

*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.

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## 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 [the program page on TechSoup](#) 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 [Microsoft Nonprofit portal](#).

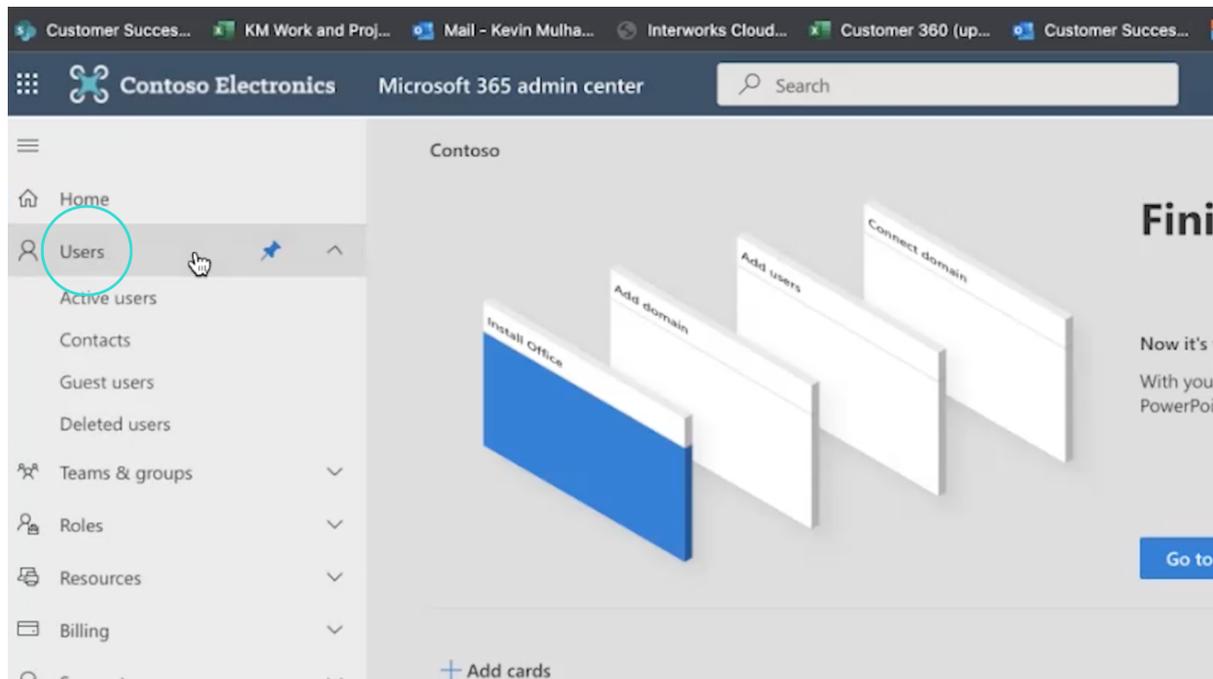
You'll also need to ensure that you're properly licensed to use the Microsoft 365 Bookings app (which requires you to have a Microsoft 365 Business Basic license or higher).

**To get started** using the [Microsoft 365 Bookings app](#), **sign in to the [Microsoft 365 admin portal](#)** using your global admin account credentials.

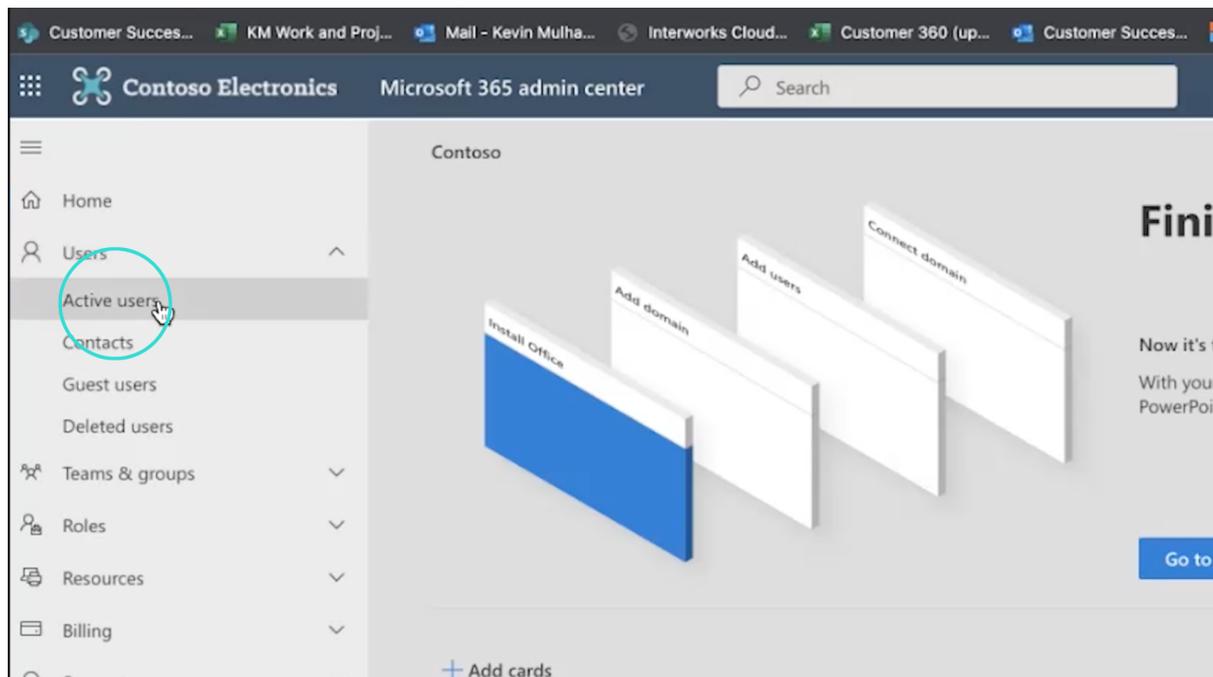
You'll then need to create a new user and assign a license to the new user in the Microsoft 365 admin portal before you start using the Bookings app.

Create a new user in Microsoft 365

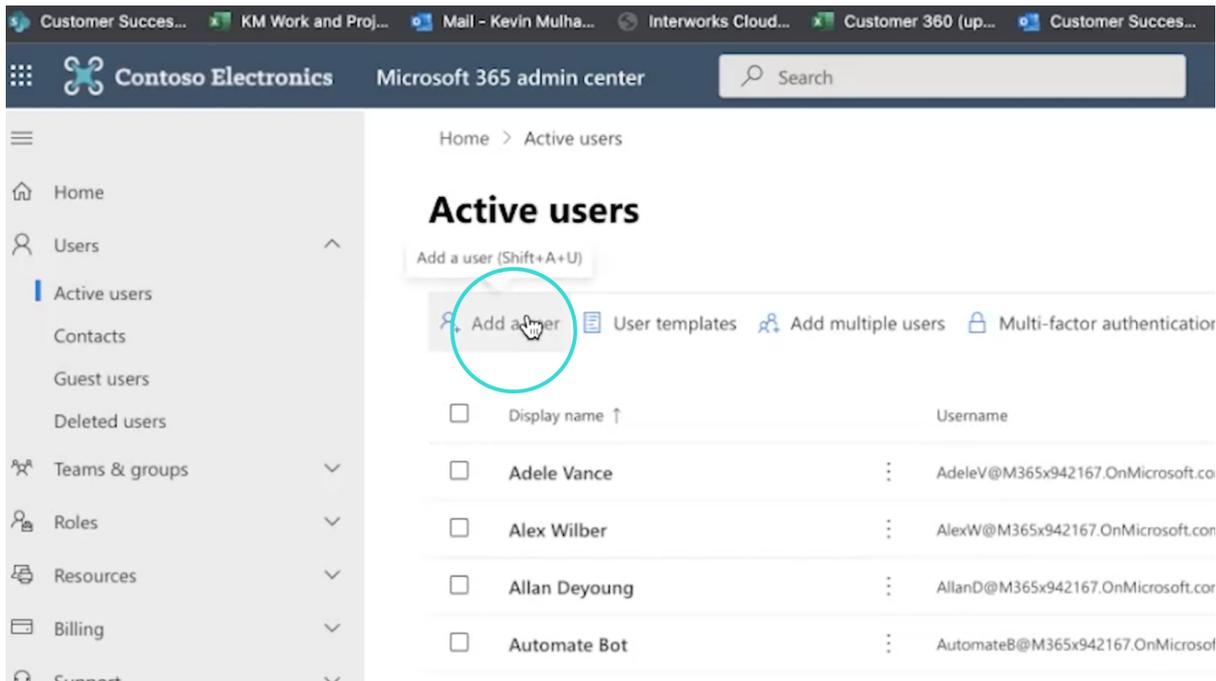
**To create a new Microsoft 365 user**, open the Microsoft 365 admin portal and click on **Users** on the left side menu.



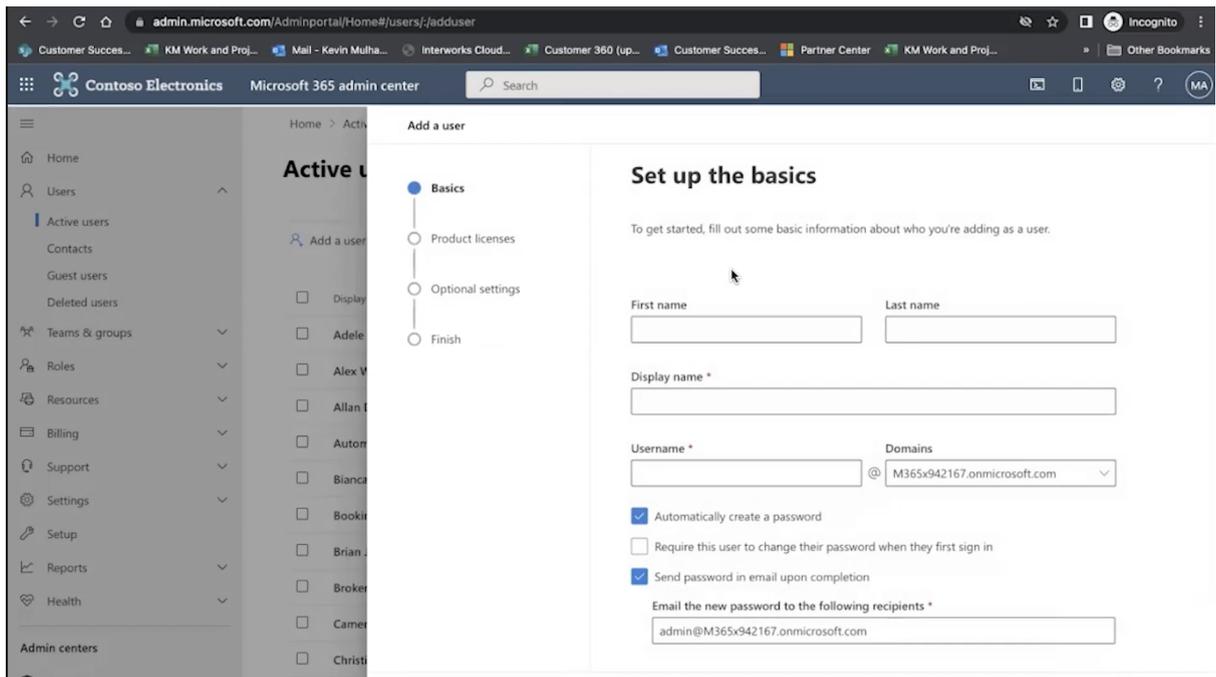
Click on **Active users** from the dropdown menu that appears.



Click **Add a user**.



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



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.

The screenshot shows a user creation form with the following elements:

- A progress indicator on the left with a circle and the word "Finish".
- Two input fields: "First name" containing "Jenks" and "Last name" containing "Foodbank".
- A "Display name \*" field containing "Jenks Foodbank".
- A "Username \*" field containing "jenksfoodbank" and a "Domains" dropdown menu showing "M365x942167.onmicrosoft.com".
- Three checkboxes:
  - Automatically create a password
  - Require this user to change their password when they first sign in
  - Send password in email upon completion
- An "Email the new password to the following recipients \*" field containing "admin@M365x942167.onmicrosoft.com".
- At the bottom, a blue "Next" button and a grey "Can" button.

**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 \***.

○ Finish

First name: Jenks      Last name: Foodbank

Display name \*: Jenks Foodbank

Username \*: jensfoodbank      Domains: M365x942167.onmicrosoft.com

Automatically create a password  
 Require this user to change their password when they first sign in  
 Send password in email upon completion

Email the new password to the following recipients \*  
admin@M365x942167.onmicrosoft.com

Next      Can

Then click **Next**.

○ Finish

First name: Jenks      Last name: Foodbank

Display name \*: Jenks Foodbank

Username \*: jensfoodbank      Domains: M365x942167.onmicrosoft.com

Automatically create a password  
 Require this user to change their password when they first sign in  
 Send password in email upon completion

Email the new password to the following recipients \*  
admin@M365x942167.onmicrosoft.com

Next      Can

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.

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 Cancel

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.

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

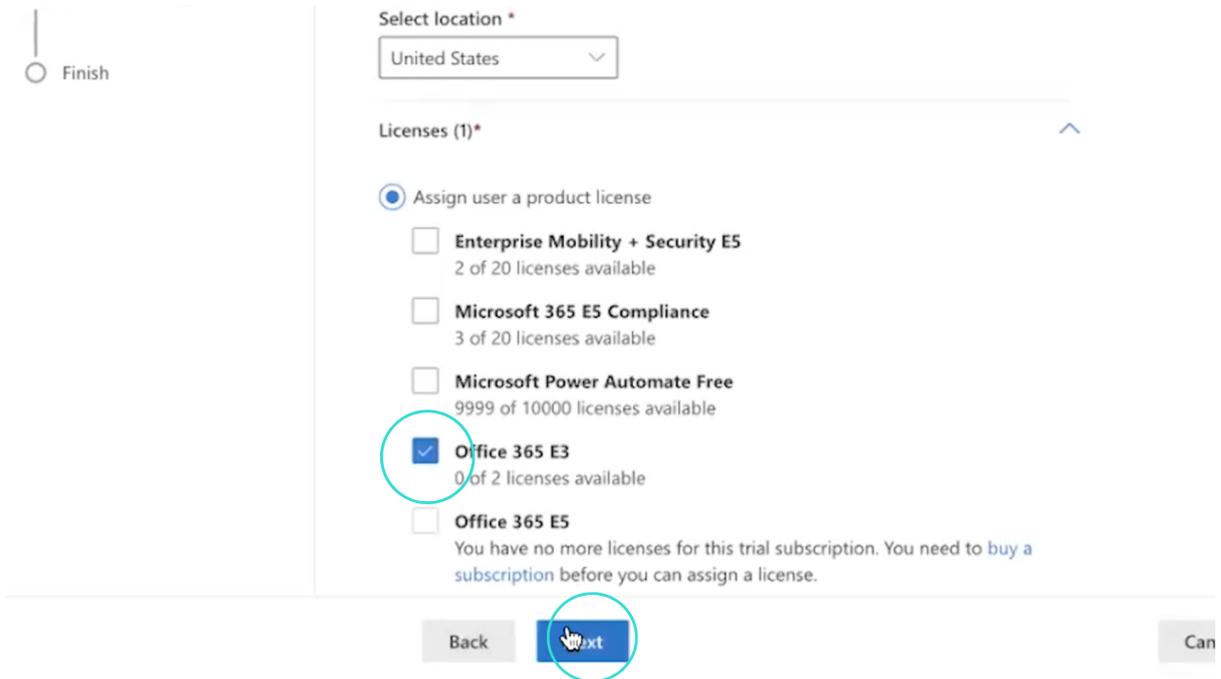
Microsoft Power Automate Free  
9999 of 10000 licenses available

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.

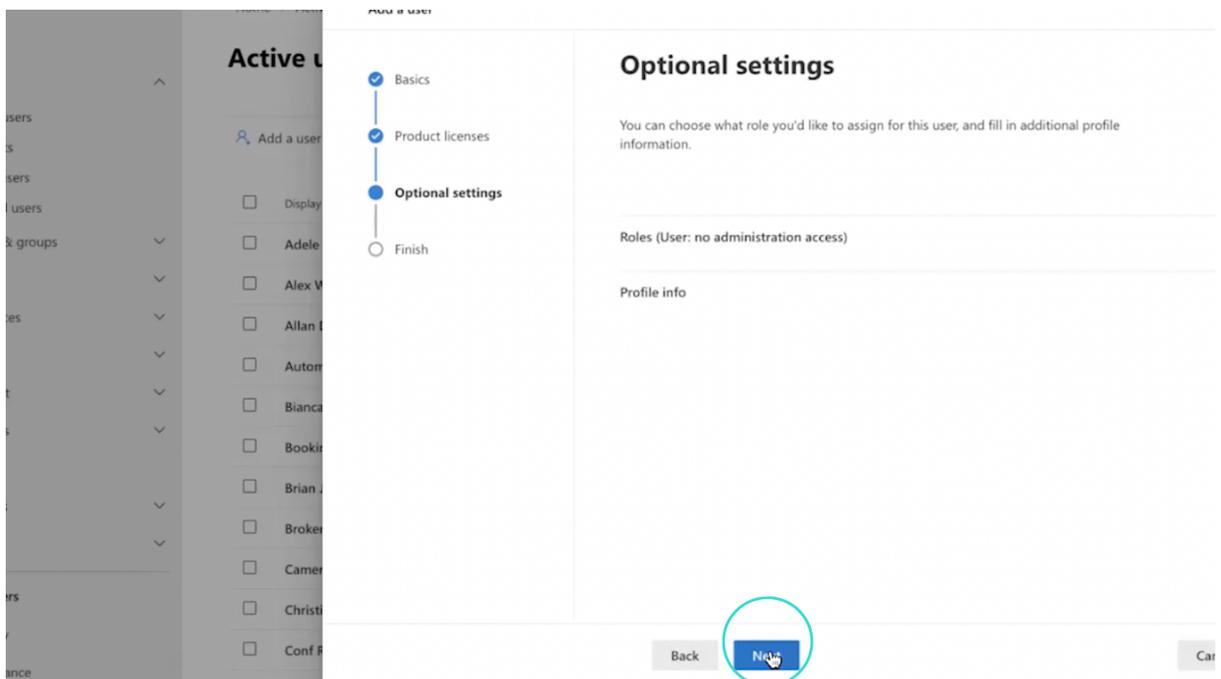
Back Next Cancel

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

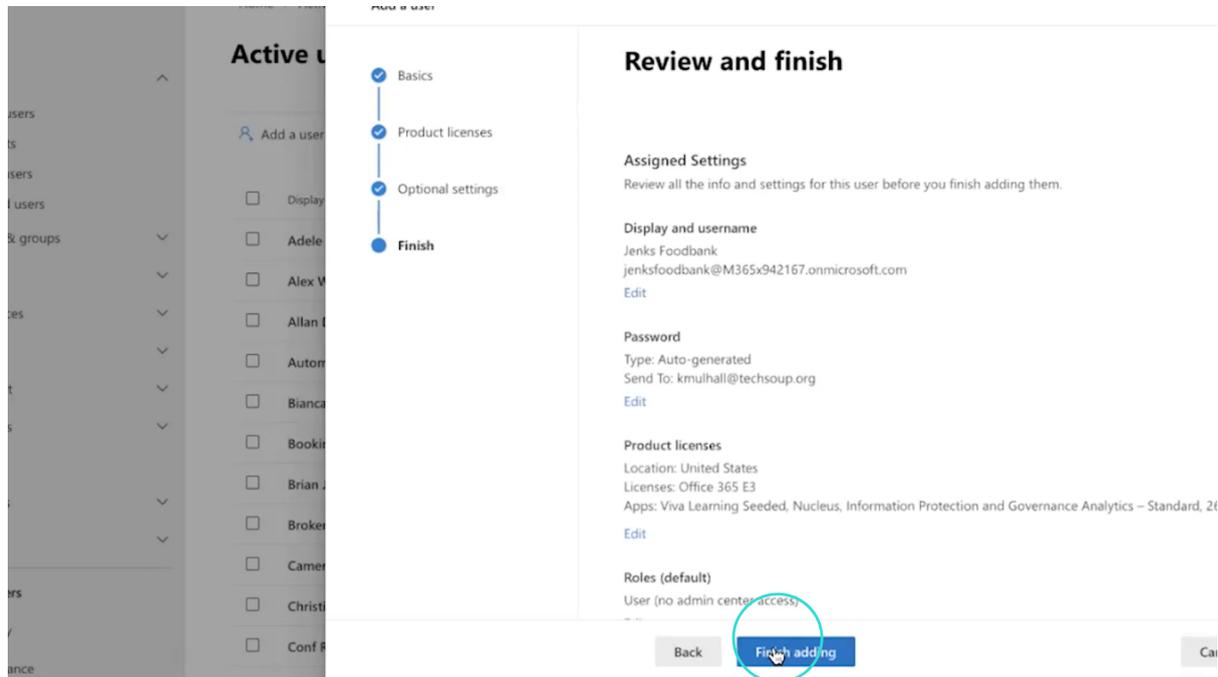


**Note:** You'll need to have the Microsoft 365 Business Standard license or higher to use the Bookings app feature.

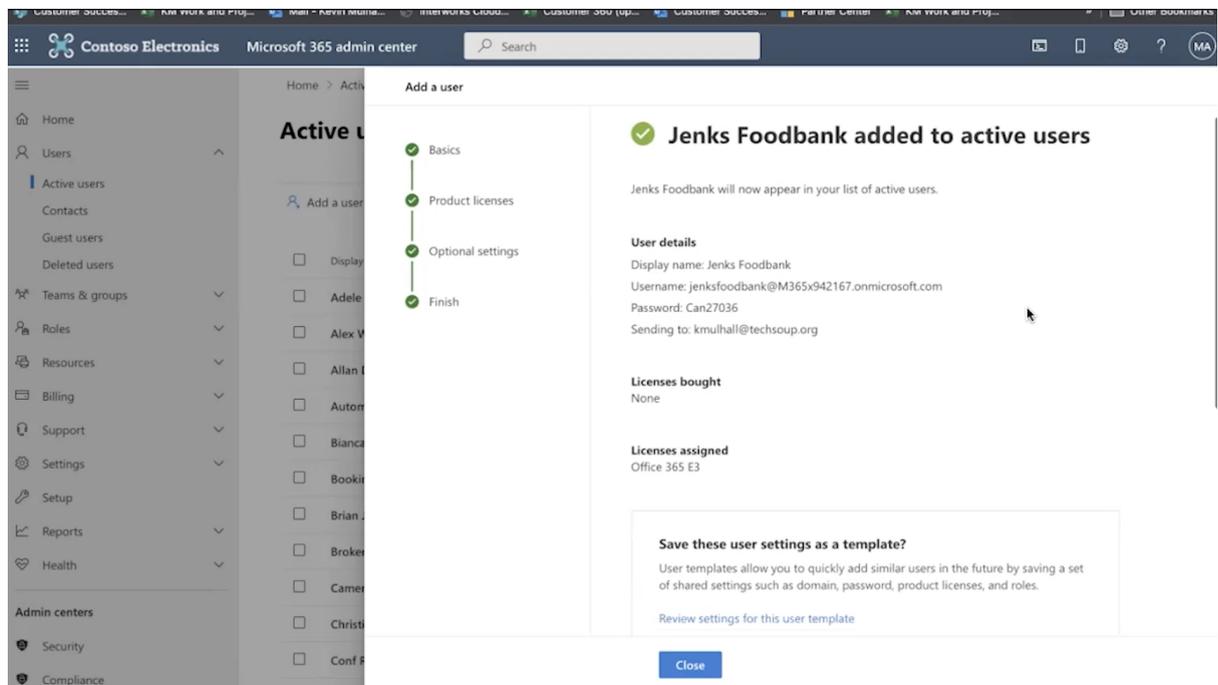
A new **Optional settings** popup screen will now appear. Here you have the option to provide information that's part of role-based access control, where you can set higher levels of permission for user accounts if you would like. Either leave the default settings or edit them and then click on **Next**.



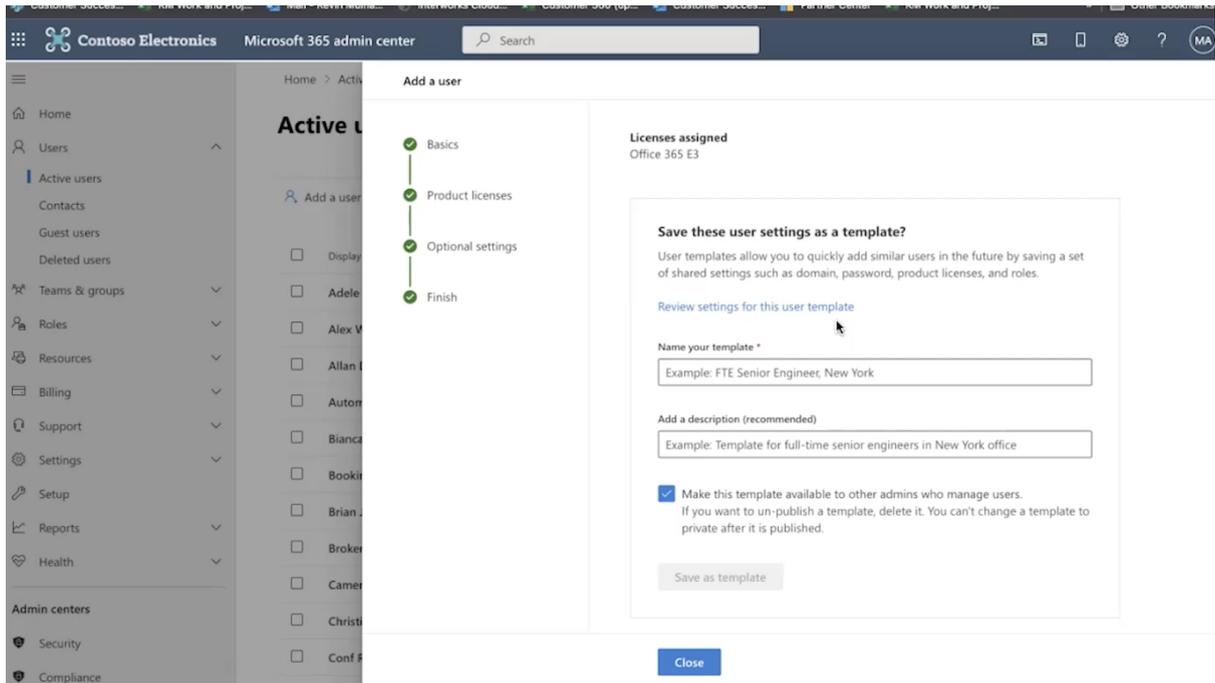
A new **Review and finish** popup screen will appear. Here you can review all the information you have provided to check it's correct and accurate, and you have the opportunity to edit any information. If everything looks fine, click **Finish adding**.



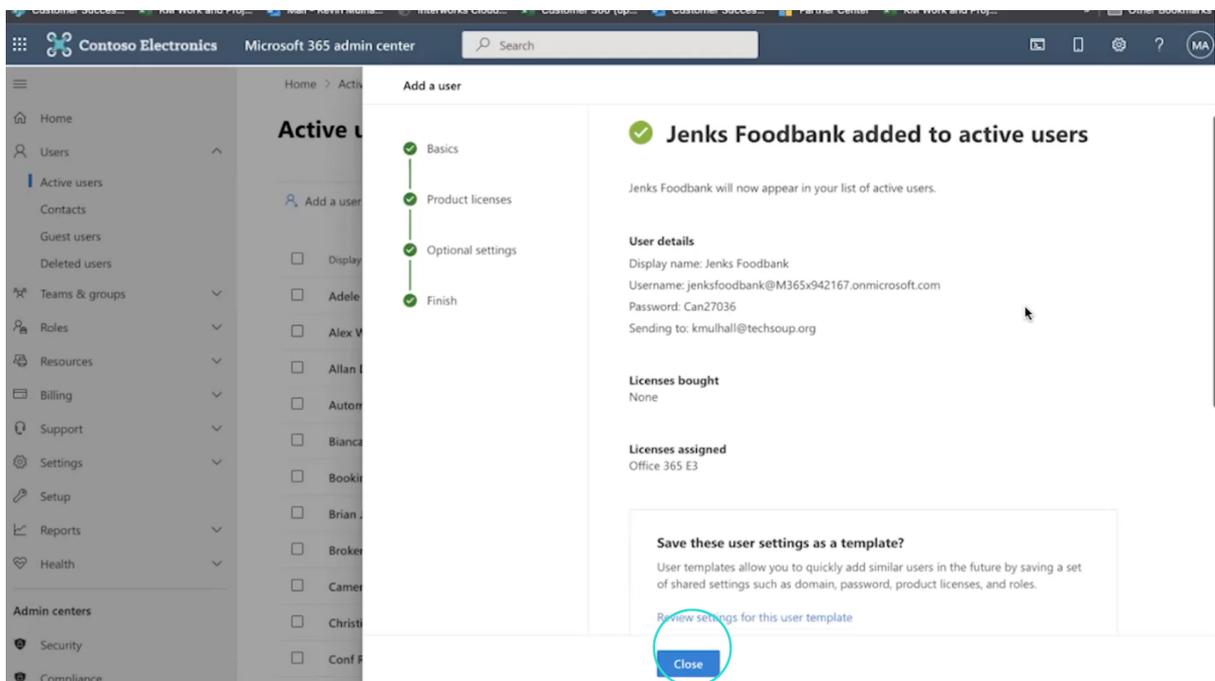
A new popup screen will appear confirming the name of your new user as being added to active users. This is an example of what this screen may look like.



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.

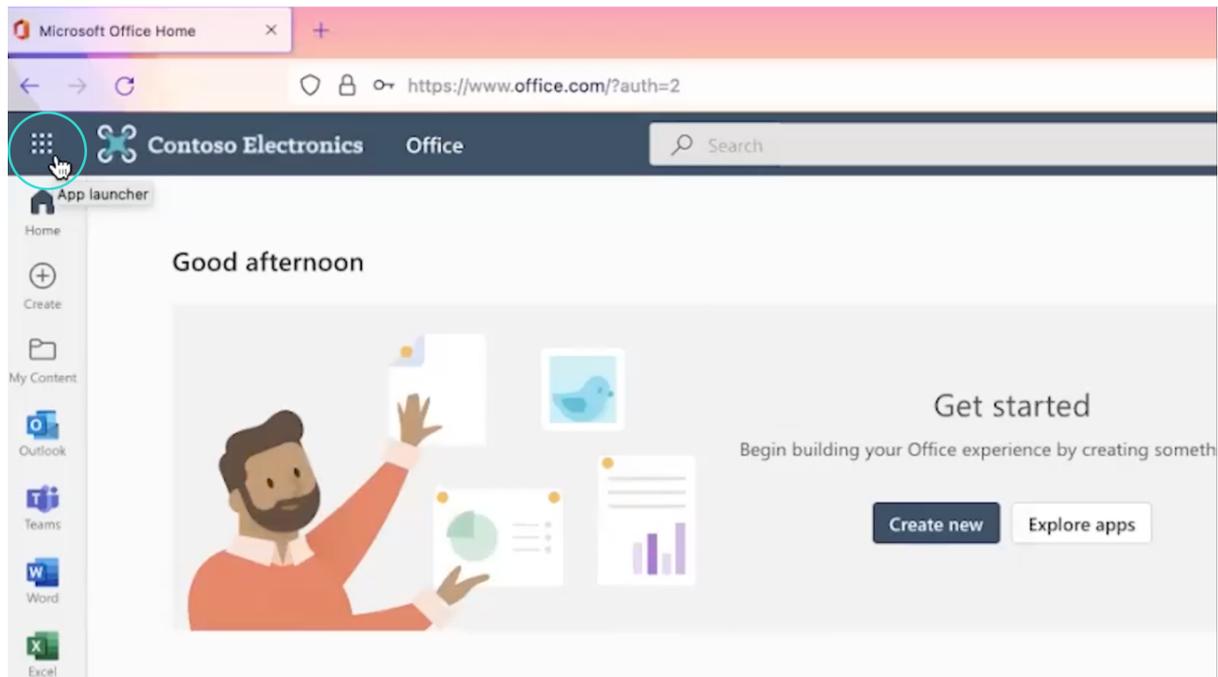


Click **Close**. You have now successfully created a new user and assigned them an active license.

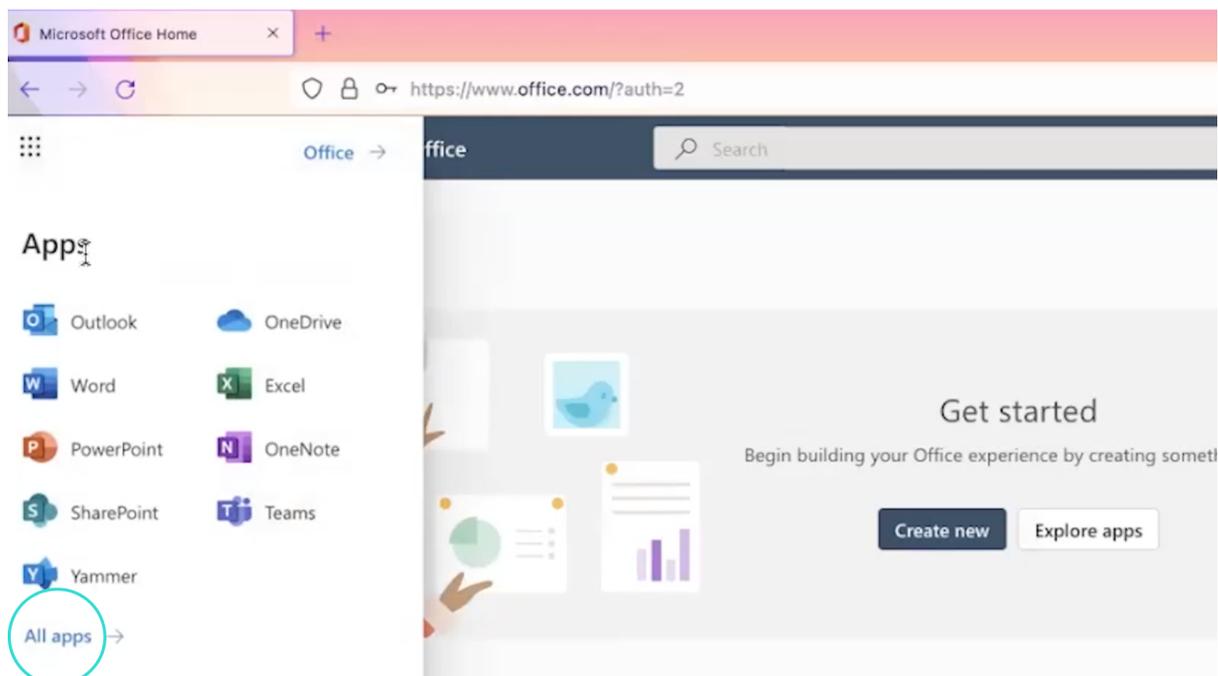


Create a pickup calendar using the Microsoft 365 Bookings app  
The Booking app is an online Microsoft 365 service, so you won't need to download the app.  
**To access the app, log into your [www.office.com](http://www.office.com) account** (with your username and password). Click on the  **App launcher** icon.

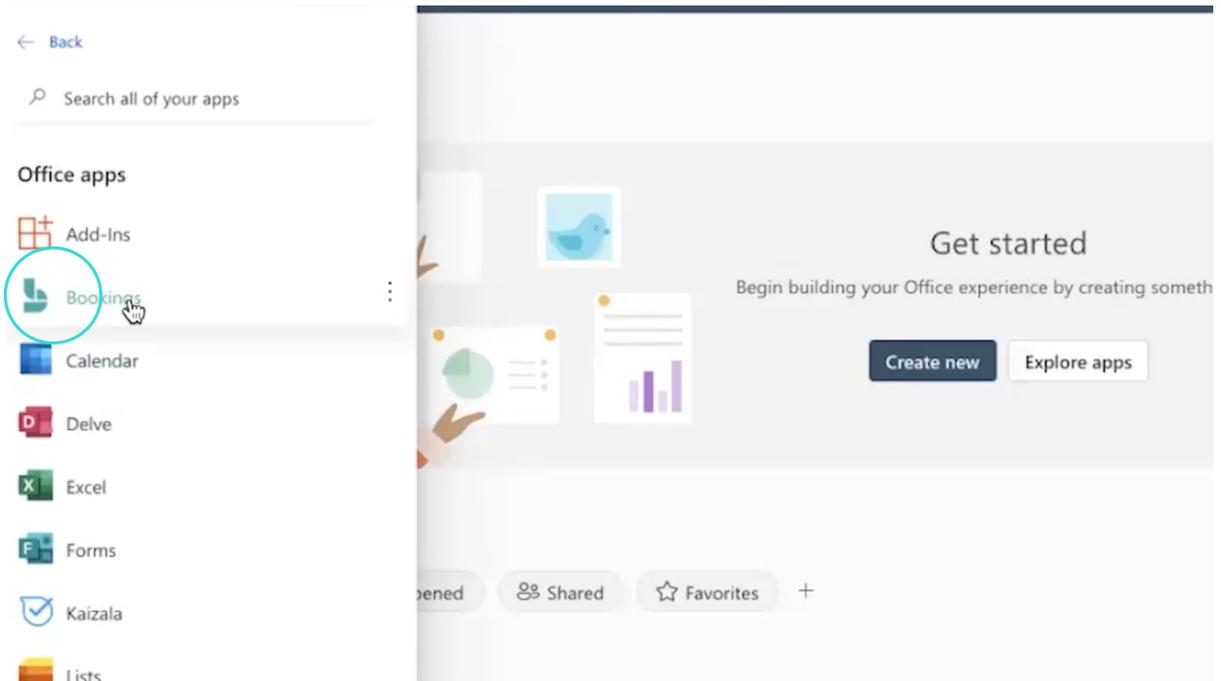
**Tip:** There is also a companion app if you're running [iOS](#) or [Android](#) (and you'll still need Office 365 Business Standard or higher subscription to access it).



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

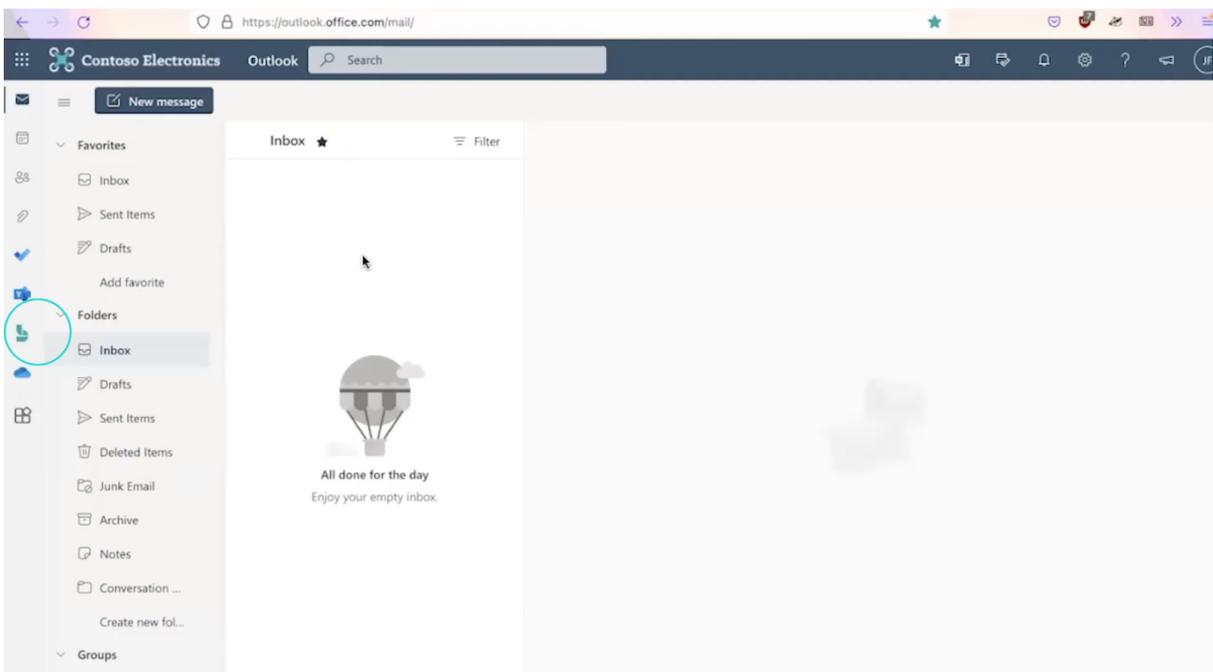


A new screen will appear showing all the available apps. Click the **Bookings** app.

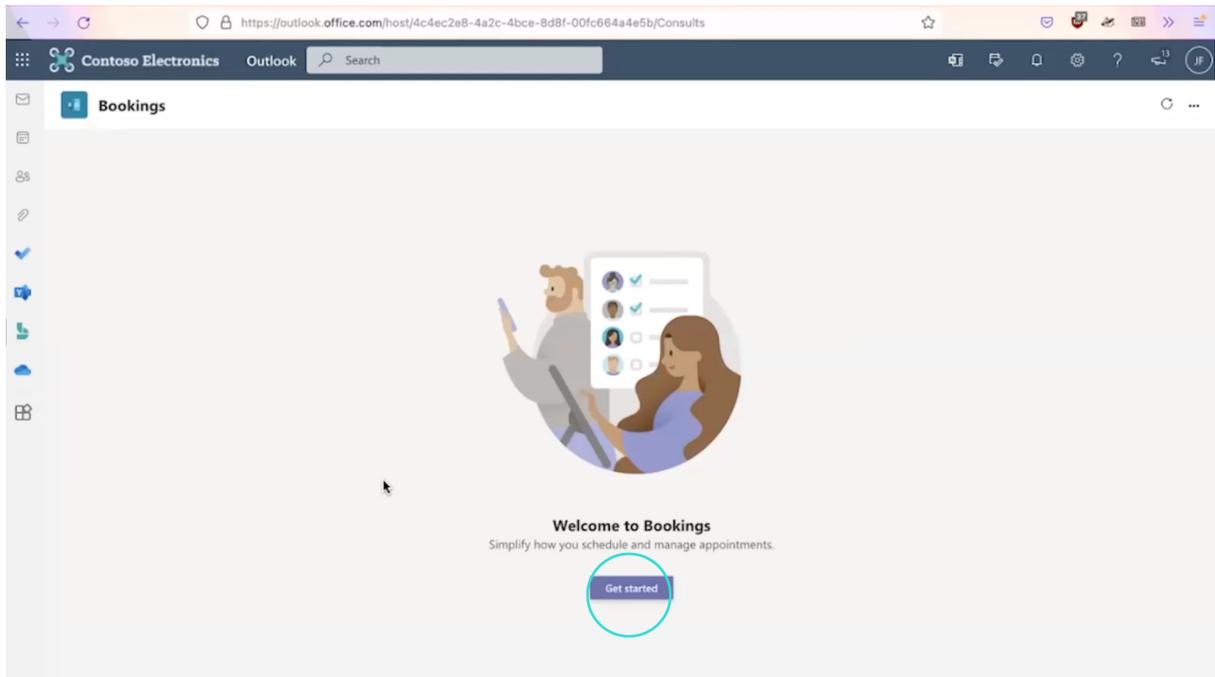


When you first launch an account, it will connect with the Outlook calendar associated with that account. You'll automatically be connected with Outlook and redirected to Outlook.

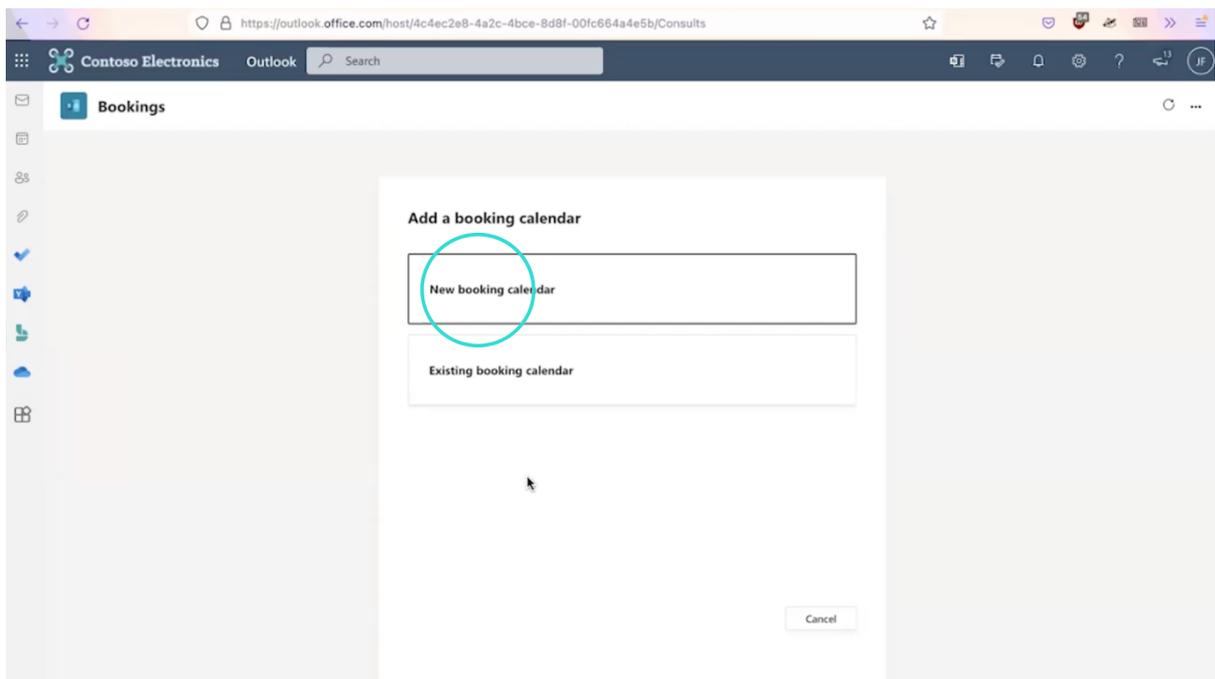
Click on the  **Bookings** app icon which directs you to the Bookings app.



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**.



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).

https://outlook.office.com/host/4c4ec2e8-4a2c-4bce-Bd8f-00fc664a4e5b/Consults

Contoso Electronics Outlook Search

Bookings

### 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)

Business or department name \*

Type a business name

Business type \*

Select business type

Send attendee responses to

Type an email address

Business phone number

Type a phone number

< Back Cancel Save

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**.

https://outlook.office.com/host/4c4ec2e8-4a2c-4bce-Bd8f-00fc664a4e5b/Consults

Contoso Electronics Outlook Search

Bookings

### 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)

Business or department name \*

Type a business name

Business type \*

Select business type

Send attendee responses to

Type an email address

Business phone number

Type a phone number

< Back Cancel Save

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 or department name \*

**Jenks Foodbank**

Business type \*

Other

Send attendee responses to

Type an email address

Send attendee responses to

Business phone number

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 or department name \*

**Jenks Foodbank**

Business type \*

Other

Send attendee responses to

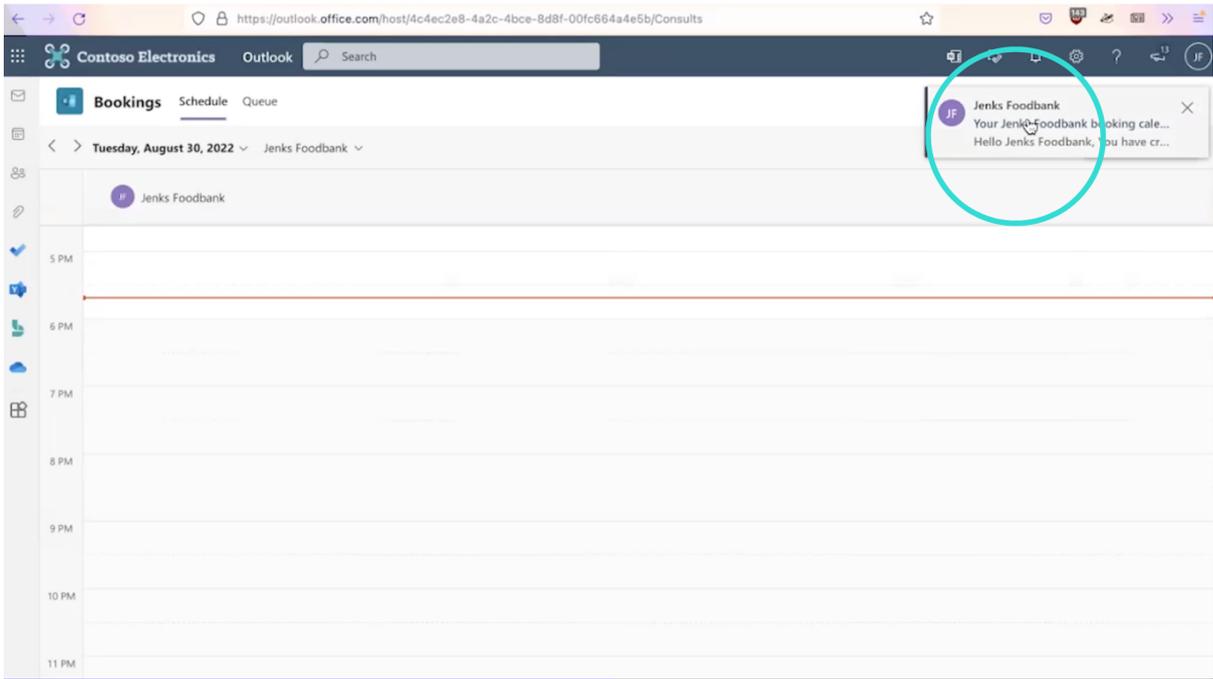
kmulhalljr@techsoup.org

Business phone number

Type a phone number

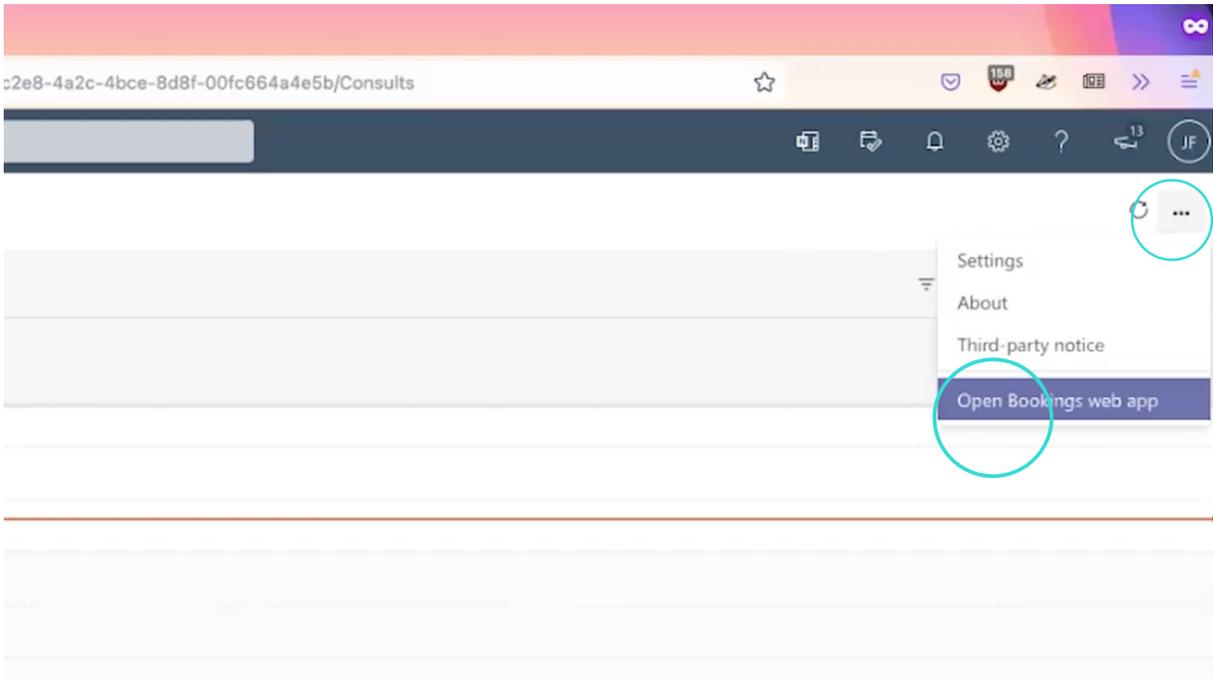
< Back Cancel Save

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.

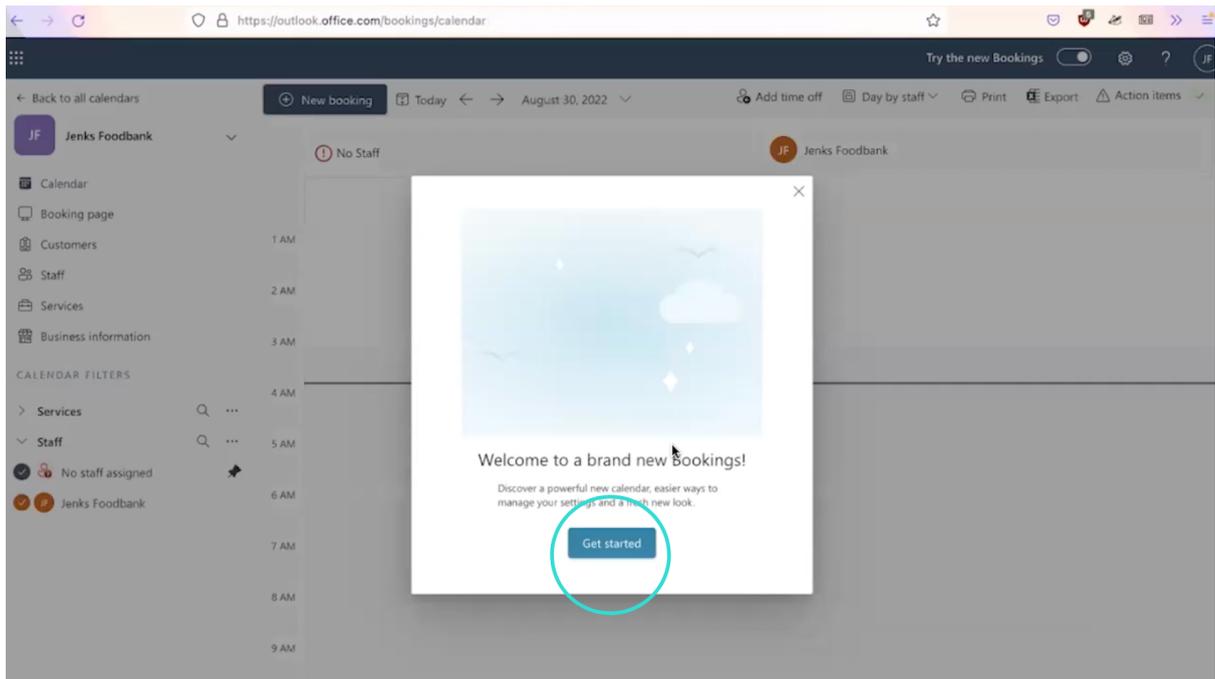


Create a new service for your Bookings calendar

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

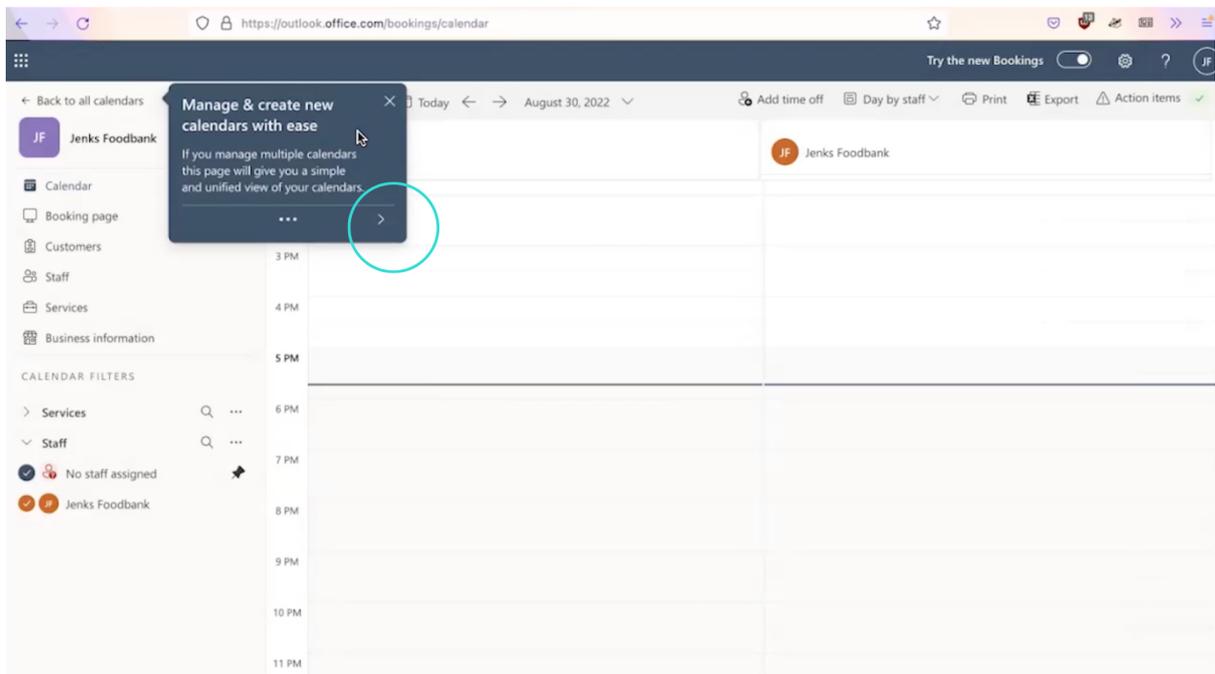


The Bookings web app will open automatically. Click **Get started**.

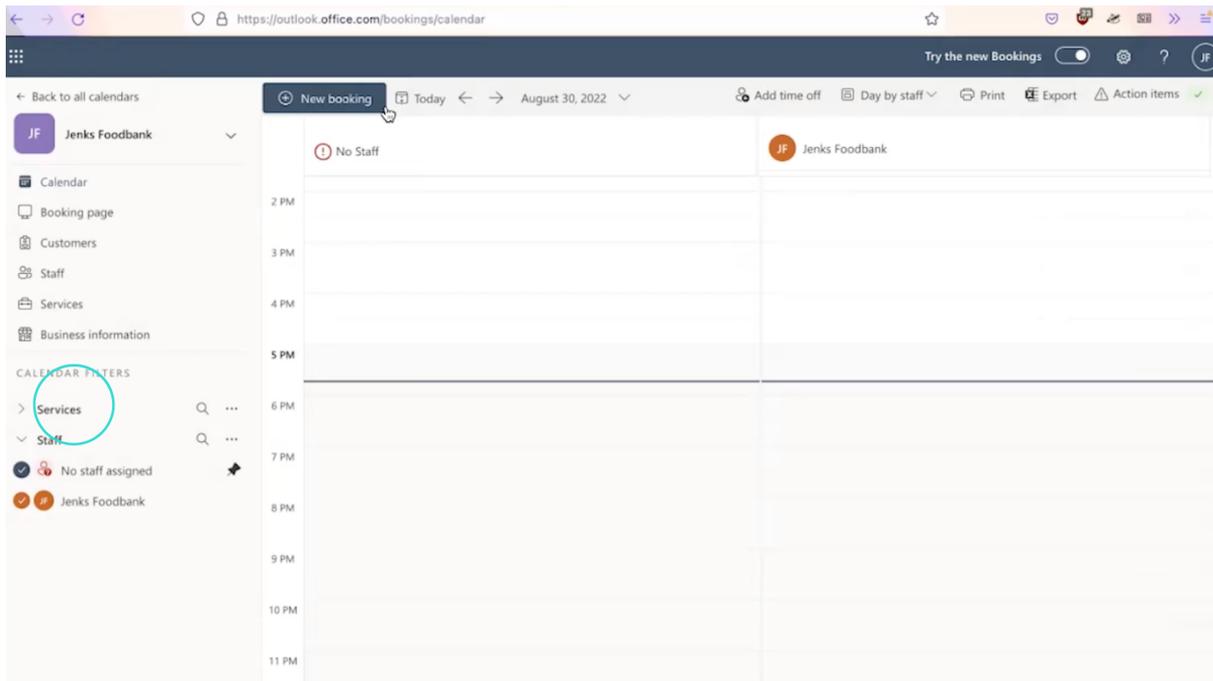


The Bookings wizard will provide you with some additional information on how to set up the calendar.

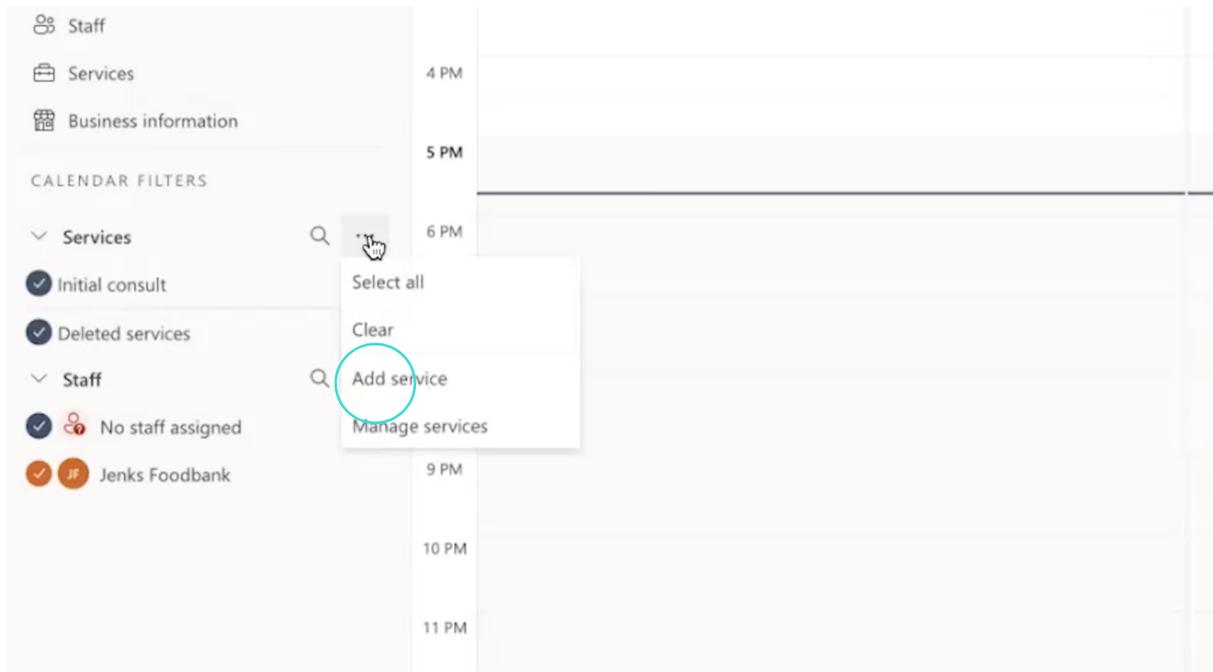
**To read all of the Bookings wizard information**, click the > forward arrow icon to keep reading.



**To create a new bookings service**, click **Services**.



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



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

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

The screenshot shows the 'Add service' form in a web application. The left sidebar contains navigation options like 'Basic details', 'Availability options', 'Assign staff', 'Custom fields', and 'Notifications'. The main form area has several sections: 'Service name' (highlighted with a red circle), 'Description', 'Location', 'Add online meeting' (toggle), 'Duration' (0 days, 0 h, 30 min), 'Buffer time' (toggle), 'Price not set' (dropdown), 'Notes', and 'Maximum number of attendees' (1 attendees). At the bottom right, there are 'Discard' and 'Save changes' buttons.

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

This screenshot is identical to the previous one, but the 'Description' field is now highlighted with a red circle, indicating the next step in the process.

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).

The screenshot shows the 'Add service' form with the following fields and settings:

- Service name:** [Text input field]
- Description:** [Text input field]
- Location:** [Text input field, circled in red]
- Add online meeting:**
- Duration:** 0 days, 0 h, 30 min
- Buffer time:**
- Price:** Price not set
- Notes:** [Text input field]
- Maximum number of attendees:** 1 attendees

Buttons at the bottom: Discard, Save changes

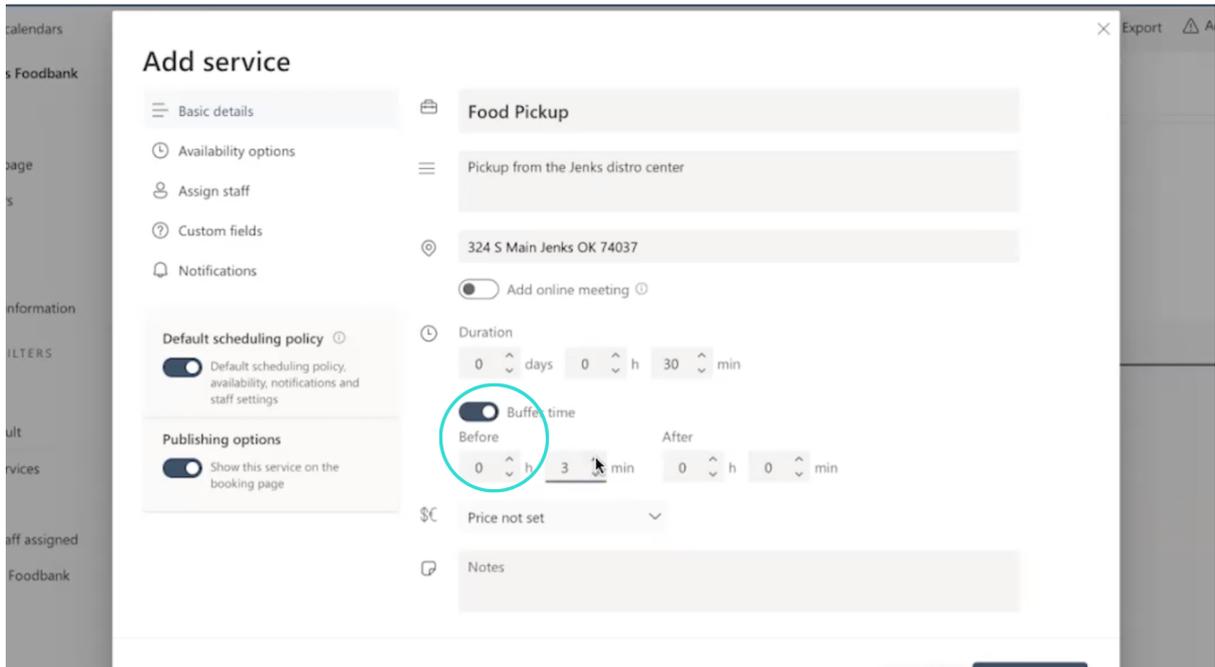
To set the duration of the pickup, based on how long you think your clients will need for an appointment, select the duration in days, hours and minutes under **Duration**.

The screenshot shows the 'Add service' form with the following fields and settings:

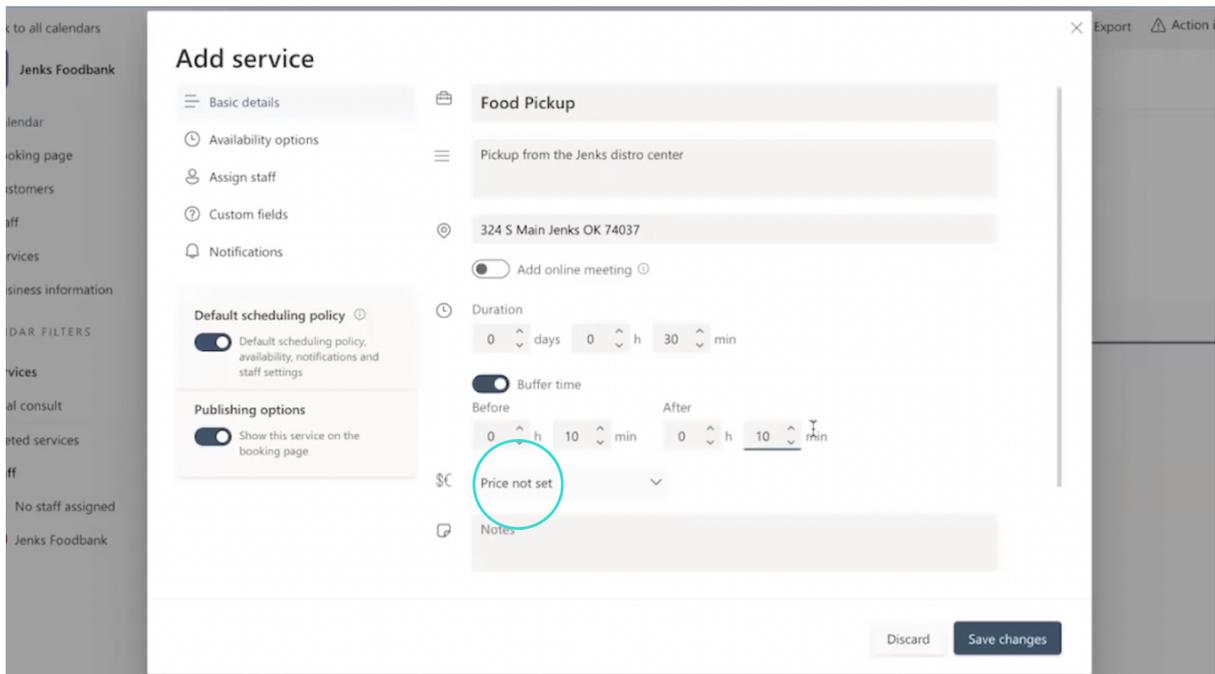
- Service name:** [Text input field]
- Description:** [Text input field]
- Location:** [Text input field]
- Add online meeting:**
- Duration:** 0 days, 0 h, 30 min (circled in red)
- Buffer time:**
- Price:** Price not set
- Notes:** [Text input field]
- Maximum number of attendees:** 1 attendees

Buttons at the bottom: 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.



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



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

to all calendars

Jenks Foodbank

### Add service

- Basic details
- Availability options
- Assign staff
- Custom fields
- Notifications

**Default scheduling policy**

Default scheduling policy, availability, notifications and staff settings

**Publishing options**

Show this service on the booking page

Service name

Description

Location

Add online meeting

Duration: 0 days, 0 h, 30 min

Buffer time

Price not set

Notes

Maximum number of attendees: 1 attendees

Discard Save changes

Click **Save changes** to proceed.

to all calendars

Jenks Foodbank

### Add service

- Basic details
- Availability options
- Assign staff
- Custom fields
- Notifications

**Default scheduling policy**

Default scheduling policy, availability, notifications and staff settings

**Publishing options**

Show this service on the booking page

Food Pickup

Pickup from the Jenks distro center

324 S Main Jenks OK 74037

Add online meeting

Duration: 0 days, 0 h, 30 min

Buffer time

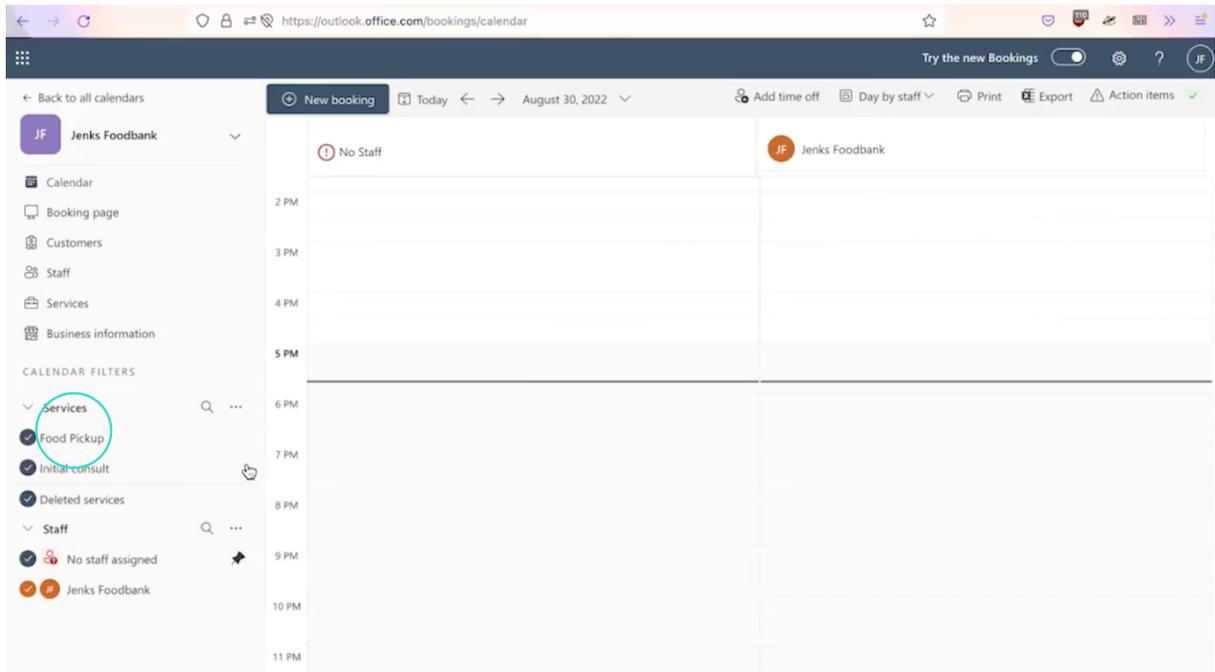
Before: 0 h, 10 min After: 0 h, 10 min

Free

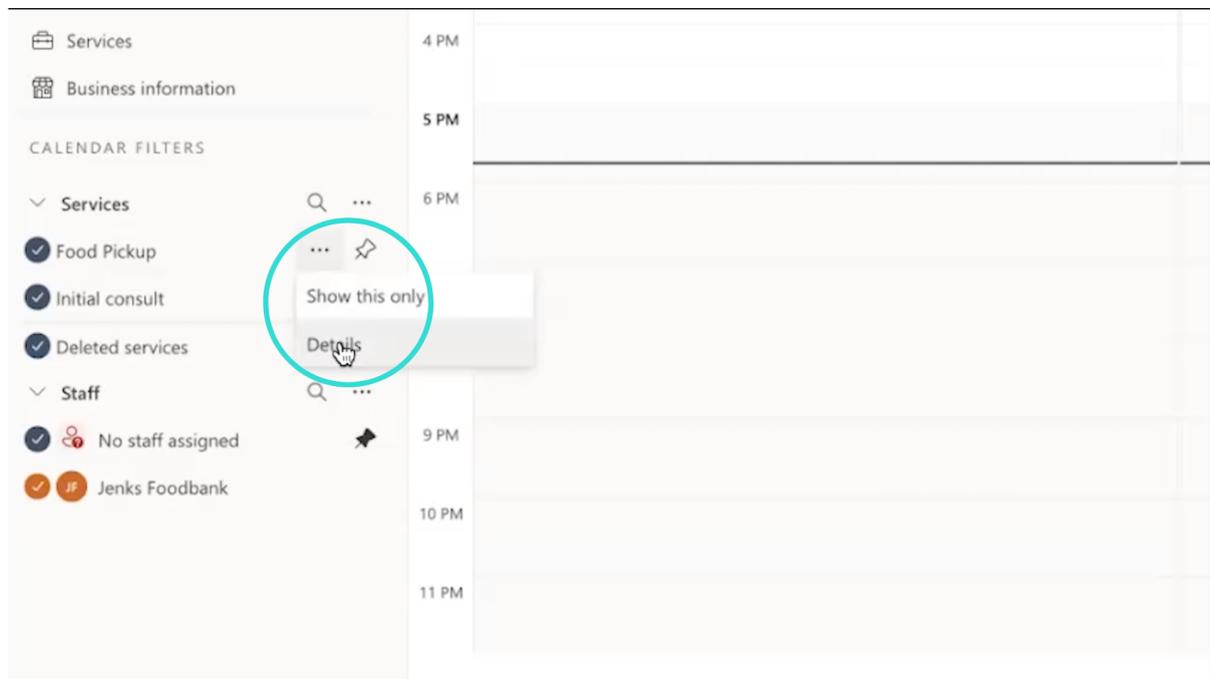
Notes

Discard Save changes

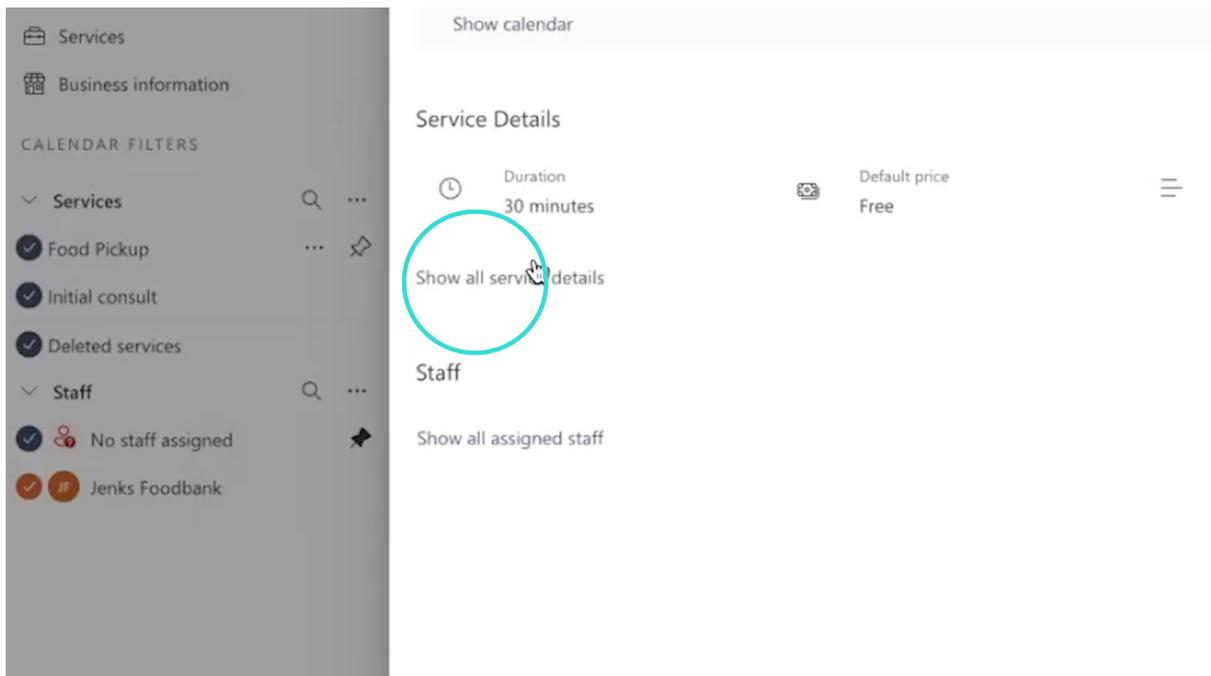
Your new service (which, for example, may be called Food Pickup) will now appear under the **Services** tab.



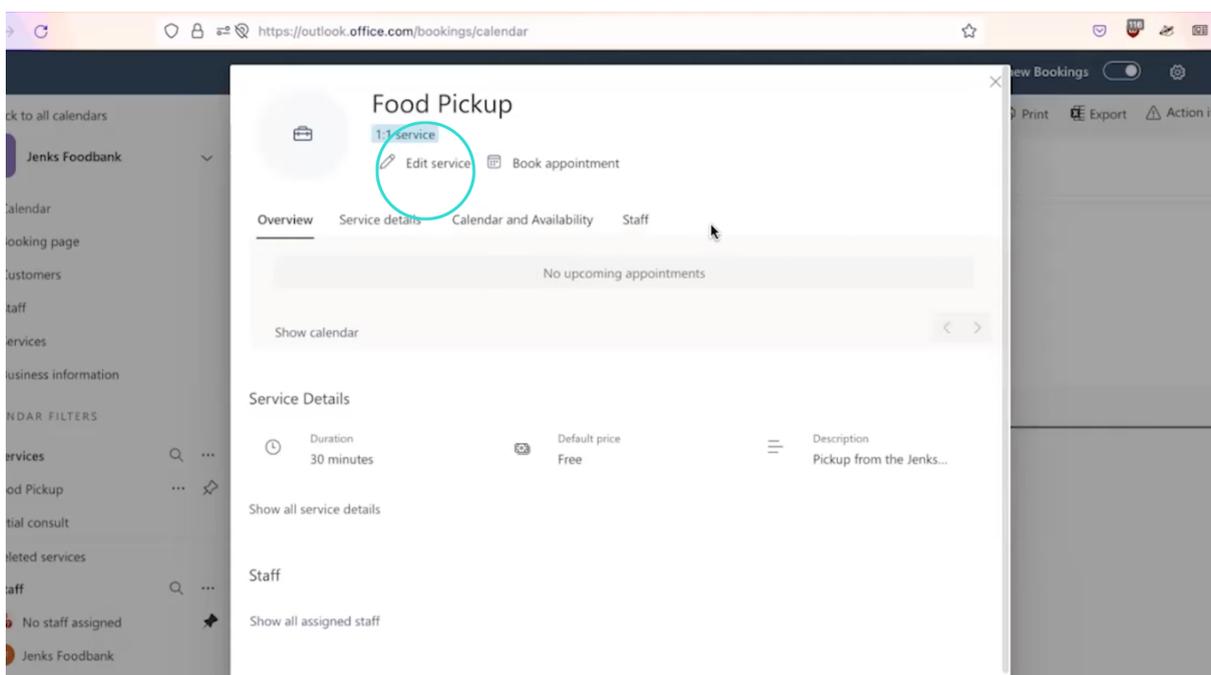
To review and edit any details regarding your newly created service, click the **...** icon next to your new service (which, for example, may be called Food Pickup). Then click **Details**.



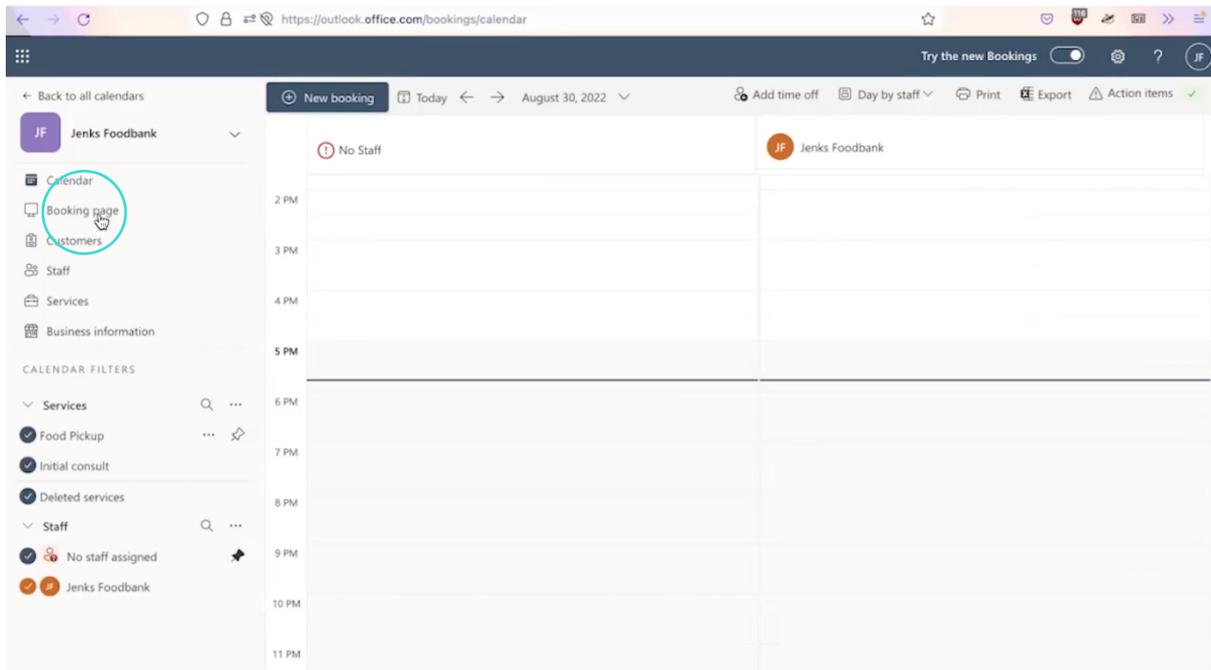
A new popup screen will appear called **Service Details**. Click on **Show all service details** to review and edit the service.



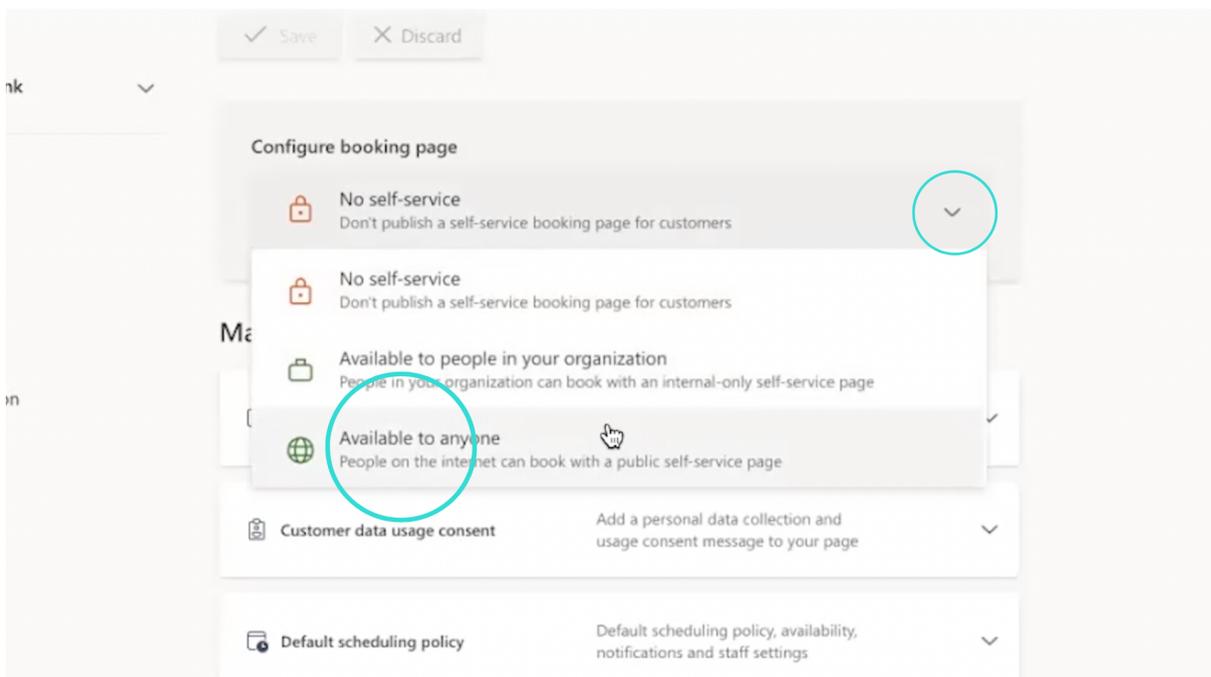
Click on **Overview**, **Service details**, **Calendar and Availability**, and **Staff** tabs to review and information related to those aspects of the service. Click on **Edit service** to make any edits.



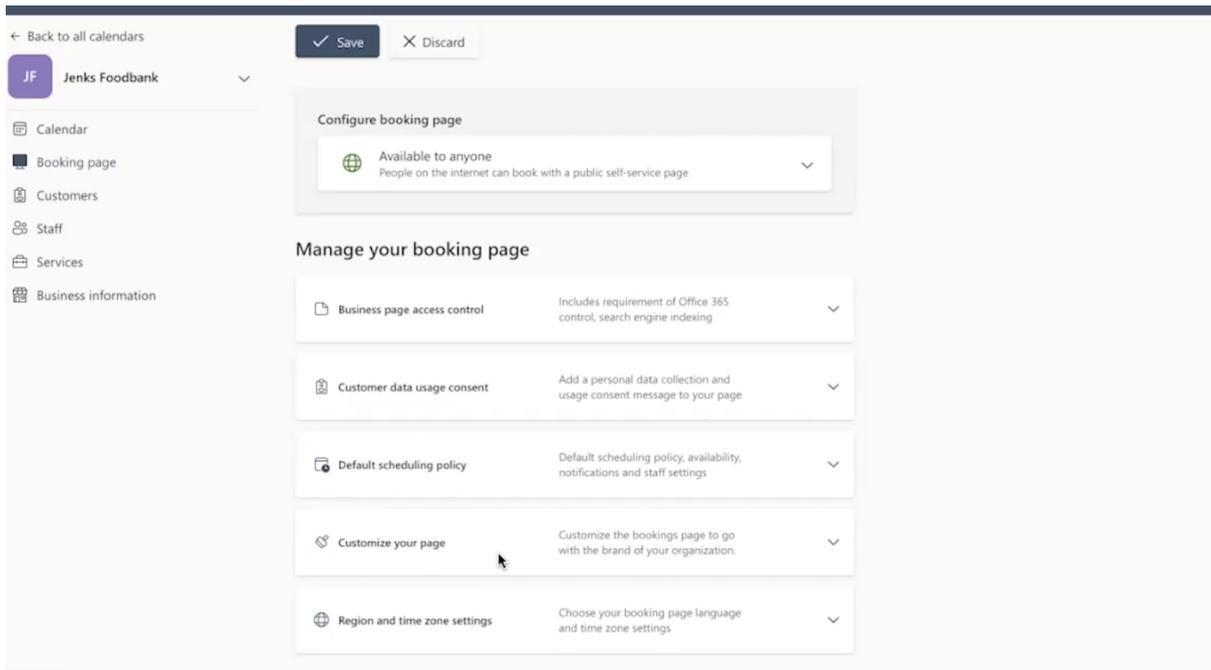
To make a booking service publicly available to anyone, click **Booking page**.



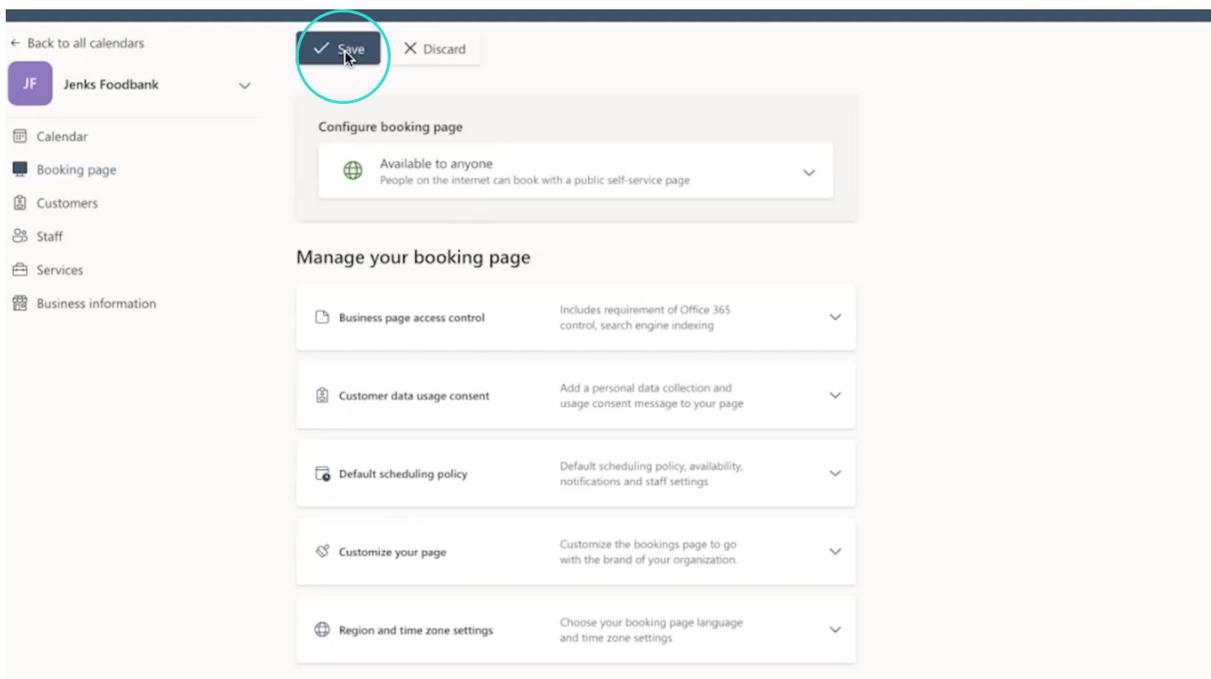
Next, under **Configure booking page**, click **No self-service** and select then click **Available to anyone** from the dropdown menu. This will enable anyone to view and make online bookings through your calendar, once you've shared the booking page link.



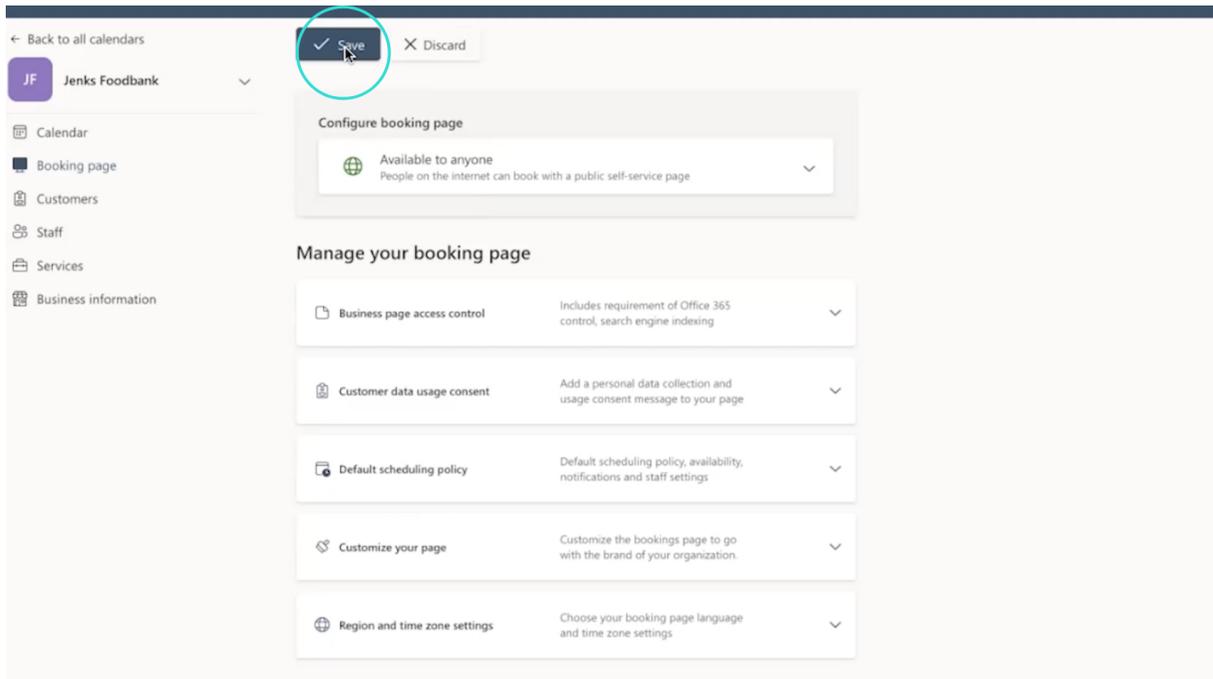
**Tips:** There are various optional customizations you can activate at this stage under **Manage your booking page**. This includes changing your **Business page access control**, **Customer data usage consent**, **Default scheduling policy**, **Region and time zone settings** and **Customize your page**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



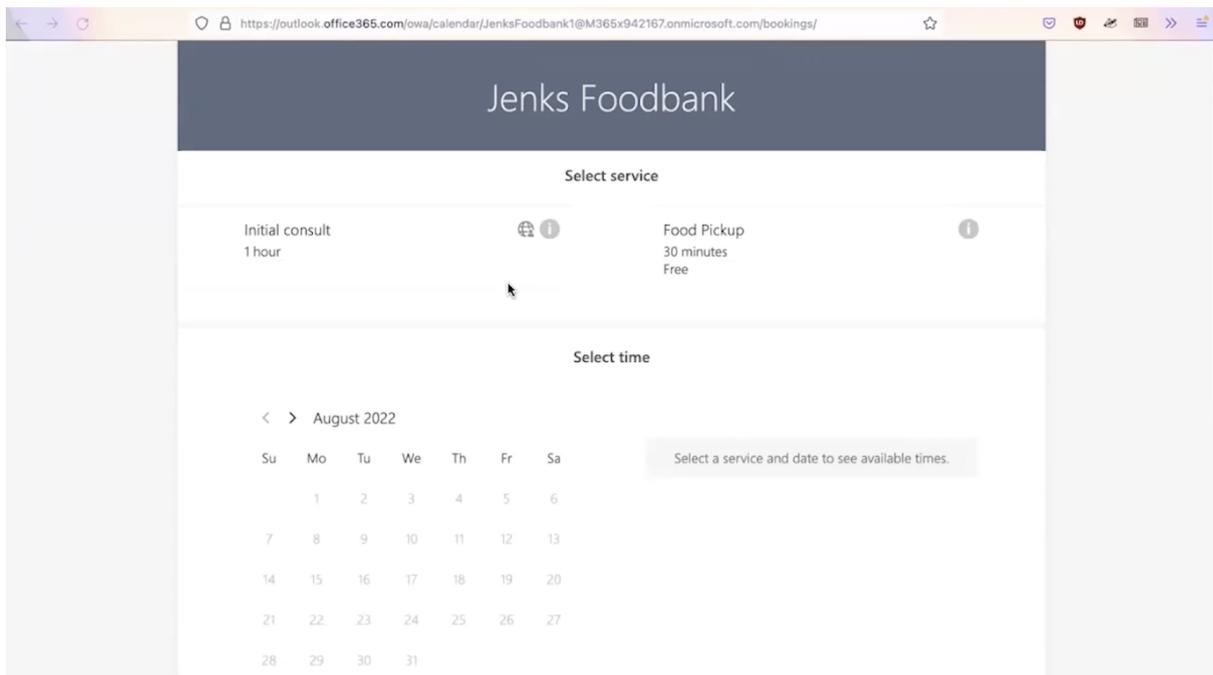
Next, click **Save**.



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.



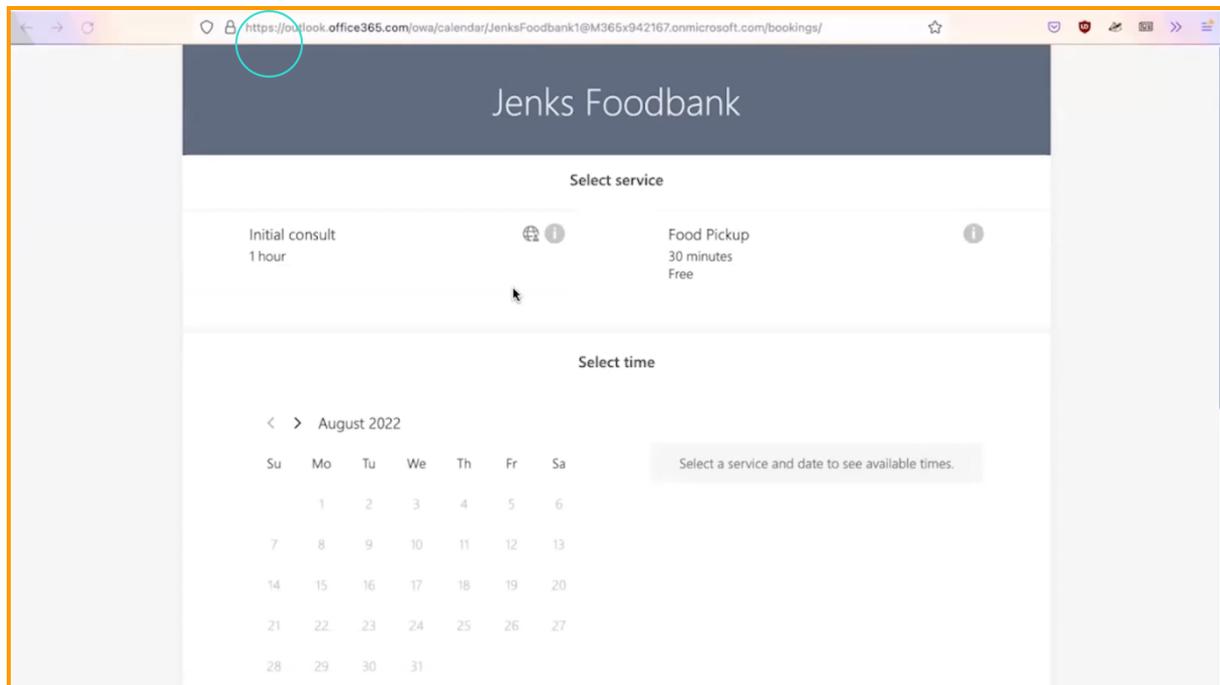
It may look something like this example for Jenks Food Bank. This is the public booking page that your clients will see and use to schedule their food pickups.



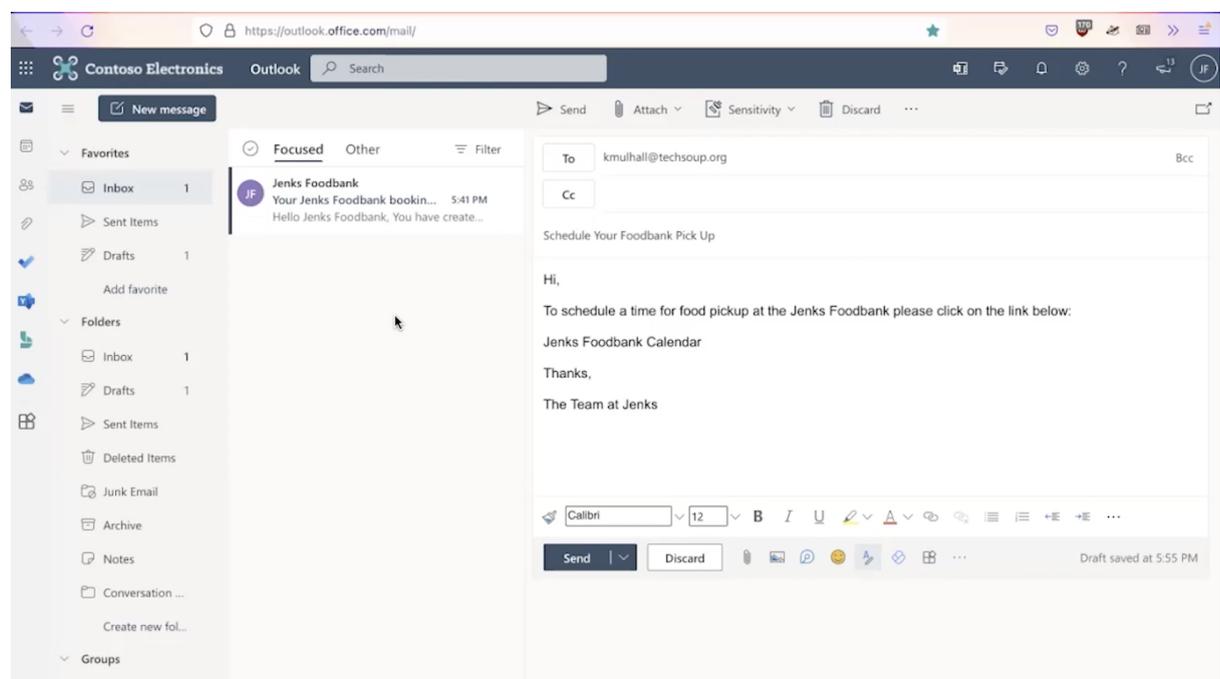
## Send an invitation for scheduling a pickup

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.

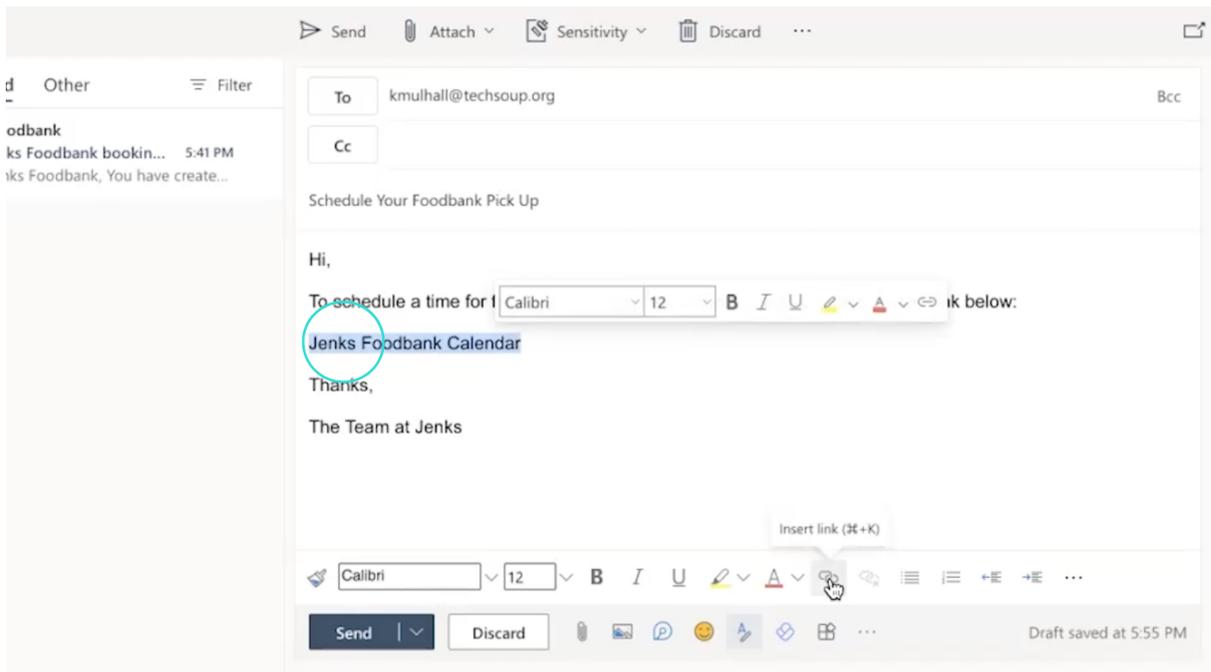
To copy the link to the scheduling web page, click and highlight the URL (which starts with <https://outlook.office365.com>), then copy the URL (to copy press Ctrl + C (on Windows) or Command + C (on Mac)).



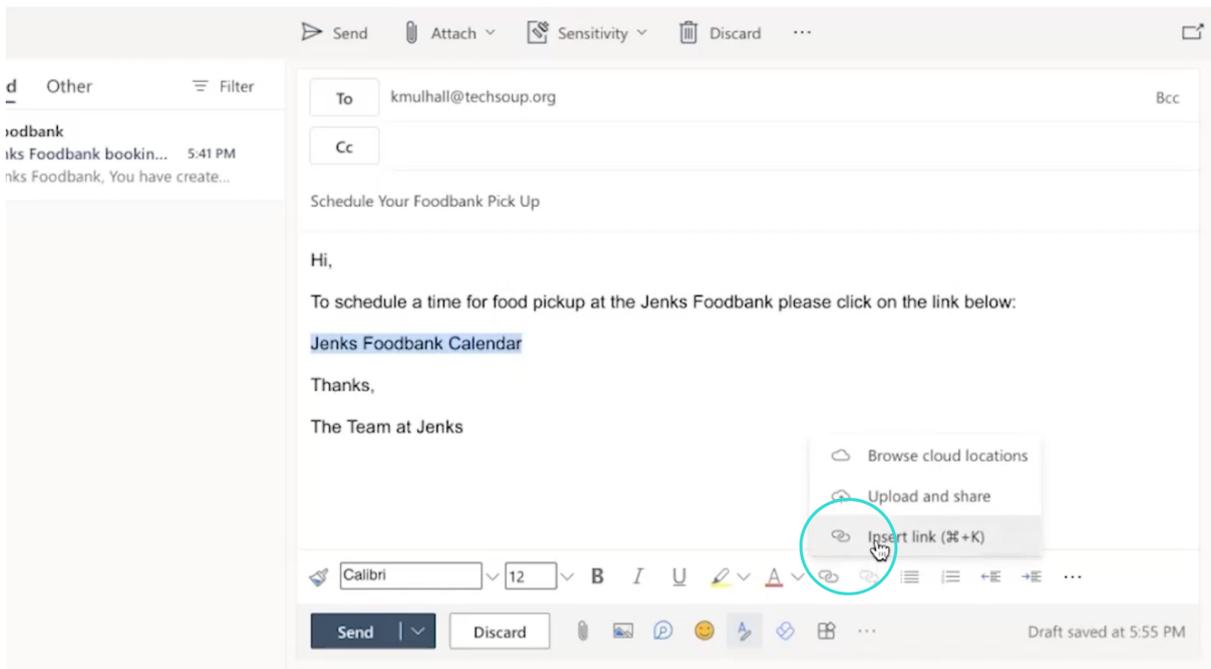
Next, open Outlook to draft an email to your clients in which you'll paste this bookings URL link. Draft the email to send to your clients. Your email may look something like this.



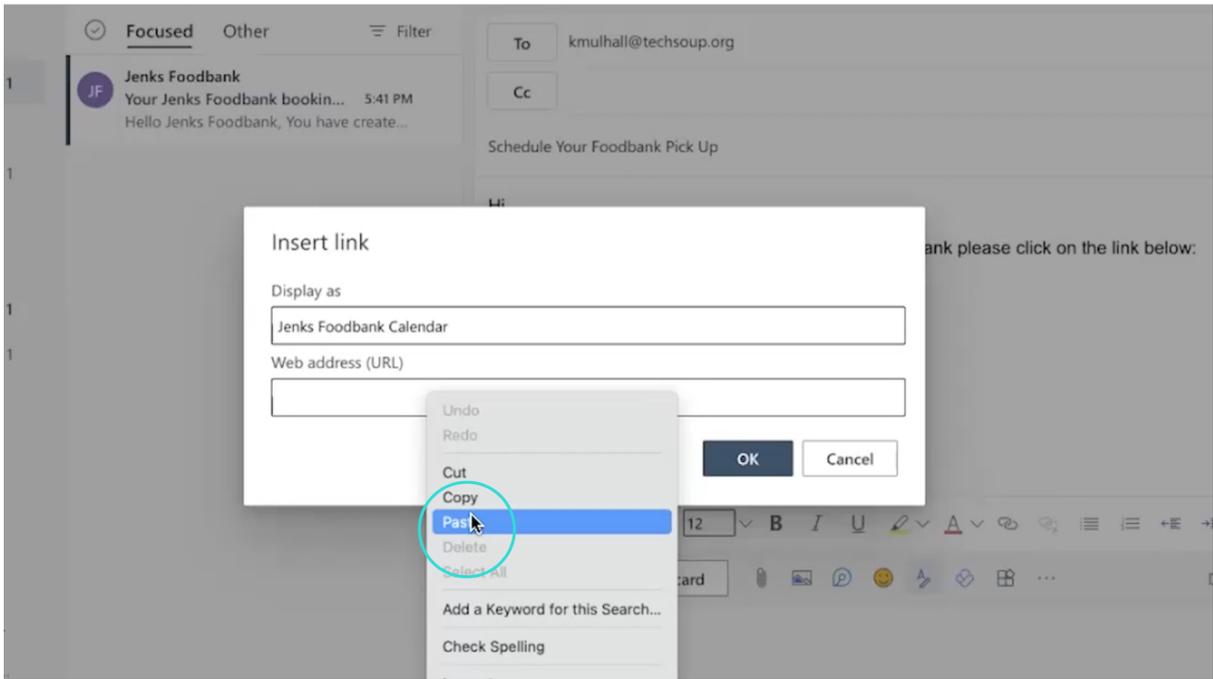
To add a hyperlink to your foodbank or food pantry booking calendar, select the text (in this example we've selected Jenks Foodbank Calendar) by highlighting it.



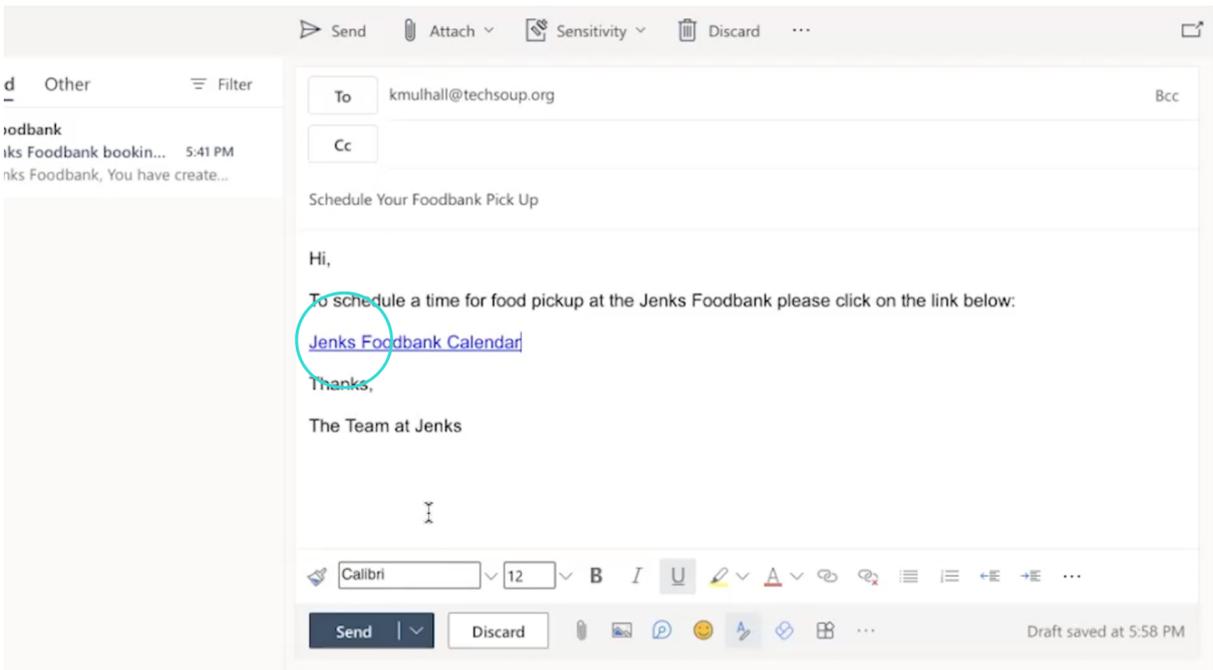
To insert the hyperlink, click on the  **Insert link** icon and click **Insert link** from the dropdown menu.



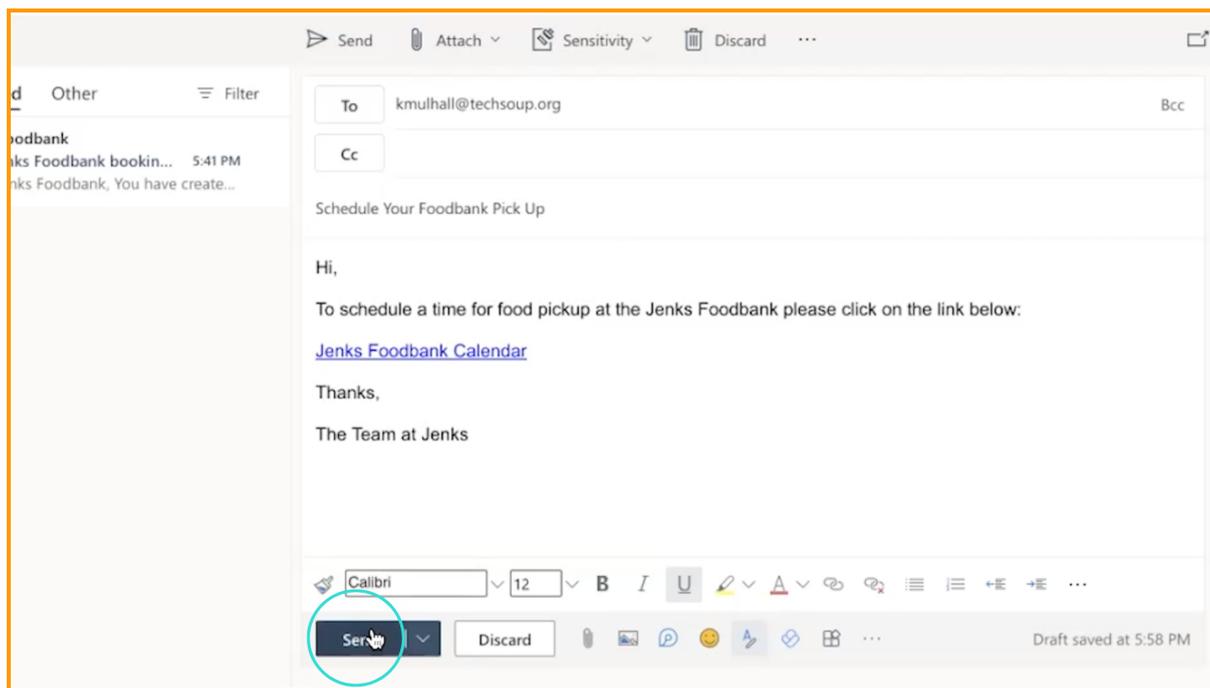
An **Insert link** popup screen will appear. To **paste the hyperlink** click on the **Web address (URL)** box and right click on your mouse or keypad to bring up the dropdown menu. Click **Paste** to insert the link.



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



To send your email, click **Send**.



**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](#).