techsoup GLOBAL NETWORK

This tech recipe was made possible by a generous grant from the Truist Foundation.

Tech Recipe: How to Use Microsoft 365 to Schedule Food Pickup Appointments

Has your food security organization considered giving your clients the option to schedule their food pickup? Have you been looking for the right tool to help make scheduling food pickups with online appointments?

There are a range of **appointment scheduling apps** that can help your **clients schedule their food pickup appointments online**. The ability to pre-schedule food pickup appointments can save your clients time waiting in long queues at your food bank or food pantry. And pre-scheduled appointments can also help you to better predict how busy your food pantry or food bank will be at different times of the day. Plus you can cut down on admin work as you'll no longer need to manually schedule appointments.

Microsoft Bookings is a customizable Microsoft 365 app that makes it easy to schedule and manage digital bookings. This nifty tool lets you send your clients a link to your bookings calendar where they can book a pickup time that works best for them.

TABLE OF CONTENTS

- Who This Guide is For
- Objectives
- Step-by-Step Guide 🧩

Get Started

Create a new user in Microsoft 365

- Assign a license to the new user
- Create a pickup calendar using the Microsoft 365 Bookings app
- Create a new pickup for your Bookings calendar
- Send an invitation for scheduling a pickup
- Additional Resources
 - Training + Services *****
 - Content + Community (

Who This Guide Is For 📑

This guide is aimed at anyone wanting to learn how to use Microsoft 365's Booking app to create a digital calendar that allows food security organization clients to schedule a food pickup appointment.

- It's perfect for anyone who's new to Microsoft 365. Even if you have intermediate or advanced knowledge of this tool, you'll hopefully learn some useful tips and tricks.
- Are you new to Microsoft 365 and the Bookings app? This guide will show you all the steps to take to create a new user, assign a license to a new user, create a pickup calendar using the Microsoft Bookings app, and send an invitation for scheduling a pickup.
- Are you experienced at manually creating food pickup appointments for your food security organization? This guide can help show you how to easily transition to using a digital bookings calendar and appointment setting tools.

While Microsoft 365 has a wide range of applications, our focus here is on using it with the Bookings app so that clients can schedule food pickup appointments.

Objectives 🎯

In this tech recipe, we'll show you how to create a pickup calendar using Microsoft 365's powerful calendar scheduling tool: the Bookings app.

We'll also show you how to get started by creating a new user in Microsoft 365, and how to assign a license to a new user. And we'll guide you on how to create a pickup calendar using the Microsoft Bookings app, and how to send the invitation to your clients so they can use the online booking calendar.

Need Microsoft 365? Licenses are available to TechSoup members. Visit <u>the program page</u> <u>on TechSoup</u> today to get started.

Step-by-Step Guide 🧩

Get started

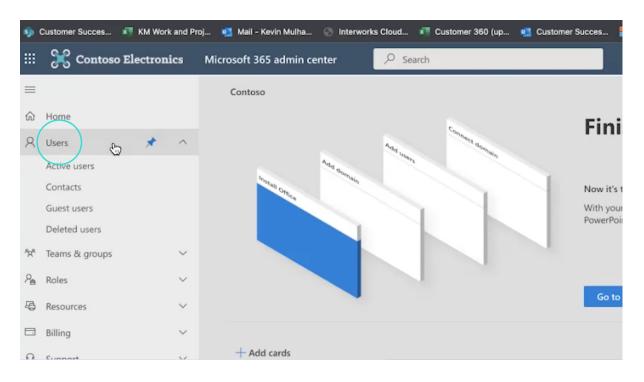
To use Microsoft 365, you'll need to have created a qualified account at the <u>Microsoft</u> <u>Nonprofit portal</u>.

You'll also need to ensure that you're properly licensed to use the Microsoft 365 Bookings app (which requires you to have a Microsoft 365 Business Basic license or higher).

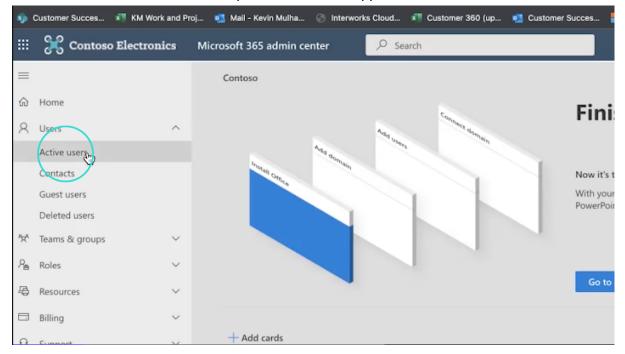
To get started using the <u>Microsoft 365 Bookings app</u>, sign in to the <u>Microsoft 365 admin</u> <u>portal</u> using your global admin account credentials. You'll then need to create a new user and assign a license to the new user in the Microsoft 365 admin portal before you start using the Bookings app.

Create a new user in Microsoft 365

To create a new Microsoft 365 user, open the Microsoft 365 admin portal and click on Users on the left side menu.



Click on Active users from the dropdown menu that appears.



Click Add a user.

S p. (Customer Succes 🗾 KM Work and Pr	oj 🔨 Mail - Kevin Mulha 💮 Interv	vorks Cloud 🛛 🕅 Customer 360 (up 🧧 Customer Succes
	🔀 Contoso Electronics	Microsoft 365 admin center	✓ Search
=		Home > Active users	
ŵ	Home	Active users	
8	Users ^	Add a user (Shift+A+U)	
1	Active users		
	Contacts	🖇 Add atger 📃 User tem	plates 🔏 Add multiple users 👌 Multi-factor authentication
	Guest users		
	Deleted users	Display name ↑	Username
^a x ^a	Teams & groups V	Adele Vance	AdeleV@M365x942167.OnMicrosoft.co
2	Roles 🗸	Alex Wilber	AlexW@M365x942167.OnMicrosoft.con
4	Resources 🗸	Allan Deyoung	AllanD@M365x942167.OnMicrosoft.cor
	Billing ~	Automate Bot	AutomateB@M365x942167.OnMicrosof
0	Support V		

A Set up the basics popup screen will appear where you can add user information.

		t.com/Adminportal/Home#		🎨 🖈 🔳 🇔 Incognito 🗄
Succes XII	KM Work and P	roj 🥶 Mail - Kevin Mulha	🛞 Interworks Cloud 📲 Custo	omer 360 (up 🧧 Customer Succes 🚦 Partner Center 🛛 KM Work and Proj » 🗎 Other Bookmarks
III 💥 Contoso Ele	ectronics	Microsoft 365 admin c	enter $ ho$ Search	⊑
		Home > Activ	Add a user	
යි Home		Active u		Set up the basics
A Users	^		Basics	Set up the basics
Active users		& Add a user	Product licenses	To get started, fill out some basic information about who you're adding as a user.
Contacts		Aug a user		
Guest users		Display	Optional settings	•
Deleted users		Display		First name Last name
^ନ ନ୍ନ Teams & groups	~	Adele	O Finish	
₽ _B Roles	~	🗌 Alex V		Display name *
Resources	~	🗆 Allan I		
Billing	~	Autor		Username * Domains
Q Support	\sim	Bianca		@ M365x942167.onmicrosoft.com <
Settings	\sim	Bookir		Automatically create a password
Setup				Require this user to change their password when they first sign in
✓ Reports	~	🗆 Brian .		
		Broker		Send password in email upon completion
💝 Health	~	Camer		Email the new password to the following recipients *
Admin centers		Camer		admin@M365x942167.onmicrosoft.com
Aunah centers		Christi		
Cocurity		and the second se		

Click in the boxes provided and start typing to add your user's **First name**, **Last name**, **Username** and **Domain**. The **Display name** will auto populate.

Your custom domain for your 365 account should display by default in the **Domains** box. If it doesn't, you should be able to access it from the **Domain** dropdown menu.

Tip: If your food bank operates in multiple cities, consider creating a naming convention when adding new users and setting up an account for each particular food bank location. For

example, if you have a food bank in Jenks, Oklahoma, you could create that food bank as a user.

Tip: You can change the password settings at the bottom of the form, depending on your preferences. This includes **Automatically create a password, Require this user to change their password when they first sign in**, and **Send password in email upon completion**.

Here's an example of what your completed set up the basics form may look like.

	Last name
Jenks	Foodbank
Display name *	
Jenks Foodbank	
Username *	Domains
jenksfoodbank	@ M365x942167.onmicrosoft.com ∨
Send password in email upon	eir password when they first sign in completion
admin@M365x942167.onmic	:rosoft.com
	Display name * Jenks Foodbank Username * jenksfoodbank Automatically create a passwo Require this user to change th Send password in email upon Email the new password to th

To email a copy of the new user password, enter the email address of the person you want to send it to at the bottom of the form below Email the new password to the following recipients *.

	First name	Last name
Finish	Jenks	Foodbank
	Display name *	
	Jenks Foodbank	
	Username *	Domains
	jenksfoodbank	@ M365x942167.onmicrosoft.com
	 Automatically create a password Require this user to change their Send password in email upon co Email the new password to the f admin@M365x942167.onmicro 	r password when they first sign in ompletion following recipients *

Then click Next.

Jenks Display name * Jenks Foodbank Username *	Domains
Jenks Foodbank	Domains
	Domains
Username *	Domains
jenksfoodbank	@ M365x942167.onmicrosoft.com
Send password in email up	e their password when they first sign in pon completion کی o the following recipients *
	 Require this user to chang Send password in email u Email the new password t

Assign a license to a new user

Once you've created a new user, you'll be directed automatically to a page where you can assign a license to a new user.

1	Select location *
 O Finish	United States \checkmark
	Licenses (0)*
	Assign user a product license
	Enterprise Mobility + Security E5 2 of 20 licenses available
	Microsoft 365 E5 Compliance 3 of 20 licenses available
	Microsoft Power Automate Free 9999 of 10000 licenses available
	Office 365 E3 1 of 2 licenses available
	Office 365 E5 You have no more licenses for this trial subscription. You need to buy a subscription before you can assign a license.
	Back Next Car

To assign a license, start by selecting your location. Click on the dropdown menu below **Select location**, and select the country where you're located e.g. United States.

O Finish	Select location * United States
	Licenses (0)*
	Assign user a product license
	Enterprise Mobility + Security E5 2 of 20 licenses available
	Microsoft 365 E5 Compliance 3 of 20 licenses available
	Microsoft Power Automate Free 9999 of 10000 licenses available
	Office 365 E3 1 of 2 licenses available
	Office 365 E5 You have no more licenses for this trial subscription. You need to buy a subscription before you can assign a license.
	Back Next Can

Next, **select the Microsoft license that you have**. In this example, we've selected the Office 365 E3 license. Then click **Next**.

O Finish	Select location * United States	
	Licenses (1)*	
	 Assign user a product license Enterprise Mobility + Security E5 2 of 20 licenses available Microsoft 365 E5 Compliance 3 of 20 licenses available Microsoft Power Automate Free 9999 of 10000 licenses available Office 365 E3 	
	Off 2 licenses available Office 365 E5 You have no more licenses for this trial subscription. You need to buy a subscription before you can assign a license. Back Back	Can

Note: You'll need to have the Microsoft 365 Business Standard license or higher to use the Bookings app feature.

A new **Optional settings** popup screen will now appear. Here you have the option to provide information that's part of role-based access control, where you can set higher levels of permission for user accounts if you would like. Either leave the default settings or edit them and then click on **Next**.

		induite - richt	Add a dser		
	~	Active ι	Basics	Optional settings	
isers S		R, Add a user	Product licenses	You can choose what role you'd like to assign for this user, and fill in additional profile information.	
sers users		Display	Optional settings		
ž groups	~	Adele	C Finish	Roles (User: no administration access)	
	~	Alex V		Profile info	
es	~	🗌 🛛 Allan (
	~	Autom			
t	~	🗌 Bianca			
5	~	🗆 Bookir			
	~	🗌 🛛 Brian J			
	~	Broker			
		Camer			
rs		Christi		\frown	
		Conf F		Back Neur	Car
ance		-			

A new **Review and finish** popup screen will appear. Here you can review all the information you have provided to check it's correct and accurate, and you have the opportunity to edit any information. If everything looks fine, click **Finish adding**.

		The Trees	Add a user	
	^	Active ι	Basics	Review and finish
isers		0		
ts		🔍 Add a user	Product licenses	
isers				Assigned Settings
lusers		Display	 Optional settings 	Review all the info and settings for this user before you finish adding them.
P. arouar	~	Adele		Display and username
& groups	Ť	Adele	Finish	Jenks Foodbank
	\sim	Alex V		jenksfoodbank@M365x942167.onmicrosoft.com
				Edit
:es	~	Allan I		Provinced
	~	Autor		Password Type: Auto-generated
		Autom		Send To: kmulhall@techsoup.org
t	\sim	Bianca		Edit
s	\sim			
		Booking		Product licenses
		Brian J		Location: United States
	~	Brian J		Licenses: Office 365 E3 Apps: Viva Learning Seeded, Nucleus, Information Protection and Governance Analytics – Standard, 26
		Broker		
	\sim			Edit
_		Camer		Roles (default)
ers		Christi		User (no admin center access)
		Cimsu		
		Conf F		Back Fingh adding Cai
ance				

A new popup screen will appear confirming the name of your new user as being added to active users. This is an example of what this screen may look like.

22.0	Sustomer succes Kar KM Y	NUIK and PI	oj 🛀 Maii - Kevin Muina I	Interworks Ci	Cloud Am Cusion	iner sou (up 🥦 customer succes 📷 Partner center 🔺 KM work and	Pi0j		" I U	Other Boo	okmarks
	🔀 Contoso Electro	onics	Microsoft 365 admin ce	enter 📝	♀ Search		۵	3 () @	?	MA
=			Home > Activ	Add a user							
ŵ	Home		Active ι			Jenks Foodbank added to a	ctive	ICOP	F		
8	Users	^		Basics			cuvet	aser.	3		
1	Active users		8. Add a user	Product lic	licenses	Jenks Foodbank will now appear in your list of active users.					
	Contacts Guest users										
	Deleted users		Display	Optional se	l settings	User details Display name: Jenks Foodbank					
⁹ 2 ⁴	Teams & groups	~	Adele	S Finish		Username: jenksfoodbank@M365x942167.onmicrosoft.com Password: Can27036	13.				
<i>P</i> e	Roles	~	Alex V			Sending to: kmulhall@techsoup.org					
4	Resources	~	🗌 Allan I			licenses bounds					
	Billing	~	Autor			Licenses bought None					
0	Support	~	Bianca			Licenses assigned					
	Settings	~	🗌 Bookir			Office 365 E3					
P	Setup		🗆 Brian J								
K	Reports	\sim	Broker			Save these user settings as a template?					
8	Health	~	Broker Camer			User templates allow you to quickly add similar users in the of shared settings such as domain, password, product licens			t		
Adm	nin centers					Review settings for this user template	end roles.				
	Security		Christi			terreter sectory to all user template					
•	Compliance		Conf F			Close					

Here you will have the option to **Save these user settings as a template** and to send an email to individuals notifying them that this user account has been created, and to also send any other associated account information you wish.

-		Home > Activ	Add a user	
		nome / Activ	Add a user	
ර Home		Active u		Licenses assigned
Users	^		Basics	Office 365 E3
Active		8 Add a user	Product licenses	
Contac			Ī	Save these user settings as a template?
Guest (Display	Optional settings	User templates allow you to quickly add similar users in the future by saving a set
	& groups V	Adele		of shared settings such as domain, password, product licenses, and roles.
	v groups		Finish	Review settings for this user template
		Alex V		Name your template *
Resour	rces 🗸 🗸	🗆 Allan I		Example: FTE Senior Engineer, New York
Billing	~	Autom		
Suppo	rt 🗸	Bianca		Add a description (recommended) Example: Template for full-time senior engineers in New York office
Setting	ls 🗸	Bookit		Example, tempate for full-time senior engineers in New York Onice
9 Setup				Make this template available to other admins who manage users.
C Report	s v	🗆 Brian .		If you want to un-publish a template, delete it. You can't change a template to private after it is published.
Health	~	Broker		
		Camer		Save as template
dmin cent	ers	Christi		
Securit	У	Conf F		

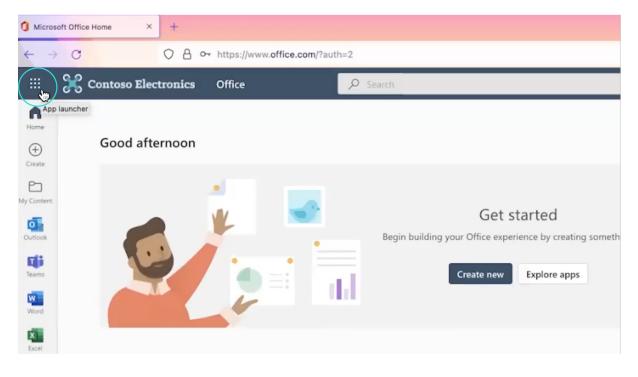
Click **Close**. You have now successfully created a new user and assigned them an active license.

iii 🔀 Contoso El	ectronics	Microsoft 365 admin o	center $ ho$ Search		P (M
		Home > Activ	Add a user		
A Home		Active ι		Jenks Foodbank added to active users	
R Users	^		Basics	· Jenks roodbank added to active users	
Active users Contacts		🙈 Add a user	Product licenses	Jenks Foodbank will now appear in your list of active users.	
Guest users Deleted users		Display	 Optional settings 	User details Display name: Jenks Foodbank	
R ^a Teams & groups	~	Adele	Finish	Username: jenksfoodbank@M365x942167.onmicrosoft.com Password: Can27036	
a Roles	~	Alex V		Sending to: kmulhall@techsoup.org	
Resources	~	🗆 Allan I		Licenses bought	
3 Billing	~	Autor		None	
Support	~	Bianca		Licenses assigned	
3 Settings	~	Bookir		Office 365 E3	
Setup		🗆 Brian .			
C Reports	\sim	Broker		Save these user settings as a template?	
9 Health	~	Camer		User templates allow you to quickly add similar users in the future by saving a set of shared settings such as domain, password, product licenses, and roles.	
dmin centers		Christi		Brownew settings for this user template	
Security				Close	
Compliance				ciose	

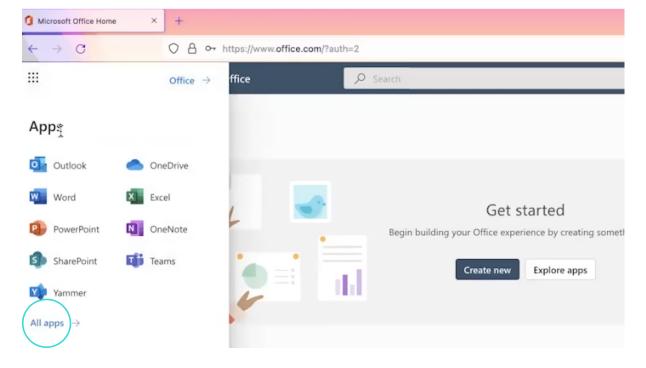
Create a pickup calendar using the Microsoft 365 Bookings app The Booking app is an online Microsoft 365 service, so you won't need to download the app.

To access the app, log into your <u>www.office.com</u> account (with your username and password). Click on the **App launcher** icon.

Tip: There is also a companion app if you're running <u>iOS</u> or <u>Android</u> (and you'll still need Office 365 Business Standard or higher subscription to access it).



A new screen will appear showing a range of Microsoft 365 apps. Click on All apps.



A new screen will appear showing all the available apps. Click the **Bookings** app.

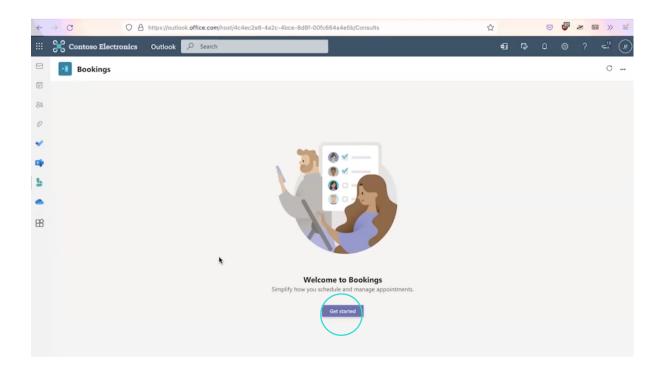
← Back	
, ○ Search all of your apps	
Office apps	
Add-Ins	Get started
Bookings	
Calendar	Create new Explore apps
Delve	6
X Excel	
Forms	
🔀 Kaizala	pened 왕 Shared ☆ Favorites +
Lists	

When you first launch an account, it will connect with the Outlook calendar associated with that account. You'll automatically be connected with Outlook and redirected to Outlook.

Click on the **Bookings** app icon which directs you to the Bookings app.

o c c c c	https://outlook.office.com/mail/	*		¢.	æ 💷 »>	=
🔀 Contoso Electronics	Outlook 🔎 Search	¢]	₽ > 0			JF
🗹 New message						
 Favorites 	Inbox 🚖 😇 Filter					
🕞 Inbox						
➢ Sent Items						
🔊 Drafts	*					
Add favorite	-					
Folders						
D Inbox						
🔊 Drafts	1000					
Deleted Items	All done for the day					
🔁 Junk Email	Enjoy your empty inbox.					
Notes						
Conversation						
Create new fol						
✓ Groups						
	 Contoso Electronics New message Favorites Inbox Sent Items Drafts Add favorite Folders Inbox Porafts Sent Items Drafts Sent Items Inbox Drafts Sent Items Junk Email Archive Notes Conversation Create new fol 	Contoso Electronics Outlook Search Inbox Inbox	Contoso Electronics Outlook New message Favorites Inbox Inbox Inbox Sent items Defets Add favorite Inbox Inbox <th>Contoso Electronics Outlook Search Imbox Favorites Inbox Inbox Imbox Inbox Imbox Search Imbox Inbox Imbox Inbox Imbox Inbox Imbox Imbox Imbox Imbo</th> <th>Contoso Electronics Outlook Contoso Electronics Outlook Section Inbox Section Inbox Inbox Inbox</th> <th>Contoso Electronic: Outlook Contoso Electronic: Outlook Search Image: Contoso Electronic: Notox Forwersaspe Inbox Filter Inbo</th>	Contoso Electronics Outlook Search Imbox Favorites Inbox Inbox Imbox Inbox Imbox Search Imbox Inbox Imbox Inbox Imbox Inbox Imbox Imbox Imbox Imbo	Contoso Electronics Outlook Contoso Electronics Outlook Section Inbox Section Inbox Inbox Inbox	Contoso Electronic: Outlook Contoso Electronic: Outlook Search Image: Contoso Electronic: Notox Forwersaspe Inbox Filter Inbo

Click **Get started** to follow the Microsoft Wizard that leads you through an overview of the Bookings app.



To add a booking calendar, click New booking calendar.

~	→ C O A https://outlook.office.com/h	ost/4c4ec2e8-4a2c-4bce-8d8f-00fc664a4e5b/Consults	☆		9	9	# 1		=
	Contoso Electronics Outlook 🔎 Search		40	₽	٥	۲	?	10	(JF
	Bookings							C	
89									
O		Add a booking calendar							
~									
ыþ		New booking cale dar							
5									
•		Existing booking calendar							
B									
		k							
		Cancel							

A new screen will appear called Add a new booking calendar.

To add a business name, click on the **Type a business name** box and start typing (e.g. Jenks Foodbank).

←	→ C O A https://outlook.office.com	host/4c4ec2e8-4a2c-4bce-8d8f-00fc664a4e5b/Consults		ť	3		0	B	2 1	a »	=
	Contoso Electronics Outlook 🔎 Search				đ	₽	٥	۲	?	ч ³	JF
	Bookings									C	
83											
Ø		Add a new booking calendar									
v		The business name you enter will be used to create the email address for sending booking invites (e.g., businessname@domain.com)									
D		utsiness or department name *									
5		Type a business name									
•			_								
BÊ		Bulmers type Select business type	~								
		Send attendee responses to									
		Type an email address									
		Business phone number									
		Type a phone number									

To select a business type from the dropdown menu, click Select business type and a dropdown menu will appear. As a food security organization, you may want to select Other.

~	→ C O A	https://outlook.	office.com/h	ost/4c4ec2e8-4a2c-4bce-8d8f-00fc664a4e5b/Consults		☆		S	æ 🛙	I >>	=
	🔀 Contoso Electronics	Outlook 🗾	O Search			¢	۵			v ¹³	(JF
	Bookings									С	
88											
O				Add a new booking calendar							
*				The business name you enter will be used to create the email address for sending booking invites (e.g., businessname@domain.com)							
ыþ.				Business or department name *							
5				Type a business name							
•					-						
B				Business type * Select business type	~						
				Send uttanted responses to							
				Type an email address							
				Business phone number							
				Type a phone number							

To send attendee responses to a particular person/s, click on **Type an email address** and start typing to add an email address. You can also add various email addresses, separated by a comma, of the person/s you'd like to invite to manage your calendar.

Tip: You may want to send attendee responses to any staff at the food bank or food pantry that this calendar relates to (e.g. Jenks Food Bank), so that they can help to manage the bookings calendar for food pickups.

Business type *			
Other			~
Send attendee responses to Type an email address	I		
Type all entail address	Send attendee responses to		
Business phone number	Send ditender responses to		
Type a phone number			
< Back		Cancel	Save

To add a business phone number, click on **Type a phone number** and start typing to add the number. Then click **Save**.

Business type *	
Other	~
Send attendee responses to	
kmulhalljr@techsoup.org	
Basiness phone number Type a phone number	
*	

Now you will automatically be redirected to a new screen and will receive an email notification that your bookings calendar has been sent. The notification will be sent to the email associated with the Microsoft 365 account and any individuals that have been assigned to this account in the steps above.

~	→ C		ttps://outlook.office.co	m/host/4c4ec2e8-4a2c-	4bce-8d8f-00fc6	64a4e5b/Consults	☆	. ₩	* 19	≫ ≐
	Ж с	ontoso Electronics	Outlook 🔎 Searc	h			ŧ	• ••	?	∽ ¹³ (JF)
	-8	Bookings Schedule	Queue					nks Foodbank	oking ca	×
	< >	Tuesday, August 30, 2022	 Jenks Foodbank ~ 				He	ur Jenko Foodbank Ilo Jenks Foodbank	bu have	cr
83 Ø		Jenks Foodbank								
*	5 PM									- () () ()
5	6 PM									
88	7 PM									
	8 PM									
	9 PM									
	10 PM									
	11 PM									

Create a new service for your Bookings calendar

To start creating a new service for your Bookings calendar click the icon and select Open Bookings web app from the dropdown menu.

2e8-4a2c-4bce-8d8f-00fc664a4e5b/Consults	\$		☑	158	æ		. =
	đ	₽>	Q	۵	?	¹³	ſŗ
			₹ Al	ettings bout hird-pa pen Bo	rty no	tice s web ap	P

The Bookings web app will open automatically. Click **Get started**.

$\leftarrow \rightarrow \mathbf{G}$	0	A http	s://outlook.office.com	bookings/calendar					6		88	# >>	=
									the new Bookings				
← Back to all calendars			① New booking	$\fbox{ Today } \leftarrow \rightarrow$	August 30, 2022 🖂		Add time off	$igii$ Day by staff $^{\checkmark}$	🕞 Print 🖉 E	cport	Action	items	
JF Jenks Foodbank		~	() No Staff				JF Jenk	s Foodbank					
🖬 Calendar							×						
Booking page													
Customers			1 AM										
🐣 Staff			2 AM										
🛱 Services													
Business information			3 AM										
CALENDAR FILTERS			4 AM										
> Services	Q		4 AM										
∨ Staff	Q		5 AM	Mala									
🕑 🔏 No staff assigned		*			ome to a brand		IS!						
🖉 🕖 Jenks Foodbank			6 AM	mar	nage your settings and a r	noch new look.							
			7 AM		Get starte	red	- 1						
			8 AM	Contraction of the local division of the loc									
			9 AM										

The Bookings wizard will provide you with some additional information on how to set up the calendar.

To read all of the Bookings wizard information, click the **>** forward arrow icon to keep reading.

$\leftarrow \rightarrow \mathbf{G}$	O A http	ps://outlook. o	ffice.com/bookings/calendar		☆		y & 0	∎ ≫ ≓
					Try 1	the new Bookings 🦳	0	? (#
JF Jenks Foodbank	Manage & d calendars w If you manage this page will g and unified vier	vith ease multiple caler jive you a sim	k } ndars ple	$ ightarrow$ August 30, 2022 \vee	B Day by staff ∨ s Foodbank	⊖ Print 🗲 Export	Action	items 🗸
 € Customers Staff Services Business information 		3 PM 4 PM						
CALENDAR FILTERS	Q	5 PM 6 PM						
 Staff No staff assigned Investigation Investigation Investigation 	Q ∳	7 PM 8 PM						
		9 PM						
		10 PM						

To create a new bookings service, click Services.

	os://outlook. office.com /bookings/calendar	☆
		Try the new Bookings 💽 🚳 ? (JF
← Back to all calendars	Onew booking	🗞 Add time off 💿 Day by staff 🗸 🕞 Print 🙀 Export 🛆 Action items 🗸
JF Jenks Foodbank 🗸 🗸	① No Staff	JF Jenks Foodbank
 Calendar Booking page 	2 PM	
용 Customers 응 Staff	3 PM	
Services	4 PM	
Business information	5 PM	
> Services Q ····	6 PM	
✓ staff Q ···· Ø So staff assigned	7 PM	
🥝 🕖 Jenks Foodbank	8 PM	
	9 PM	
	10 PM	
	11 PM	

Next, click on the **intermediate** icon to the right of Service, and then select **Add service** from the dropdown menu that appears.

🐣 Staff			
🖨 Services		4 PM	
器 Business information			
CALENDAR FILTERS		5 PM	
✓ Services	Q .E	6 PM	
Initial consult	Select	all	
O Deleted services	Clear		
∨ Staff	Q Add se	nvice	
🥑 😵 No staff assigned	Manag	ge services	
🕑 🍠 Jenks Foodbank		9 PM	
		10 PM	
		11 PM	

A new **Add service** popup window will appear.

To add a service name, click Service name and start typing (e.g. Food pickup).

k to all calendars				×	Export	▲ Action
Jenks Foodbank	Add service		\frown			
lendar	= Basic details	≞	Service name I			
ooking page	 Availability options Assign staff 	=	Description			
aff	⑦ Custom fields	0	Location			
rvices isiness information	Q Notifications		Add online meeting ③			
IDAR FILTERS	Default scheduling policy ① Default scheduling policy, availability, notifications and staff settings	C	Duration 0 0 days 0 0 h 30 0 min			
ial consult eted services	Publishing options Show this service on the	\$€	Buffer time Price not set			
iff No staff assigned	booking page	Ģ	Notes			
Jenks Foodbank		රි	Maximum number of attendees			
			Discard Save changes			

To add a description of the service, click **Description** and start typing (e.g. Pickup from the Jenks distro center).

k to all calendars				×	Export	Action it
Jenks Foodbank	Add service					
llendar	Basic details	Ē	Service name			
ooking page	Availability options	=	Description			
astomers aff	Assign staffCustom fields	0	Location			
rvices siness information	Q Notifications	Ŷ	Add online meeting ①			
IDAR FILTERS	Default scheduling policy Default scheduling policy, availability, notifications and staff settings	٩	Duration 0 2 days 0 1 h 30 2 min Buffer time			-
ial consult eted services iff	Publishing options Show this service on the booking page	\$E	Price not set			
No staff assigned		9	100153			
Jenks Poodbank		ŝ	Maximum number of attendees 1 ² attendees Discard Save channes	1		
			Discard Shive Changes			

To add a physical location where clients can visit to pick up their food, click **Location** and start typing a physical address e.g. 324 S Main Jenks OK 74037.

Tip: as this will be a pickup from a physical location, you don't need to turn on **Add online** *meeting* (which by default is turned off).

k to all calendars		_		\times	Export	Action i
Jenks Foodbank	Add service					
olendar boking page	 Basic details Availability options 		Service name			
istomers aff	Assign staffCustom fields	0	Location			
rvices isiness information	Q Notifications	, i	Add online meeting (1)			
IDAR FILTERS	Default scheduling policy ① Default scheduling policy, availability, notifications and staff settings	C	Duration 0 û days 0 û h 30 û min			
ial consult eted services	Publishing options Show this service on the booking page	\$€	Buffer time Price not set			
ff No staff assigned		G	Notes			
) Jenks Foodbank		8	Maximum number of attendees			
			Discard Save changes			

To set the duration of the pickup, based on how long you think your clients will need for an appointment, select the duration in days, hours and minutes under **Duration**.

k to all calendars				×	Export	Action in
Jenks Foodbank	Add service					
lendar	Basic details	Ē	Service name			
ooking page astomers	 Availability options Assign staff 	=	Description			
aff	⑦ Custom fields风 Notifications	0	Location Add online vetting ①			
IDAR FILTERS	Default scheduling policy. Default scheduling policy. availability, notifications and staff settings	©	Duration 0			-
ial consult eted services Iff No staff assigned	Publishing options Show this service on the booking page	3E -	Price not set			
Jenks Foodbank		රි	Maximum number of attendees			
			Discard Save changes			

Tip: It's advisable to set a Buffer time for food pickups in case your clients arrive late and their appointment therefore runs a little late. To set a buffer time, turn on the Buffer time toggle and select the time as you did for the duration.

calendars			X Export 🖉 A
s Foodbank	Add service		
	Basic details	🖹 Food Pickup	
bage	C Availability options	Pickup from the Jenks distro center	
5	Assign staff	Fieldp from the zerika share certain	
	⑦ Custom fields	③ 324 S Main Jenks OK 74037	
	Q Notifications	·	
nformation			
ILTERS	Default scheduling policy ① Default scheduling policy.	Duration O	
	availability, notifications and staff settings	Buffet time	
ult	Publishing options	Before After	
rvices	Show this service on the booking page	0 0 h <u>3 🔅</u> min 0 0 h 0 0 min	
		\$€ Price not set ✓	
aff assigned			
Foodbank		₽ Notes	

To set a price for this appointment, click on Price not set and select Free from the dropdown menu that appears.

c to all calendars				×	Export	Action i
Jenks Foodbank	Add service					
	= Basic details	≞	Food Pickup			
lendar loking page	C Availability options	=	Pickup from the Jenks distro center			
istomers	Assign staff	_	Predu nom die zenks disdo center			
aff	⑦ Custom fields	0	324 S Main Jenks OK 74037			
rvices	Q Notifications	0	Add online meeting			
siness information		0				
DAR FILTERS	Default scheduling policy ① Default scheduling policy, availability, notifications and staff settings	C	Duration 0 0 days 0 0 h 30 0 min			
al consult	Publishing options		Before After			
eted services ff No staff assigned I Jenks Foodbank	Show this service on the booking page	\$€ ₽	0 h 10 î min 0 h 10 řřin Price not set v Notes			
			Discard Save changes	1		

To add notes, click on **Notes** and start typing a short message which your clients will see when scheduling their bookings.

k to all calendars				\times	Export	Action i
Jenks Foodbank	Add service					
lendar	Basic details	Ē	Service name I			
ooking page	C Availability options	=	Description			
istomers	Assign staff					
aff	⑦ Custom fields	\odot	Location			
rvices	Q Notifications	\sim	Add online meeting ①			
isiness information		~				
IDAR FILTERS	Default scheduling policy ① Default scheduling policy, availability, notifications and	C	Duration 0 ¹ / ₂ days 0 ¹ / ₂ h 30 ¹ / ₂ min			
rvices	staff settings		Buffer time			
ial consult	Publishing options	\$€	Price not set			
eted services	Show this service on the booking page	φc	Price not set			
ff No staff assigned		Ģ	Notes			
Jenks Foodbank		00				
		8	Maximum number of attendees			
			Discard Sover changed			

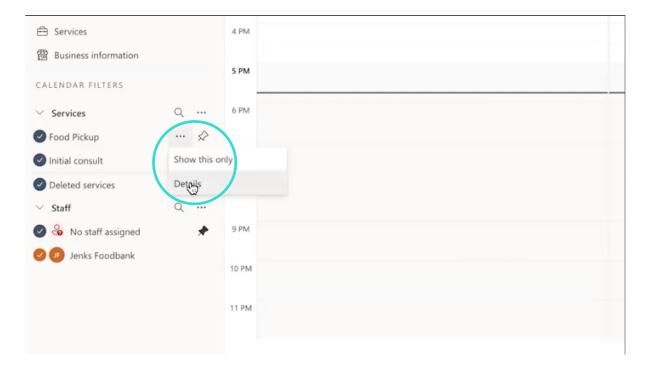
Click Save changes to proceed.

k to all calendars				×	Export	Action ite
Jenks Foodbank	Add service					
	🚍 Basic details	≙	Food Pickup			
alendar boking page	Availability options	_	Pickup from the Jenks distro center			
ustomers	S Assign staff	_	Pickup iron die zenks distro center			
aff	⑦ Custom fields	0	324 S Main Jenks OK 74037			
rvices	Q Notifications	\lor	Add online meeting			
usiness information			Duration			
IDAR FILTERS	Default scheduling policy ① Default scheduling policy, availability, notifications and staff settings	C	0 🗘 days 0 🗘 h 30 🗘 min			
ial consult	Publishing options		Buffer time Before After			
eted services	Show this service on the booking page		0 0 h 10 0 min 0 0 h 10 min			
aff		\$€	Free 🗸			
No staff assigned		P	Notes			
Jenks Foodbank						
			\sim			
			Discard Save c	hange		

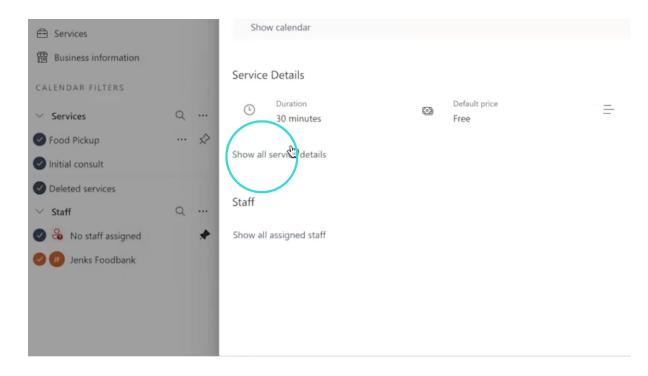
Your new service (which, for example, may be called Food Pickup) will now appear under the **Services** tab.

← → C	0 8 =	https://outlook.office.com/bookings	/calendar		☆	0	🐺 🦑 🛙		
					Try t	the new Bookings 🤇	•		(
← Back to all calendars		⊕ New booking ☐ Today ←	$ ightarrow$ August 30, 2022 \vee	Add time off	$\bigin{array}{c} \bigin{array}{c} \big$	🕞 Print 🛚 🛍 Expo	ort 🛆 Action	n items	
JF Jenks Foodbank	~	() No Staff		JF Jenks	Foodbank				
Calendar									
Booking page		2 PM							
图 Customers		3 PM							
🖧 Staff									
🛱 Services		4 PM							
Business information									
CALENDAR FILTERS		5 PM							
Services	Q	6 PM							
Food Pickup	Ś	7 PM							
Deleted services		8 PM							
∨ Staff	Q								
🖉 🗞 No staff assigned	*	9 PM							
🕑 🕖 Jenks Foodbank		10 PM							
		11 PM							

To review and edit any details regarding your newly created service, click the icon next to your new service (which, for example, may be called Food Pickup). Then click **Details**.



A new popup screen will appear called **Service Details**. Click on **Show all service details** to review and edit the service.



Click on **Overview, Service details, Calendar and Availability,** and **Staff** tabs to review and information related to those aspects of the service. Click on **Edit service** to make any edits.

→ C	ΟB	ë≅ ⊗ https://outlook. office.com /bookings/calendar	☆	V 🐺 🎸 🖾
ck to all calendars Jenks Foodbank alendar ooking page	~	Edit service Book appointment		× ¹ ew Bookings
lustomers		No upcoming appointments		
taff				
ervices		Show calendar	< >	
NDAR FILTERS		Service Details		
ervices	Q	O Duration Default price = Description 30 minutes Free Pickup from the Jenk	·s	
od Pickup tial consult	🖈	Show all service details		
leted services	Q	Staff		
 No staff assigned Jenks Foodbank 	*	Show all assigned staff		

To make a booking service publicly available to anyone, click Booking page.

← → C		https://outlook.office.com/bookings/calendar	☆ 	S 🔮 🏾 S 🗉
			Try the new Bo	okings 💽 🚳 ? (J
← Back to all calendars		⊕ New booking ☐ Today ← → August 30, 2022 ∨	🔓 Add time off 🛛 Day by staff 🗸 🕞 Print	🗱 Export 🖉 Action items 🗸
JF Jenks Foodbank	~	() No Staff	JF Jenks Foodbank	
Cafendar Geoking page		2 PM		
3 Customers 양 Staff		3 PM		
 Services Business information 		4 PM		
CALENDAR FILTERS		5 PM		
✓ Services	Q	6 PM		
Food Pickup Initial consult	🖒	7 PM		
 Deleted services Staff 	Q	8 PM		
No staff assigned	*	9 PM		
🥑 🥵 Jenks Foodbank		10 PM		
		11 PM		

Next, under **Configure booking page**, click **No self-service** and select then click **Available to anyone** from the dropdown menu. This will enable anyone to view and make online bookings through your calendar, once you've shared the booking page link.

		~		X Discard			
nk	~	Co	nfigure l	booking page			
				No self-service Don't publish a self-servi	ice booking page for customers	\sim	
			-	No self-service Don't publish a self-servi	ice booking page for customers	-	
'n		Μŧ		Available to people in your organization People in your organization can book with an internal-only self-service page			
		(Available to anyone people on the internet ca	an book with a public self-service page	~	
		QeQ	Custome	er data usage consent	Add a personal data collection and usage consent message to your page	~	
		G	Default s	cheduling policy	Default scheduling policy, availability, notifications and staff settings	~	

Tips: There are various optional customizations you can activate at this stage under *Manage your booking page*. This includes changing your **Business page access control**, *Customer data usage consent*, *Default scheduling policy*, *Region and time zone settings* and *Customize your page* to include your organization's branding.

← Back to all calendars	✓ Save X Discard		
JF Jenks Foodbank ~	Configure booking page		
Booking page	Available to anyone People on the internet can boo	k with a public self-service page	~
送 Customers 양 Staff	Manage your booking page		
E Services	Manage your booking page		
器 Business information	Business page access control	Includes requirement of Office 365 control, search engine indexing	~
	E Customer data usage consent	Add a personal data collection and usage consent message to your page	~
	Co Default scheduling policy	Default scheduling policy, availability, notifications and staff settings	~
	S Customize your page	Customize the bookings page to go with the brand of your organization.	~
	Region and time zone settings	Choose your booking page language and time zone settings	~

Next, click Save.

← Back to all calendars JF Jenks Foodbank ∨	× Spee × Discard		
🗊 Calendar	Configure booking page		
Booking page	Available to anyone People on the internet can bo	ok with a public self-service page	~
Customers			
😂 Staff	Manage your booking page		
🛱 Services	Manage your booking page	-	
圈 Business information	Business page access control	Includes requirement of Office 365 control, search engine indexing	~
	🔛 Customer data usage consent	Add a personal data collection and usage consent message to your page	~
	Default scheduling policy	Default scheduling policy, availability, notifications and staff settings	~
	S ^C Customize your page	Customize the bookings page to go with the brand of your organization.	~
	Region and time zone settings	Choose your booking page language and time zone settings	~

Now your booking page link will appear under **Your booking page:**. Click on the **https://outlook.office365.com web page link** to view the booking page in real time.

← Back to all calendars JF Jenks Foodbank ~ © Calendar Booking page Customers	Configure booking page Available to anyone People on the internet can booking	ok with a public self-service page	~		
응 Staff 合 Services 雷 Business information	Manage your booking page	Includes any impact of Office 201			
	② Customer data usage consent	Add a personal data collection and usage consent message to your page	~		
	C Default scheduling policy	Default scheduling policy, availability, notifications and staff settings Customize the bookings page to go with the brand of your organization.	~		
	Region and time zone settings	Choose your booking page language and time zone settings	~		

It may look something like this example for Jenks Food Bank. This is the public booking page that your clients will see and use to schedule their food pickups.

$\leftarrow \rightarrow \circ$	O A https://or	utlook. off	ice365.c	om/owa/	calendar,	JenksFo	odbank1(@M365x942167.onmicrosoft.com/bookings/	☆		♥ ©	æ	»	=
						Jer								
	Select service													
	Initial consult 1 hour			€ 🕕			Food Pickup 30 minutes Free	6)					
						k		riee						
							5	Select time						
	<	> Aug	ust 202	2										
	Su	Mo	Tu	We	Th	Fr	Sa	Select a service and date to see ava	ilable times.					
		1		3.	4	5	6							
	7	8	9				13							
	14		16		18	19								
		22		24	25	26	27							
	28	29												

Send an invitation for scheduling a pickup

To send an invitation to your clients so that they can schedule a food pickup online, you need to send clients the link to the public booking page that you've created.

To copy the link to the scheduling web page, click and highlight the URL (which starts with https://outlook.office365.com), then copy the URL (to copy press Ctrl + C (on Windows) or Command + C (on Mac).

$\leftarrow \rightarrow \circ$	https://o	utlook. off i	ice365.c	om/owa/d	alendar/	JenksFo	odbank1	©M365x942167.onmicrosoft.com/bookings/ ☆			2		≫ ≡
						Jer	nks	Foodbank					
	Select service												
	Initial consult			€ 1			Food Pickup	0					
	1 hour					k		30 minutes Free					
						æ							
							:	Select time					
	<	> Aua	ust 202	2									
	Su	Mo	Tu	We	Th	Fr	Sa	Select a service and date to see available times.					
		1	2	3	4	5	6						
	7	8											
				24	25	26							
	28	29											
		8 15 22	9 16 23	10 17 24	11 18	12 19	13 20						

Next, **open Outlook** to draft an email to your clients in which you'll paste this bookings URL link. Draft the email to send to your clients. Your email may look something like this.

→ C	https://outlook.office.com/mail/	*	🖂 🐺 🍇 🔯 » 📑								
🔀 Contoso Electronics	Outlook 🔎 Search		₽ D © ? < ³ (F)								
New message		▷ Send 🔋 Attach ~ 🔯 Sensitivity ~ 📋 Discard …	C .								
✓ Favorites	⊘ Focused Other	To kmulhall@techsoup.org	Bcc								
🖂 Inbox 1	JF Jenks Foodbank Your Jenks Foodbank bookin 5:41 PM	Cc									
➢ Sent Items	Hello Jenks Foodbank, You have create	Schedule Your Foodbank Pick Up									
		Hi,									
Add favorite Folders		To schedule a time for food pickup at the Jenks Foodbank please click on the link below:									
🖂 Inbox 1		Jenks Foodbank Calendar									
🔊 Drafts 1		Thanks,									
➢ Sent Items											
Deleted Items											
			≣ ⊒ +≣								
		Send V Discard 🕴 📾 😥 🧐 🍌 🔗 🔒 …	Draft saved at 5:55 PM								
Conversation											
Create new fol											
✓ Groups											
	Contoso Electronics Image: New message Favorites Image: New message Parorites Onders Polarits 1 Add favorite Polarits 1 Polarits 1 <th< th=""><th>Contoso Electronics Outlook Search New message Search Inbox 1 Sent Items Jenks Foodbank Drafts 1 Drafts 1 Sent Items Search Inbox 1 Sent Items Search Inbox 1 Search Search Search Search</th><th>Contoso Electronics Outlook Contoso Electronics Notes Inbox Inbox <</th></th<>	Contoso Electronics Outlook Search New message Search Inbox 1 Sent Items Jenks Foodbank Drafts 1 Drafts 1 Sent Items Search Inbox 1 Sent Items Search Inbox 1 Search Search Search Search	Contoso Electronics Outlook Contoso Electronics Notes Inbox Inbox <								

To add a hyperlink to your foodbank or food pantry booking calendar, select the text (in this example we've selected Jenks Foodbank Calendar) by highlighting it.

	▷ Send 🕼 Attach ~ 🔯 Sensitivity ~ 🛍 Discard …	ď
d Other = Filter odbank ks Foodbank bookin 5:41 PM iks Foodbank, You have create	To kmulhall@techsoup.org Cc Schedule Your Foodbank Pick Up	Bcc
	Hi, To schedule a time for $1 \ Calibri \ 12 \ B \ I \ Calibri \ A \ A \ B \ I \ A \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ A \ B \ B$	it 5:55 PM

To insert the hyperlink, click on the ^{CD} Insert link icon and click Insert link from the dropdown menu.

	▷ Send 🔋 Attach ~ 🐼 Sensitivity ~ 🛍 Discard …	Ľ
d Other = Filter	To kmulhall@techsoup.org	Bcc
odbank Iks Foodbank bookin 5:41 PM nks Foodbank, You have create	Cc Schedule Your Foodbank Pick Up	
	Hi, To schedule a time for food pickup at the Jenks Foodbank please click on the link below: Jenks Foodbank Calendar Thanks, The Team at Jenks ✓ Browse cloud locations ✓ Upload and share ✓ Lipsert link (#+K) ✓ Calibri ✓ 12 ✓ B I U ∠ ✓ A → D = = + = + = Send ✓ Discard @ @ @ @ @ @ @ @ @ M Draft saved at	5:55 PM

An **Insert link** popup screen will appear. **To paste the hyperlink** click on the **Web address (URL)** box and right click on your mouse or keypad to bring up the dropdown menu. Click **Paste** to insert the link.

1	JF	Focused Othe Jenks Foodbank Your Jenks Foodba Hello Jenks Foodba	ink bookin		To Cc Schedule	kmulhall@tech Your Foodbank F								
1			Insert lin Display as Jenks Foodl Web addres	oank Calendar s (URL)	Undo Redo Cut			ок	Cance	ank pleas	e click d	on the	link be	elow:
					Copy Pas Delete Select All Add a Keyword 1 Check Spelling	for this Search	12 ard		I U •					+E →I

Your text will now appear in blue as the example below, indicating that there's a hyperlink.

	🏱 Send 🔋 Attach 🗸 📓 Sensitivity 🗸 🛅 Discard …									
d Other = Filter	To kmulhall@techsoup.org	Bcc								
odbank iks Foodbank bookin 5:41 PM	Cc									
nks Foodbank, You have create	Schedule Your Foodbank Pick Up									
	To schedule a time for food pickup at the Jenks Foodbank please click on the link below: Jenks Foodbank Calendar Thanks, The Team at Jenks I I I I I I I I	at 5:58 PM								

To send your email, click Send.

	▷ Send 🔋 Attach ~ 🚿 Sensitivity ~ 🗐 Discard …	്
d Other = Filte	To kmulhall@techsoup.org	Bcc
odbank Iks Foodbank bookin 5:41 PM nks Foodbank, You have create	Cc	
	Schedule Your Foodbank Pick Up	
	Hi, To schedule a time for food pickup at the Jenks Foodbank please click on the link below: Jenks Foodbank Calendar Thanks, The Team at Jenks	
	$\begin{array}{c c c c c c c c c c c c c c c c c c c $:58 PM

Tip: You can insert the URL link into an email, a newsletter, a mail list, a mail merge tool, or a social media post to share it publicly with your clients so that they can start scheduling their pickups.

You can also use the booking webpage to manually schedule an appointment on behalf of a client if needed (for example if they have limited or no internet access).

Additional Resources 🧖

Training + Services 🎓

- Microsoft 365 Bootcamp for Nonprofits. This TechSoup Course is available at no cost to TechSoup Quad members. Learn more about Quad.
- 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 Microsoft 365? We recommend you start with this blog 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.