Airtable

15 Best Practices for Airtable Base Design

What Companies Need to Know



15 Best Practices for Airtable Base Design for Companies

What You Need to Know



Published By



On2Air - Apps to Run Your Business in Airtable

About

Wondering where to start when designing your Airtable base?

We've created this 15-point checklist of Airtable best practices to know when you're ready to use Airtable as your company's database.

Airtable is a powerful tool to use as a central source of information for your business and your team, but it can be overwhelming to get started. By understanding the basic base design principles, you can use Airtable more effectively and create better workflows.

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What is Airtable?

Airtable is used by 200,0000 companies as an all-in-one central source for managing information. You can store your business and customer data, documents, images, and much more. It's a modern database tool made for businesses who want an easy way to view everything that makes a business run.

With Airtable, you can keep track of vital data and <u>automate</u> multiple parts of your business workflow to eliminate constant data entry or trying to remember everything.

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Airtable's design layout is similar to a spreadsheet. But the real power of Airtable is in being able to connect all your different types of company data to one another, i.e., connect Customers to Sales, connect Customers to Interactions, all while having an organized and easy-to-find <u>dashboard</u>.

Related:

- How to Send an Email Automatically from Your Base Using Airtable Automations
- How to Create Automatic Links to Records in the Same Table in Airtable

15 Airtable Base Design Best Practices

Here are the best practices we recommend to ensure a smooth experience with Airtable.

1. Write out a complete list of what you want to accomplish before starting

List out everything you want to do with Airtable, whether you think it's possible or not. This practice is to brainstorm and get a big-picture understanding of what you need or want.

Example:

We want to have a business system where we can:

- Store all of our customer information, such as name, address, phone
- Track services sold to customers
- Create and track work orders
- Allow staff to be able to create work orders
- Create quotes and invoices automatically to email to customers
- Forms that customers can fill out on your site
- The ability to process payments

Related:

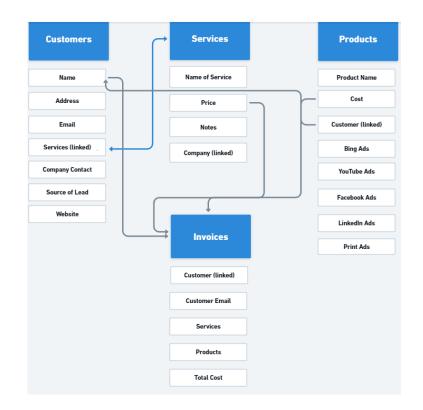
• Created Automated Invoices in Airtable

2. Create a base outline before starting

Draw it out on a piece of paper or use a diagram tool like Miro or Whimsical to visualize how everything needs to be connected.

Create a list of each **Data Type** you'll need, such as Customer, Sales, Interactions, Employees, Proposals, etc. Data Types are the groups or categories that contain the same type of information. Each Data Type needs to have its own <u>table</u> in your base.

Then, list out the specific information you want to track and store for each data type. In the Employees table, you might want the Employee Name, Address, Hire Date, Role, etc. In the Interactions table, you can save the Date, Type, Company Contact, and Notes of the Interaction.



3. Use the same table for the same data types

If you need to store information about your Customers and you want to track whether they are an **Active Customer** or **Inactive Customer**, you still need to store the information in the same table in your base.

Why keep them in the same table?

Whether they are Active or Inactive, a Customer is still considered the same type of data. If you store Customer information in 2 different tables, it leads to duplicate data types and can quickly make your information difficult to understand and messy.

Instead, you can add a <u>Single-Select</u> field type in the table to tag a Customer's record as Active or Inactive. You then create Views in that table and filter to display only the Customers who have a Status of **Active Customer**.

4. Learn about Field Types to know which Field to create

Field types are the types of data structures inside your table. They are used to properly format each Data Type, and using the correct field type ensures you can use your data cohesively.

Some field types available

- Attachments used to upload files
- Date used to store date and time
- Checkbox used to check or uncheck
- Collaborator users
- Email add emails
- Linked record link records to each other in separate or the same tables

- Number add numbers
- Currency used for currencies
- Formula used for calculating values across fields see available formulas

See the complete list of Field Types available

For each Data Type, you'll need to choose the appropriate Field Types to store your information. In the **Employees** table, you might use the following field types for each field:

- Name Formula combining First Name and Last Name fields (<u>CONCATENATE</u> or & formula)
- First Name Single line text
- Last Name Single line text
- Image Attachment
- Status Single select
- Address Single line text
- Hire Date Date
- Role Single line text
- Department Linked record
- PTO Linked record
- Total PTO Rollup field of PTO linked record to Hours field with SUM(values)
 Formula

5. Use Views with Filters to display a snapshot of what you need to see

Views will quickly become your constant sidekick when viewing your information in Airtable. A view is a refined snapshot of your data in a table that allows you to filter and sort your information.

You can customize what you see in your view by adding filters to specific fields. Instead of having to scroll through 46 fields in your table, you can display only the 12 fields you need to see.

If you have a table where you store all your Social Media posts, you may only want to see which posts are **Posted**. You can create a view labeled **Posted** and filter it to show only records with a Status of **Posted**.

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6. Use Linked Record field types to connect data and create easy-to-find relationships

<u>Linked records</u> are one of the most powerful features of Airtable. You can connect any type of data to another. It gives you a full overview of how everything is your company is connected.

Example: You have a Customers table and a Services table. You can create a linked relationship from Customers to Services to see which Customer used a specific Service. You can then view the data from either table and immediately see all the details you need.

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Related:

How Defiant CNC Uses On2Air Amplify to View Multiple Airtable Tables in 1
 Dashboard

7. Use Rollup and Lookup fields to view data from other tables without having to create duplicate data

You can view related information from any table using a <u>Lookup field type</u> or <u>Rollup</u> <u>Field Type</u> from a <u>Linked Record field type</u>.

If you have an Employees table and a PTO table connected by a Linked record field type, you can use Rollup fields to display the amount of PTO Hours on the Employees table. These fields help you view more information from various tables without duplicating information.

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4	Ernie Daniel		Finance	Haroon Yu	Active	3/12/2021	8	96	88	
5	Jiya Price		Marketing	Haroon Yu	Active	2/23/2021	8	150	142	
6	Suzanne Sloan		Operations	Louisa Mccarthy	Active	3/9/2021	8	124	116	
7	Darryl Meza	9	Operations	Haroon Yu	Active		0	96	96	
8	Cristiano Rose	6	Finance	Louisa Mccarthy	Active		0	40	40	
9	Serena Enriquez		Finance	Louisa Mccarthy	Active		0	85	85	
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Related:

How to Automatically Add a Set of Tasks to Each New Project Using Airtable
 Automations

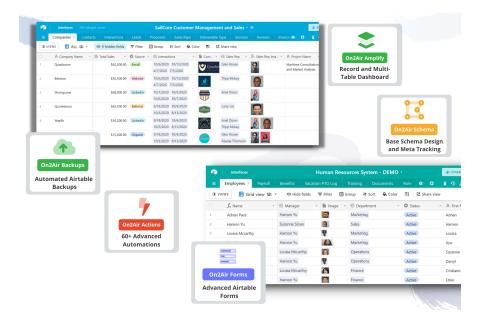
8. Understand your Integration needs and what other tools you might need to use

While Airtable has many strengths and can be used as a central repository of information, businesses rarely use just one tool for everything.

- Do you need to connect to another software system?
- Does Airtable have built-in support for your needs, or do you need to use a 3rd party tool?

When combined with other software tools, Airtable can be 10x more valuable. Many automation apps, like On2Air, Zapier, Make, and other business tools you already use, like Gmail and Quickbooks, can be connected to Airtable.

<u>On2Air</u> offers premium Airtable apps for businesses that use Airtable for their operations. Apps for automated backups, automated documents, advanced forms, dashboards, and base design schema.



Add an On2Air App to your Airtable base

9. Use the Permissions settings to give appropriate access to employees and contractors

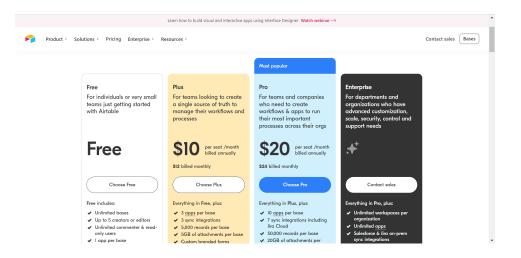
You'll probably need more than just one person accessing the information in your Airtable base. Airtable has multiple collaborator options depending on the type of permissions you need to give each person.

You can choose between Owner/Creator, Editor, Commenter, or Read-Only. Each type of collaborator has varying access levels to the data in your Airtable base. Some can access and edit the entire base, data, and structure, while others can only comment on or view the records.

It helps to understand each level, so you know what to assign someone on your team. <u>Learn about Permissions</u>

10. Understand Airtable pricing

In addition to understanding permissions, you need to understand the pricing plans. Airtable is priced on a collaborator basis – a per person cost per workspace. There are 4 plan levels – Free, Plus, Pro, and Enterprise.



With the Free plan, you can invite up to 5 collaborators, unlimited bases, 1,200 records/base, 1 app, and 2GB of attachment space. This plan is helpful for someone who needs basic data tracking and is just getting started.

The Plus and Pro plans include specific record limits, app limits, and other features specific to each plan. This plan is most common for small and medium businesses. Enterprise plans are for larger companies that need more advanced features, more collaborators, and more record space.

In all plans, you need to understand **how you're charged for collaborators**. The collaborator limits tend to catch new users by surprise.

When you add a new collaborator to your workspace or a specific base, you're charged for that user unless they have Read-Only permissions. You'll need to pay for a collaborator user for anyone who needs to edit records.

Learn more and understand the Airtable pricing plans

11. Know your budget range for building your system in Airtable but be flexible

Creating a new system or moving from one business system to another is a process. It takes time, learning, and money to build and configure business workflows that work correctly and do what you need.

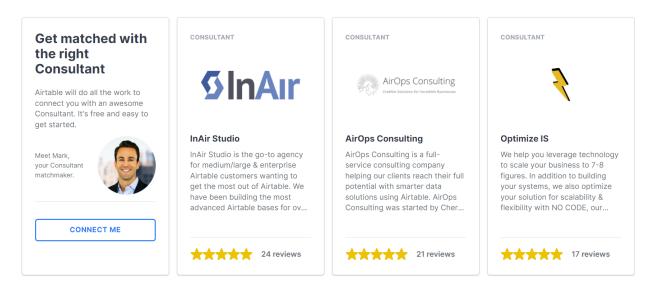
While you may have a budget in mind, it's helpful to have an open mind and understand that you won't know exactly what you need until you start building. You may be able to use Airtable for most of your system, but you might also need to integrate it with <u>other</u> <u>software tools</u>.

12. Hire an Airtable expert if you're unsure of the right direction

You don't know what you don't know when you start building an Airtable base. Hiring an Airtable Expert Consultant may be the best next step for your Airtable project. They can set up a framework to help organize your business and help you as you grow.

Expert consultants already understand the ins and outs and nuances of Airtable. They know how to properly design Airtable bases, what to do and not to do, and can ask you questions about your business you may not have considered.

They also have expertise in connecting multiple systems together and know when Airtable or another software tool would be a better fit.

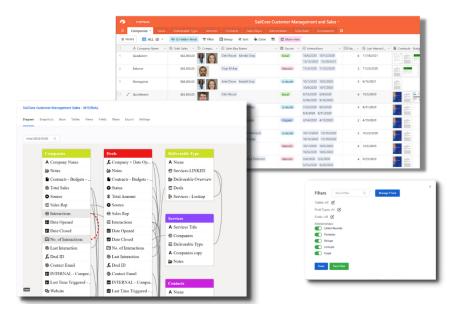


Find an Airtable expert in the Airtable consultants' directory

13. If you've inherited an Airtable base built by someone else, generate a design of the layout and relationships

Airtable bases can be complex structures with multiple tables, views, relationships, and fields. If you're about to start using an already existing base, it helps to visualize the design and structure.

Use a schema tool like <u>On2Air Schema</u> to automatically generate layouts of your base design to showcase the base outline, tables, views, fields, and relationships.



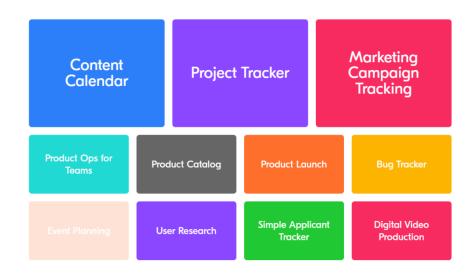
Related:

- Visualize and Monitor Your Airtable Base Structure with Schemas
- The Essential Guide to Airtable Backups

This will help you understand the base structure and the connections between tables and fields. With the schema app, you can track changes to any table, view, or field names and track when new tables or fields are added or deleted.

14. Explore the Airtable Universe and Template Directory for ideas of existing similar bases

The <u>Airtable Universe</u> is a directory of free Airtable base templates created and submitted by users. It includes base templates like <u>event management</u>, <u>content</u> <u>management</u>, and an <u>invoice generator</u>. The <u>Airtable Template Directory</u> has multiple starter bases.



On2Air also has several <u>Airtable base templates</u> and document templates available for businesses. You may be able to find bases similar to what you need to give you a head start on organizing your systems without starting from scratch.

Related:

- Customer Manager and Sales (CRM)- Airtable Template
- Sales Invoice Template

15. Join Airtable focused communities to share ideas and get help

Learn from those who have already been using Airtable and understand what you're trying to accomplish. The <u>BuiltOnAir Community</u> is a group of over 1,000 Airtable enthusiasts. The community is a place where you can ask for specific help on a problem you need to solve, meet other Airtable users, and connect with experts.

You can also check out the <u>Airtable Facebook community</u> and the <u>Airtable community</u> forum to connect with other users and ask for help.



Designing Better Airtable Bases

This 15-point checklist will help you use best practices when thinking about Airtable base designs. By understanding the basic base design principles, you can use Airtable to create more structure in your business to help you grow.

Make Your Airtable Bases More Powerful



On2Air

Apps to Run Your Business Operations on Airtable

www.on2air.com



On2Air Apps



Dashboard for your base to customize how you view your records, linked records, tables, and more. Create multiple blocks to display or hide specific fields and view multiple tables at once.



Automation tool with integrations and pre-made no-code functions to connect your Airtable data to other Airtable bases and to over 2,500 software tools used in your business.



An automated backup app for your Airtable bases. The On2Air Backups app creates scheduled backups of your critical business data stored in Airtable and exports your information to Dropbox, Box, or Google Drive.

Cn2Air Forms

Create advanced forms using your Airtable data. You can prefill your form fields with data from your base, display field data on the form, show a list of specific records, add read-only fields, and much more.



Generates a base diagram design to visualize your Airtable base, table, view, and field structure and relationships. You can track changes to your metadata, such as table, view, and field changes.

Sign up to try On2Air for your company