Airtable Setup Guide

Introduction to Airtable

Airtable allows farmers to create an online order form and view the collected orders in an easy-to-understand grid. Airtable can’t process online payments, so customers must make non-cash payments through a third party platform. Farmers must manually track customer payments.

Key Links for Airtable

- Airtable Website
- Example Airtable “Store”
- Mobile App (Apple)
- Mobile App (Android)

Pricing	Free
Setup time	15-25 min
Pros	• Free tool with quick, easy setup • View orders in user-friendly grid view
Cons	• Cannot process online payments • Difficult to handle logistically intense operations • Farmer must manually track payments • No branding/customization for free plan
Features	• Clean, simple order form for customers • View orders in easy-to-understand, mobile-friendly grid view

Payments	• Allow payment through cash and/or third party online payment platform
	• Popular third party payment platforms include Venmo, PayPal, and Cash App
	  ◦ How to set up Venmo
	  ◦ How to set up PayPal

	◦ How to set up Cash App • It's free to send or receive money through these platforms

Use Airtable if:

- You want to give online sales a try without committing too much time/money
- Your operation is not as logistically intense
- You have the bandwidth to manually track customer payments

Step 1: Create account

- Go to Airtable's signup page
- Create an account and log in

Step 2: Create base

- **Create a workspace and base**
    - First create a workspace for your farm by clicking `Add a workspace`
    - In your farm workspace, click `Add a base` → `Start from scratch`
    - Name your base. Enter the base by clicking on its icon
- **Reformat the default base and enter form view**
    - Delete the 3 default columns ("Notes", "Attachments", "Status"): click the dropdown arrow on the right side of the column header and select `Delete field`
    - Delete the 3 default rows: select the rows by clicking and dragging over them. Right click and select `Delete all selected records`
    - Go to the views sidebar on the left side. Under `Create a view`, click `Form`
    - Click on `Form view` to enter the form

Step 3: Add title & description

- **Add a title to the form**
- **Add key information in the form description**
    - Description of farm/products
    - Pickup information
    - Season timeline
    - Order policies
        - Order deadline
        - Payment policies

    - Refunds
- Contact info

Step 4: Add fields

- **How to add fields**
    - Go to the fields panel on the left side and click `Add a field to this table`
    - Set the field name and select a field type from the dropdown menu, click `Save`
- **How to edit fields**
    - Click on a field to edit it
    - Add help text
    - Click the dropdown arrow next to the name of the field and select `Customize field type` to change/edit the field type
        - For multiple select fields, edit the choices via `Customize field type`
    - To make a question mandatory, click the `Required` toggle on the top right corner
    - Reorder fields by dragging them around
- **Suggested fields to add**
    - Name (single line text, mandatory)
    - Email (email, mandatory)
    - Phone (phone number, mandatory)
    - Items (multiple select, mandatory)
        - add product description and prices in the help text
    - Form of payment (single select, mandatory)
        - add payment policy info and Venmo/Paypal/Cashapp handle in the help text
    - Pickup day (single select, mandatory)
        - Add order deadline info in the help text

Step 5: Finalize & Share

- **Finalize and review your form**
    - Set a custom post-submission message at the bottom of the page
    - Click `Open form` to preview your form
- **Share your form online**
    - Click `Share form` to get the shareable link to your form
    - Share this link on your website, social media, and email newsletters

Step 6: Track orders

- **Access orders by entering grid view**
  - Go to the views panel and select `Grid view`
  - Change the row height by clicking on the row height icon (to the right of the `Share View` button)
- **Sort records by pickup date**
  - Click `Group` → `Pick a field to group by`
  - Select your pickup day field from the dropdown menu
  - The grouped grid allows you to easily understand what orders you need to fulfill on each pickup date
  - To ungroup, click the `x` next to the grouping information
- **Add extra columns to the spreadsheet to track payments and order completion**
  - Click the `+` to add a new column
  - Select the checkbox field type
  - Add field title ("Paid" and "Completed")
  - Check off the "Paid" and "Completed" columns to track online payments and fulfilled orders
  - Adding columns to the grid view will not affect the form your customers see
- **View an individual record**
  - Hover over the first column of the record you wish to view
  - Click on the blue diagonal arrows icon to expand the record
- **View on mobile**
  - Download the mobile app (Apple link, Android link) and log in
  - Click on your base to see the grid view
  - Click on a row to expand that individual record
- **Download or print the grid view**
  - Click on the `...` icon next to `Grid View` on the top left
  - Select `Download CSV` or `Print view` from the dropdown menu