendar project** from the dropdown menu. This will assign 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

Dependencies: Food Pickup Requests TechSoup Food Bank

Pick up Date: Food Pick Up Calendar TechSoup Food Bank

Description: Food Security Research Board: Round 2 Research and Impact

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

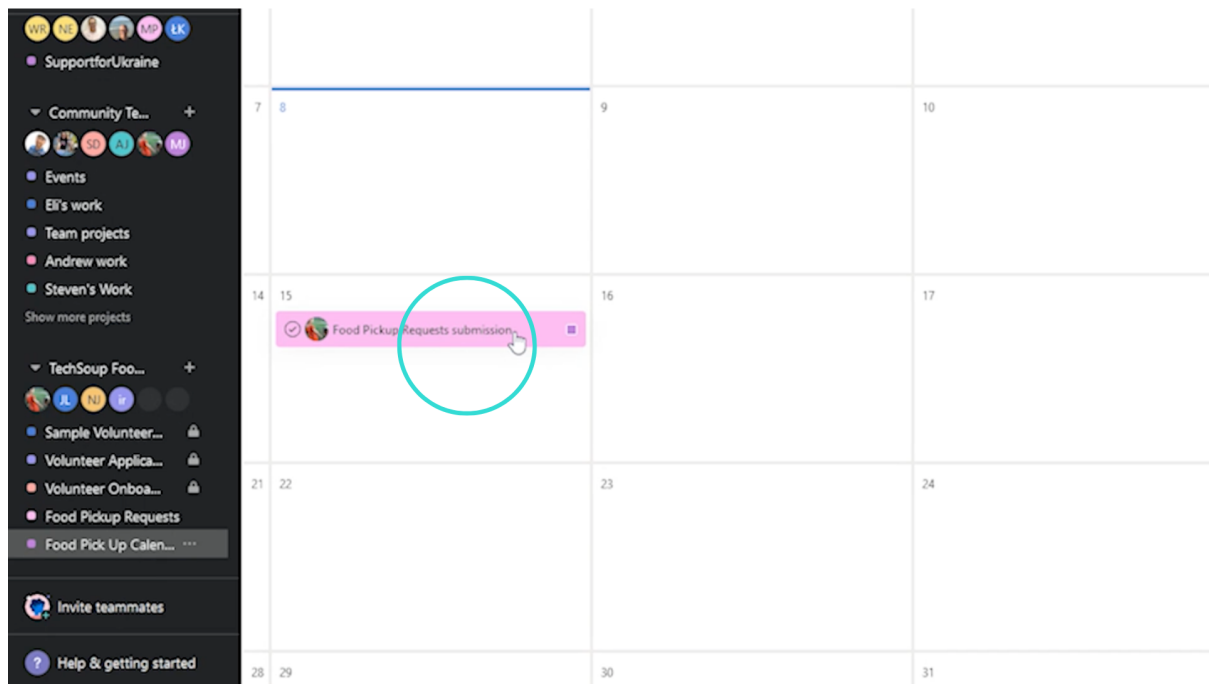
Please provide your preferred confirmation method:

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

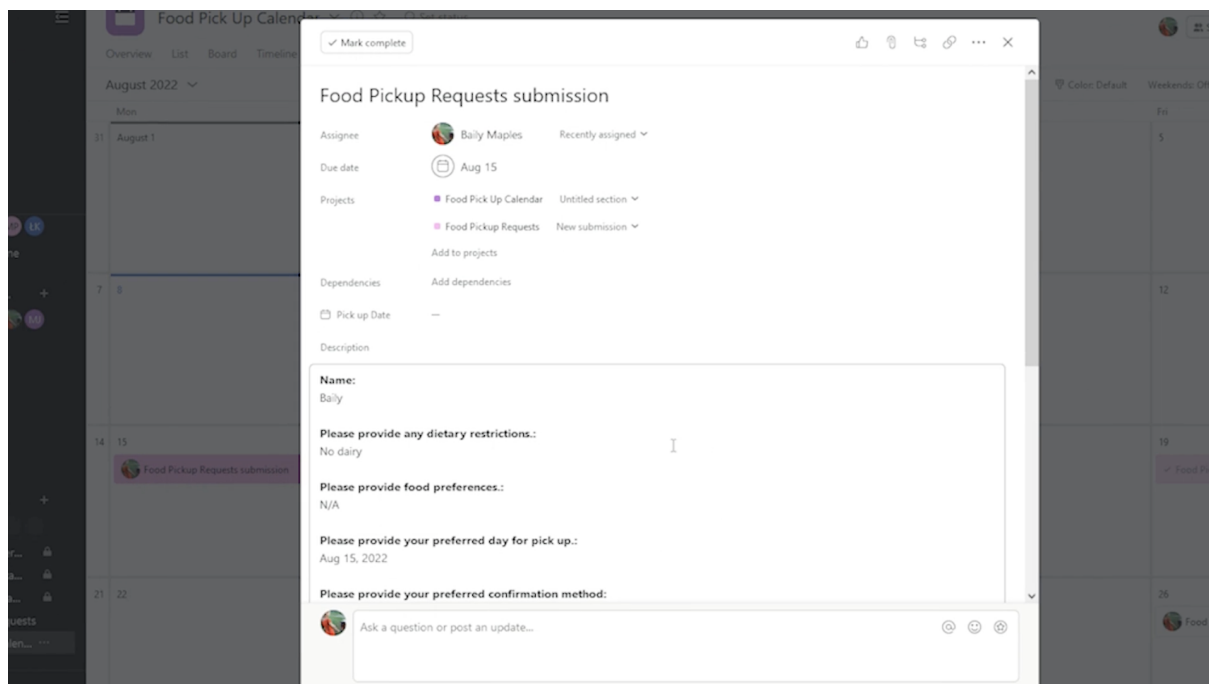
- SupportforUkraine
- Community Te...
- Events
- Eli's work
- Team projects
- Andrew work
- Steven's Work
- Show more projects
- TechSoup Foo...
- Sample Volunteer...
- Volunteer Applica...
- Volunteer Onboa...
- Food Pickup Requests
- Food Pick Up Calen...
- Invite teammates
- Help & getting started

7	8	9	10
14	15	16	17
21	22	23	24
28	29	30	31

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

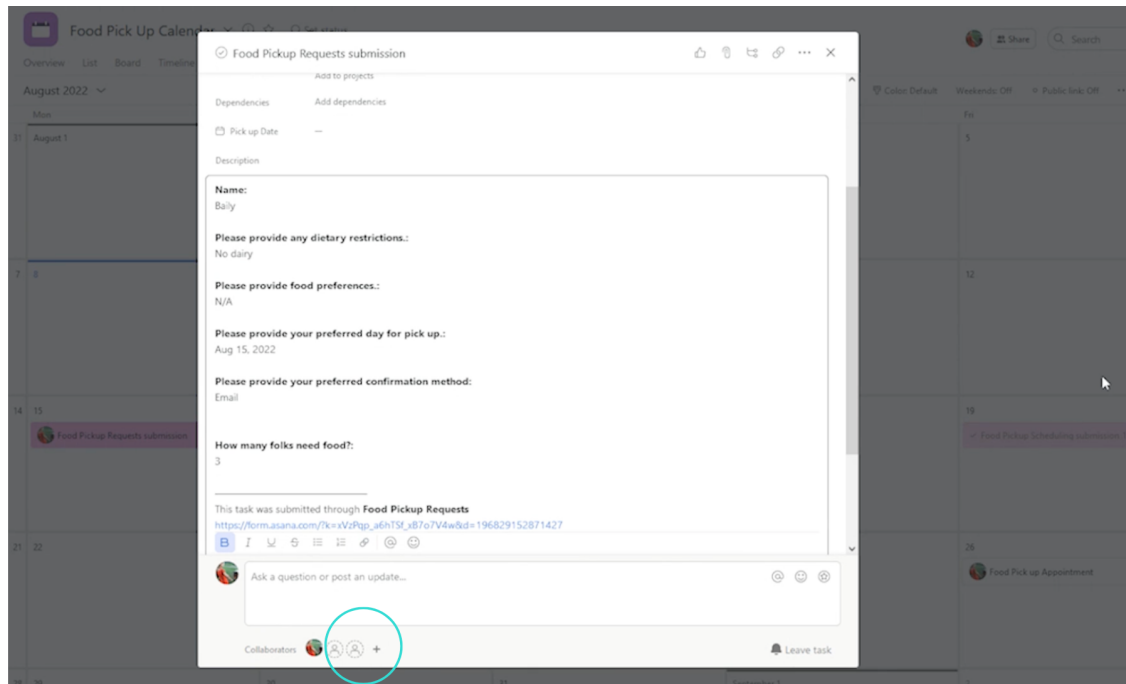


In this example, the task is called Food Pickup Requests submission. A new pop-up window for that task opens, and you can review and edit any information here.

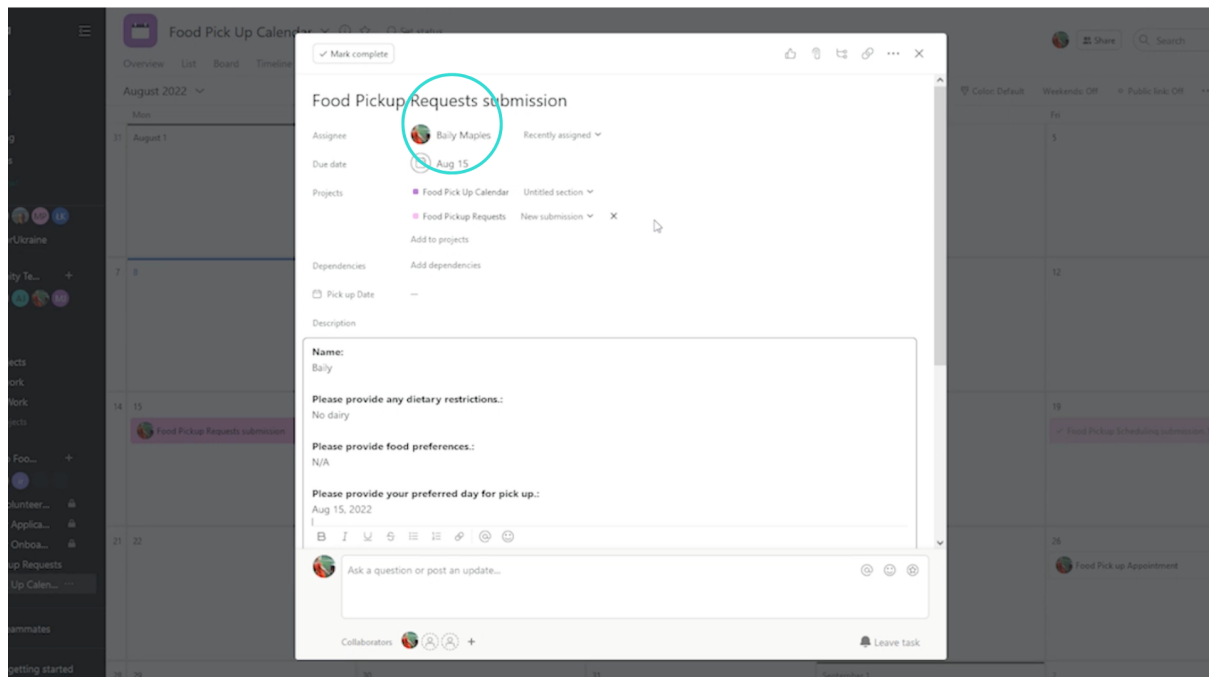


Tip: All the information that your client submitted on the Food Pickup Requests form will appear in the task on the calendar. You can edit and delete sensitive or private information from the calendar task, and those edits won't affect or delete the original submission.


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



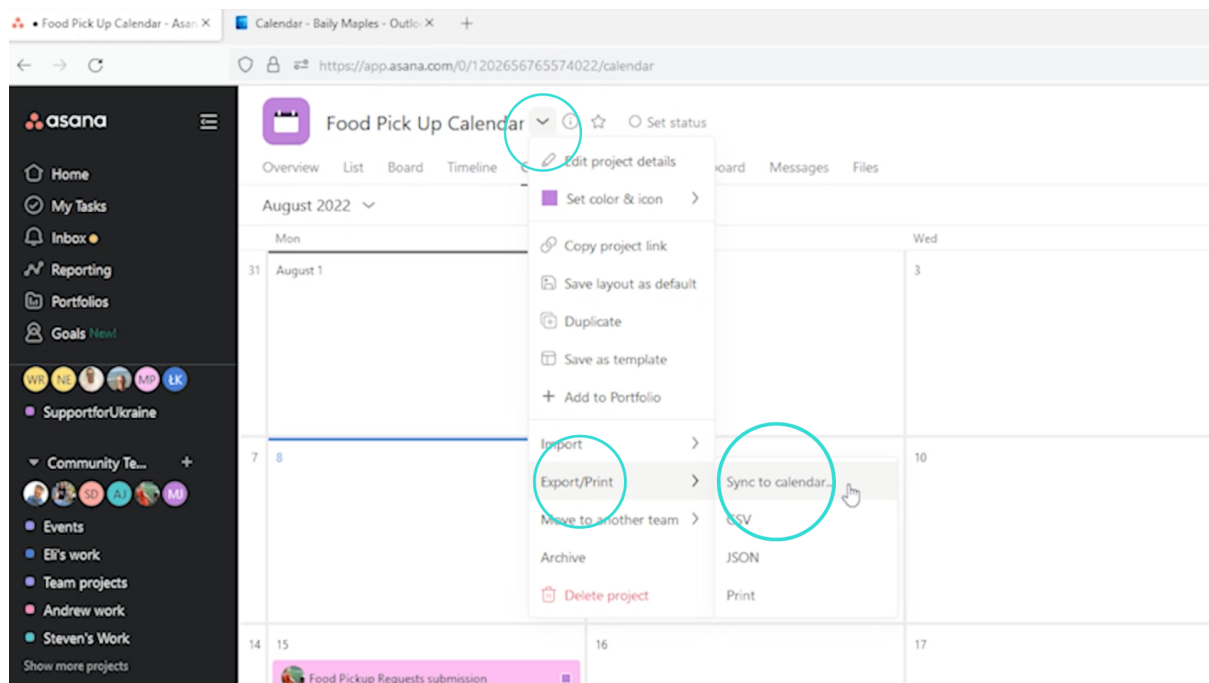
Tip: To reassign a task to another staff member, click on the assignee's name and select a new assignee.



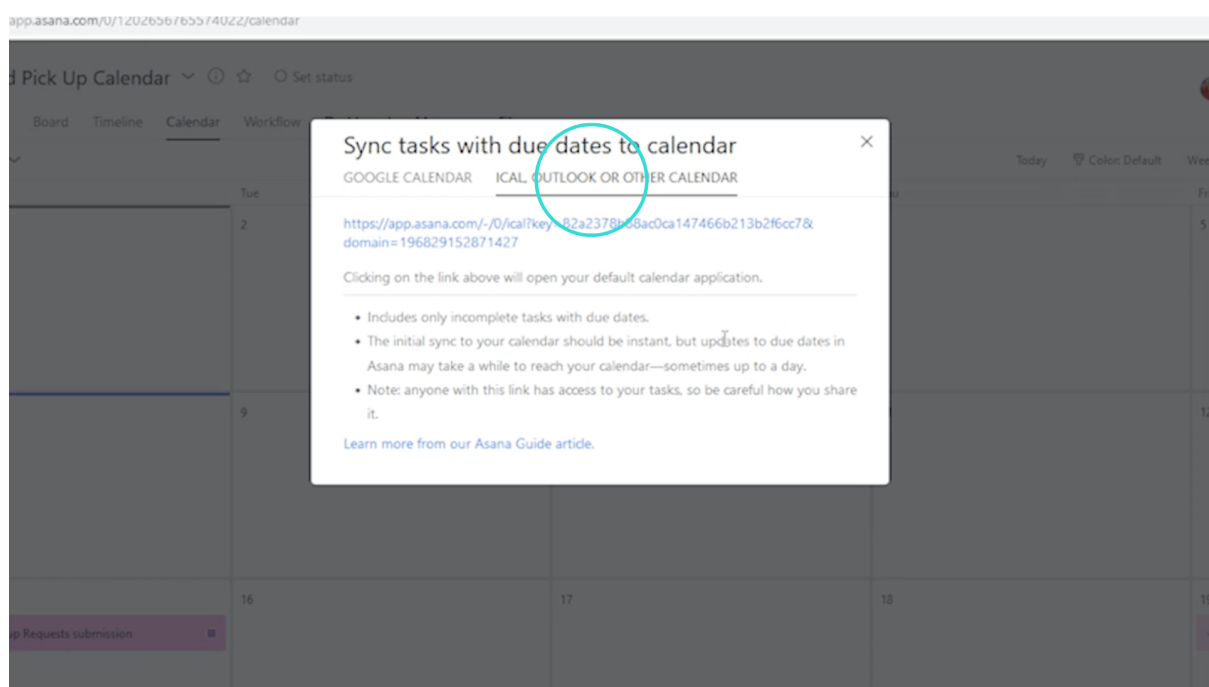
Sync Your Food Pickup Requests Calendar with Microsoft Outlook

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

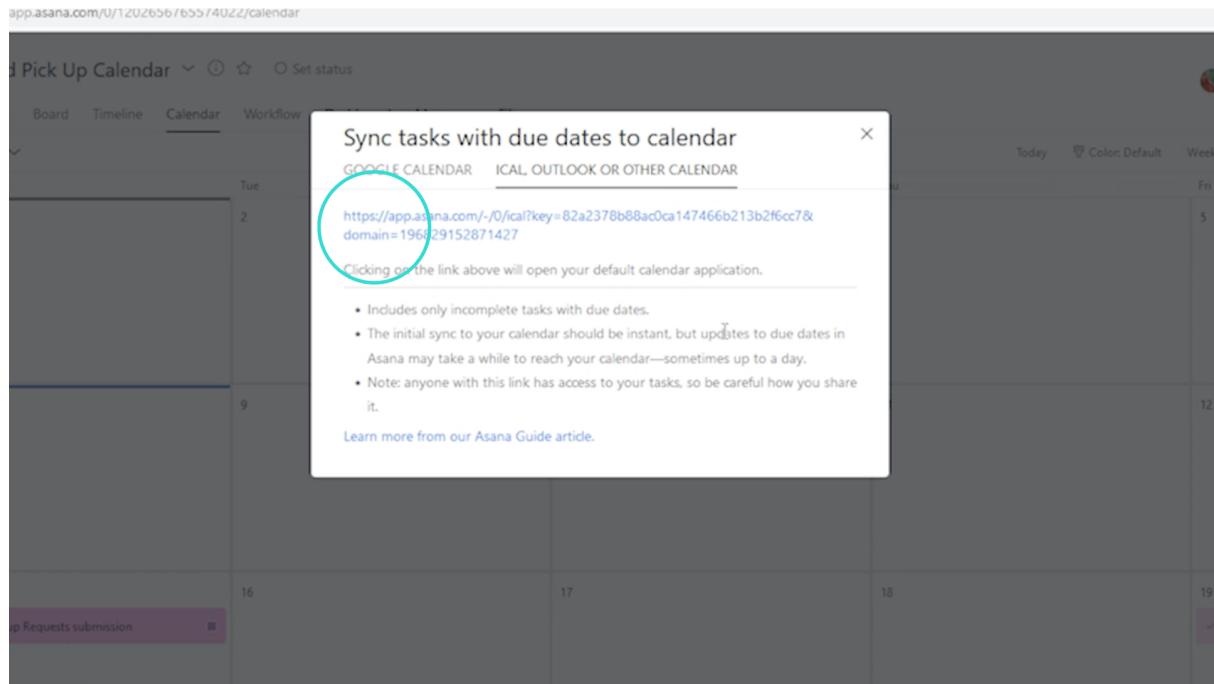
Tip: Before you choose to sync Asana tasks to Outlook, bear in mind that only incomplete tasks with due dates will be included. The initial sync to your calendar should be instant, but updates to due dates in Asana may take a while to reach your calendar — sometimes up to a day. Also note that anyone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



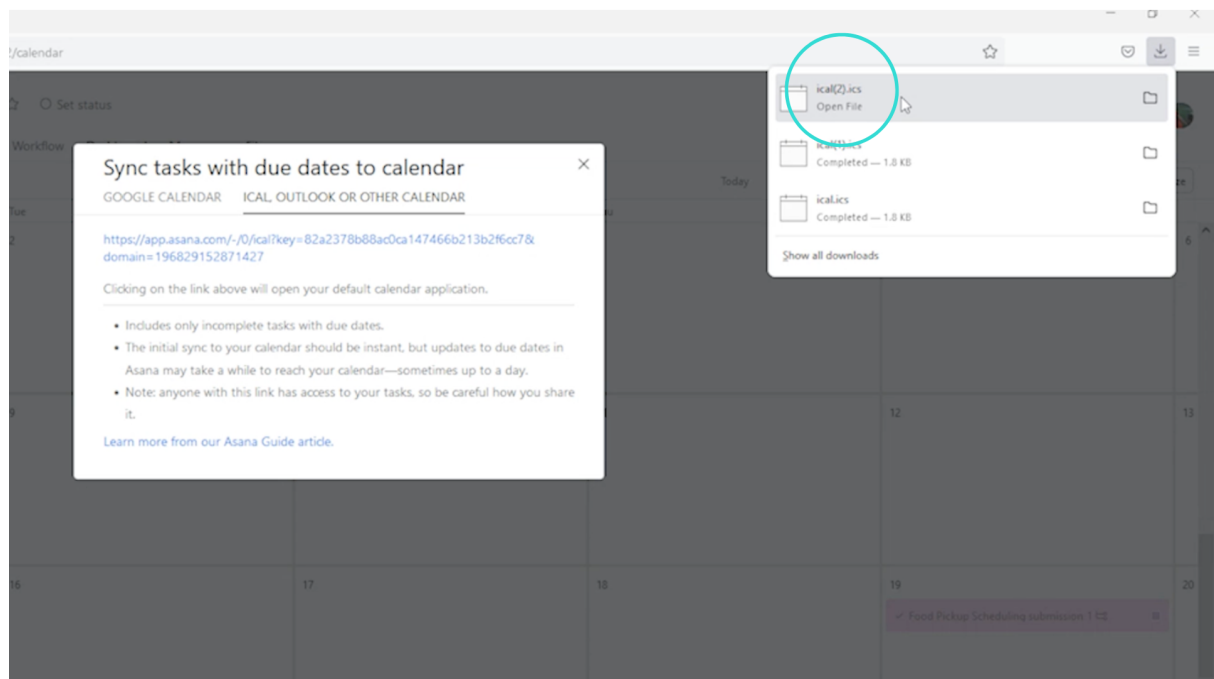
A Sync tasks with due dates to calendar pop-up window appears. Click **ICAL**, **OUTLOOK** **OR OTHER CALENDAR**.



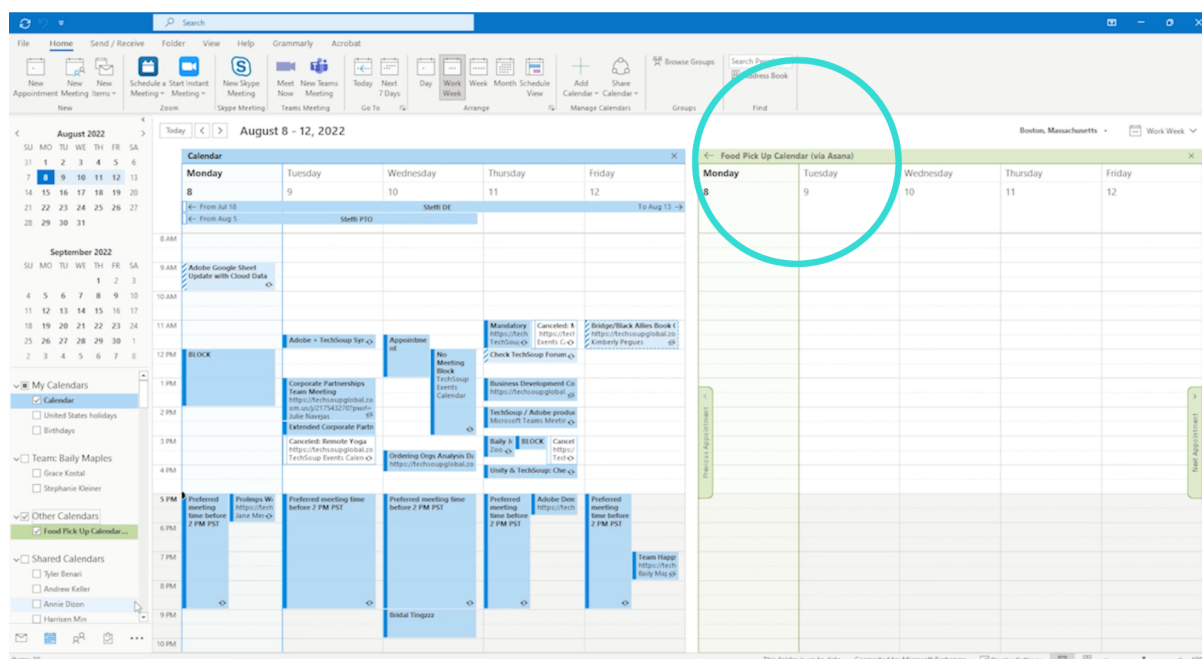
Click on the URL link that starts with <https://app.asana.com>.



An ical.ics calendar file will automatically download. Click the ical.ics download file.



Now Microsoft Outlook will automatically open. You will be able to view your Food Pickup Requests Calendar (via Asana), which has now been synced with Microsoft Outlook.



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](#)
- **Microsoft Digital Skills Center.** Work better with your team using Microsoft products.
- **Office 365 Support Services for Nonprofits.** TechSoup Services' expert team will help you implement and optimize Office 365 — a package of powerful cloud-based email and Office applications. Email migration and Office 365 implementation are a snap with TechSoup! We will take you through planning and migration to Office 365, including [moving your email](#) from your current email service.

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.](#)
- **Brand-new to Microsoft 365?** We recommend you start with this article about [What You Need to Know About Microsoft 365 Nonprofit.](#)

- **Brand-new to the Microsoft 365 Bookings app?** We recommend you start with the [Microsoft Bookings overview](#).