

Airtable

**AOAI Coaching Session
20/11/2025**

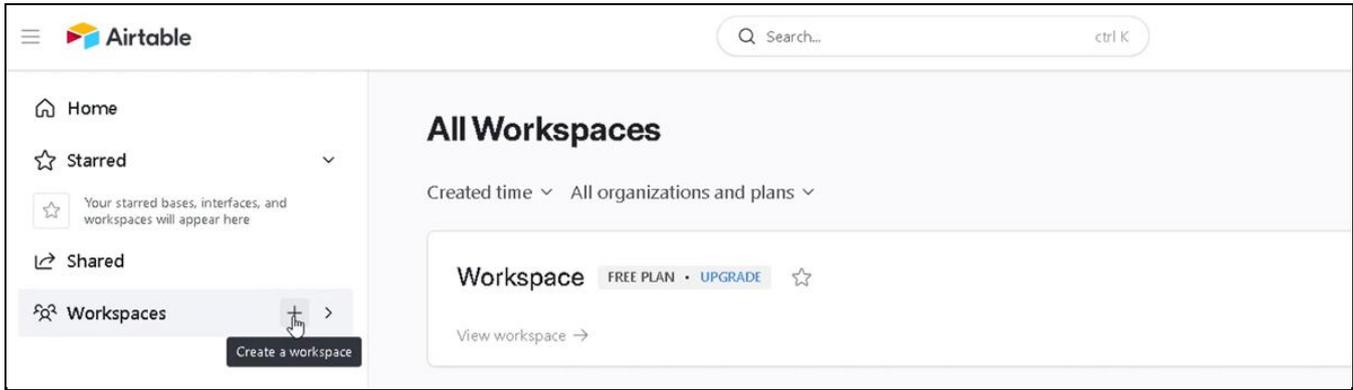
Step-by-step workbook



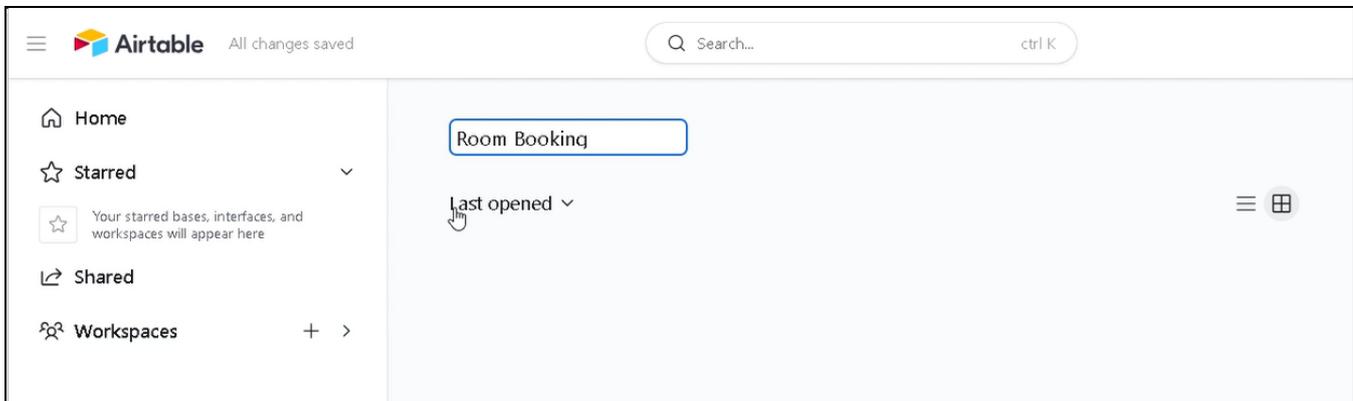
Section A: Create your Room Booking Base and Tables

This section creates the Workspace and tables.

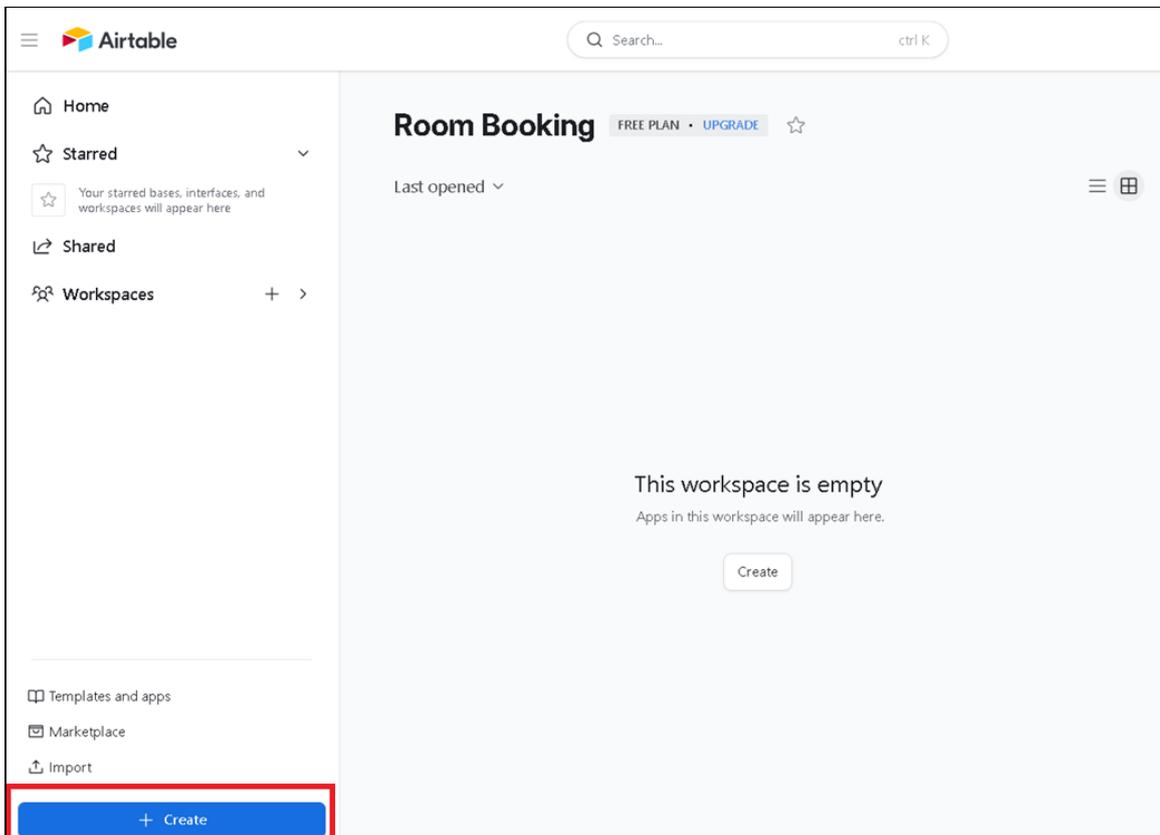
1. Click on the + icon next to the workspace menu item



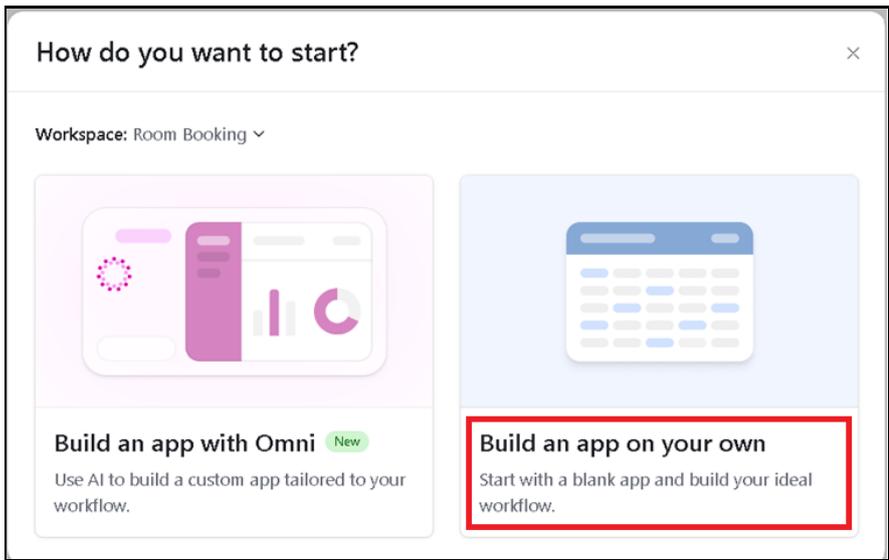
2. Change the workspace name to: Room Booking



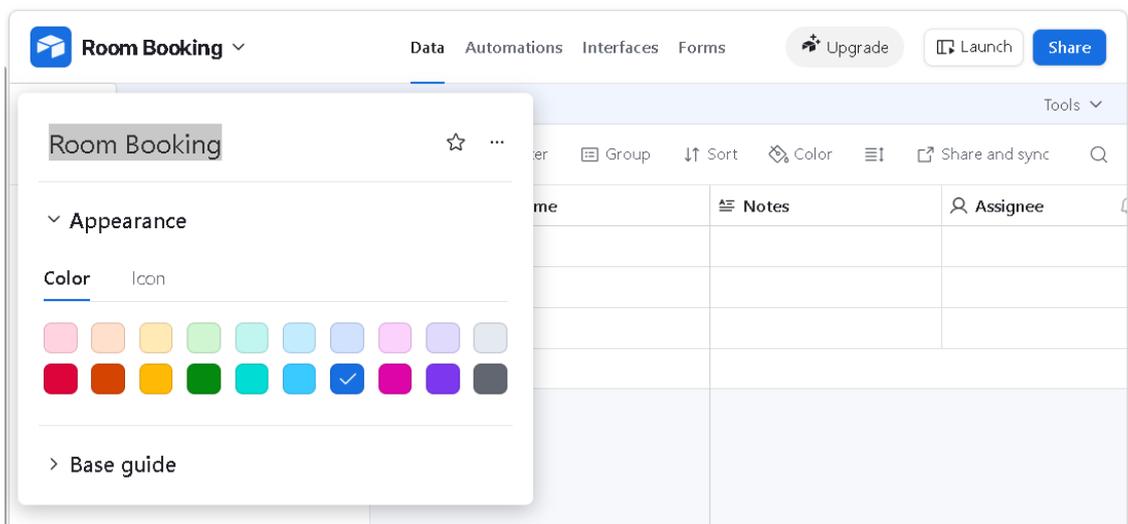
3. Click on the create button at the bottom left of the screen



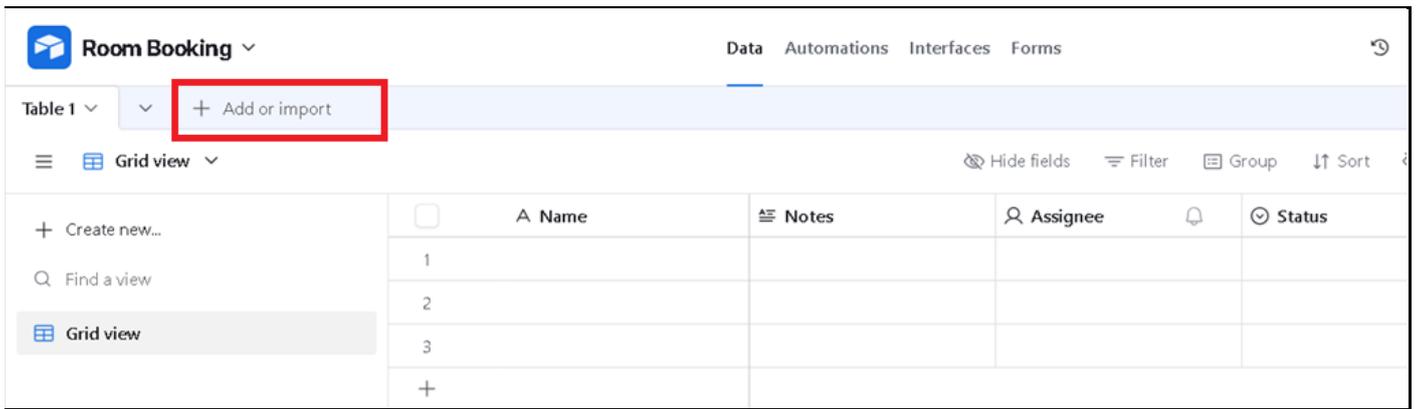
4. Select Build an app on your own



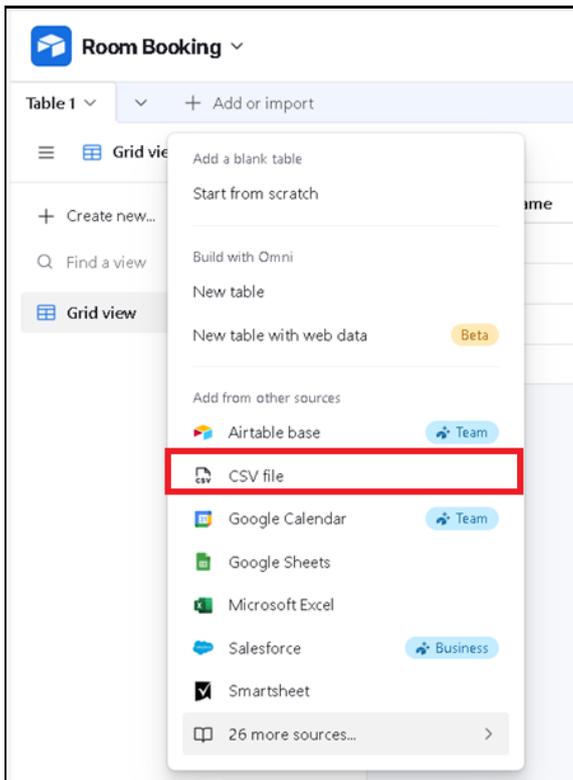
5. Click on the base name “Untitled Base”, change it to “Room booking”



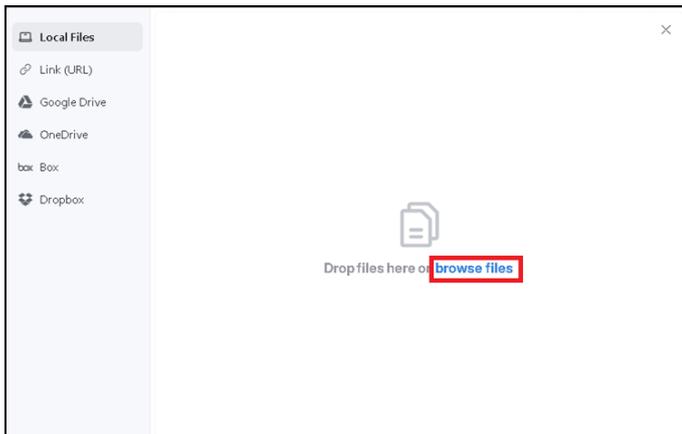
6. Click on + Add or Import



7. Select CSV File



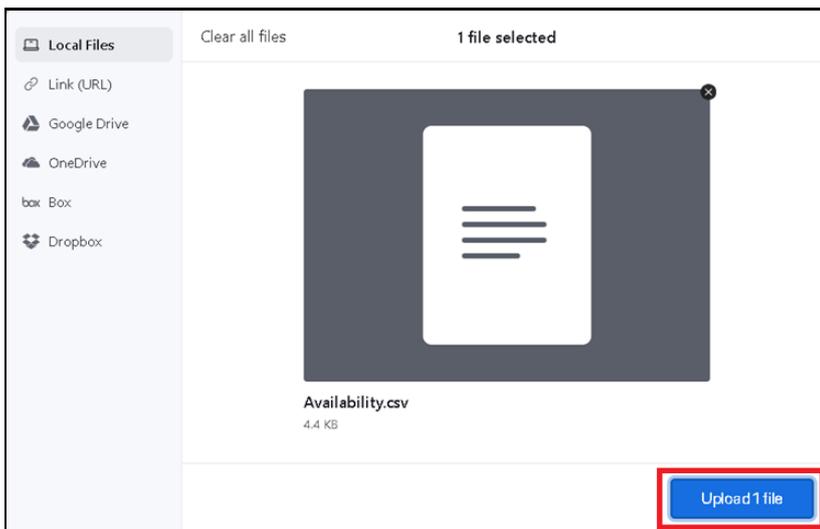
8. Click on Browse File



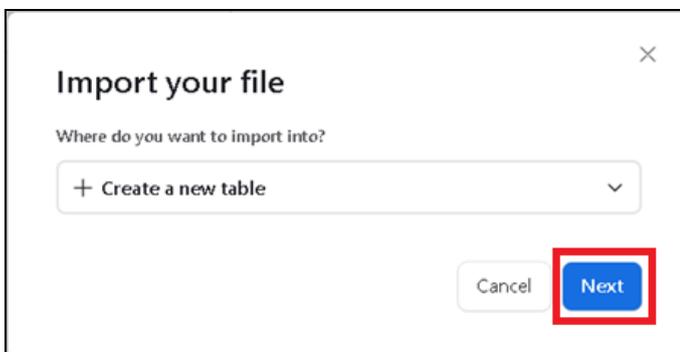
9. Select the Booking.csv file you have downloaded to your local folder.

Name	Date modified	Type	Size
Booking.csv	20/11/2025 2:36 pm	Excel.CSV	1 KB
Room.csv	20/11/2025 2:38 pm	Excel.CSV	1 KB
TimeSlot.csv	20/11/2025 2:38 pm	Excel.CSV	1 KB

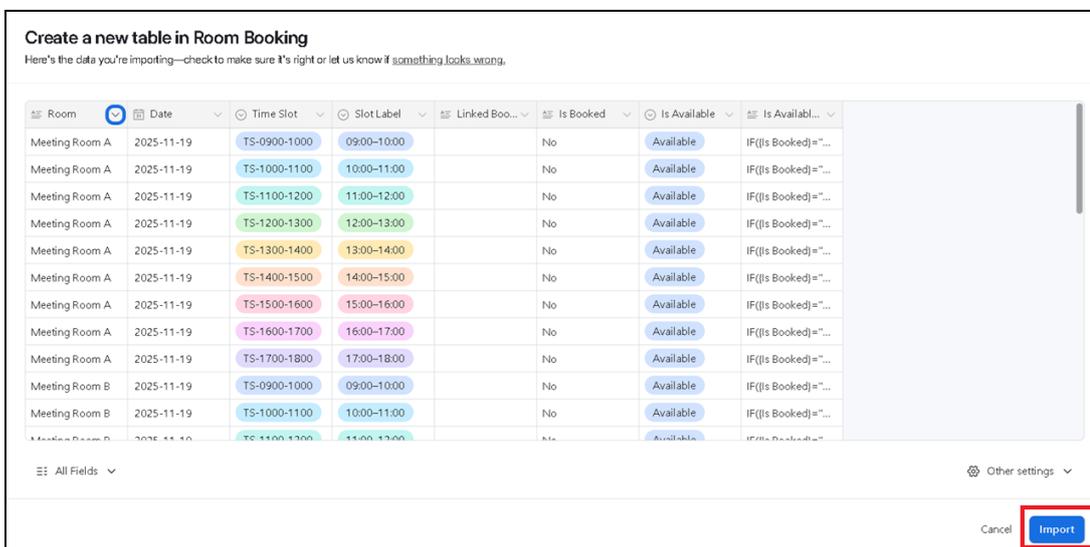
10. Click on Upload 1 File



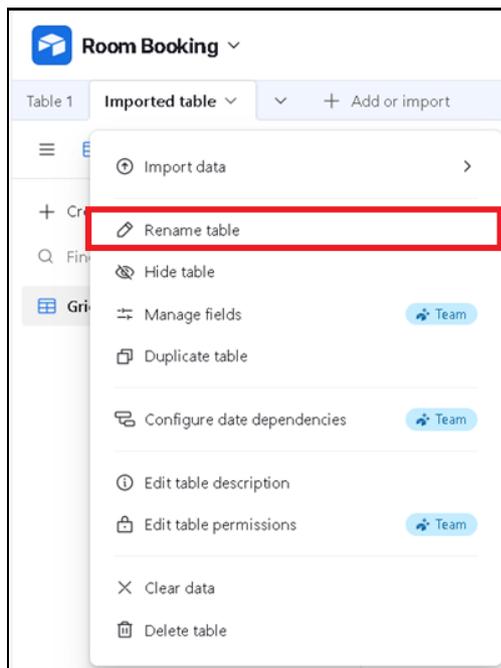
11. Click Next



12. Click Import



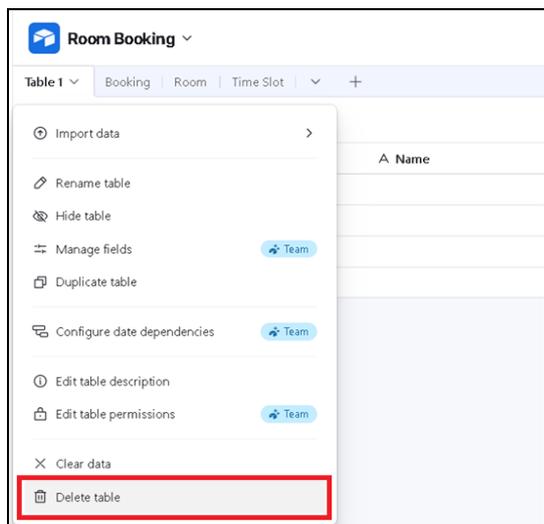
13. Change Imported table name to “Booking”



14. Repeat step 6 to 13 for Room.csv and Time Slot.csv and rename table accordingly.

15. Click on dropdown list on Table1 and select Delete.

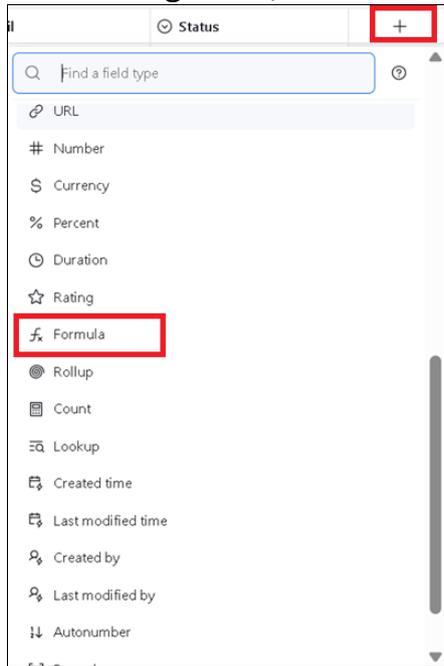
Note: Table1 is a default table created automatically by Airtable. We can safely delete it once we have created our tables.



Section B: Change Primary type & Update Table Relationship

This section is to make sure important field types and primary keys are set correctly

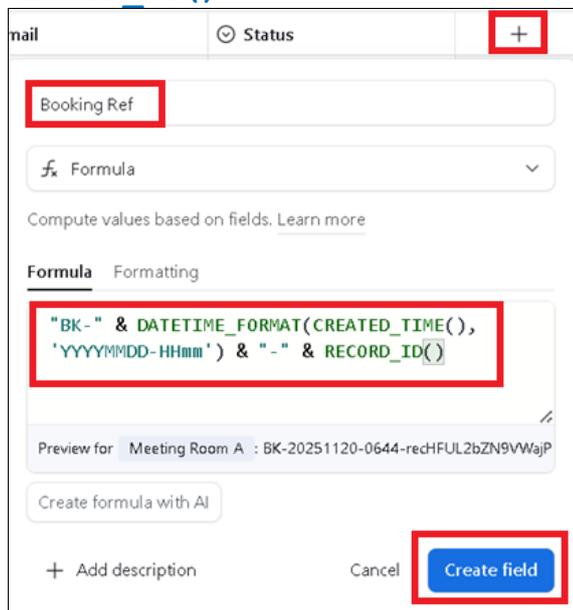
1. Select Booking Table, click on the + at the right of the table column header.



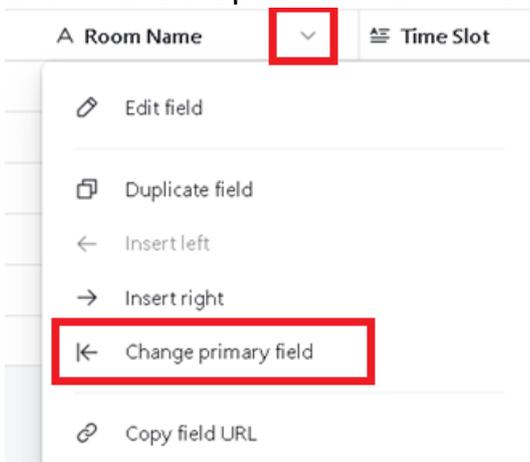
2. Enter "Booking Ref" as the field name

3. Enter the formula below in the formula column and click "Create field"

`"BK-" & DATETIME_FORMAT(CREATED_TIME(), 'YYYYMMDD-HH:mm') & "-" & RECORD_ID()`



4. Click in the dropdown arrow in Room field and select Change primary field

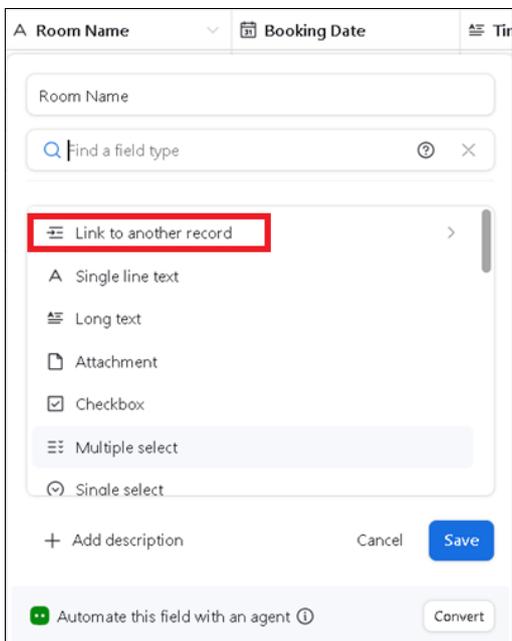


5. Select Booking Ref and click “Change primary field”



6. Click on down arrow in Room Name field and select “Edit field”

7. Select “Link to another record”



8. Select Room and click Save

A Room Name | Booking Date | Time Slot

Room Name

< Back Find a table or data set to link records from X

+ Create a new table

Existing tables

Booking

Room

Time Slot

+ Add description Cancel **Save**

Automate this field with an agent Convert

9. Set "Allow linking to multiple record" to inactive

A Room Name | Booking Date | Time Slot

Room Name

Link to Room

Link to records in the Room table.

Allow linking to multiple records **Set Inactive**

Limit record selection to a view

Filter record selection by a condition Team

Use AI to show top matches when selecting a record New

+ Add description Cancel **Save**

10. Click Confirm changes.

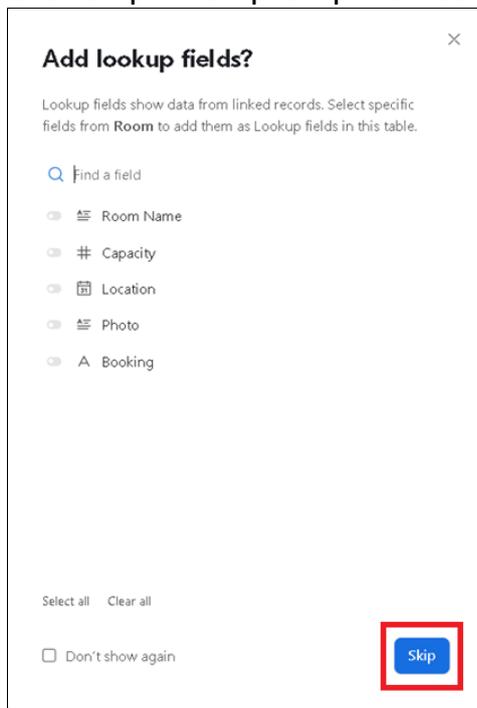
Are you sure you want to convert to this field type?

Converting to this field type may clear cell data in this field.
Pressing CTRL Z will undo changes to the field.

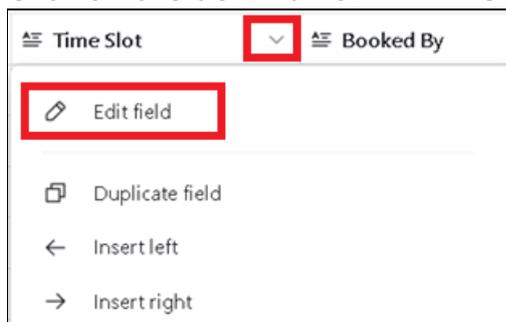
Don't show this message again

Cancel **Confirm change**

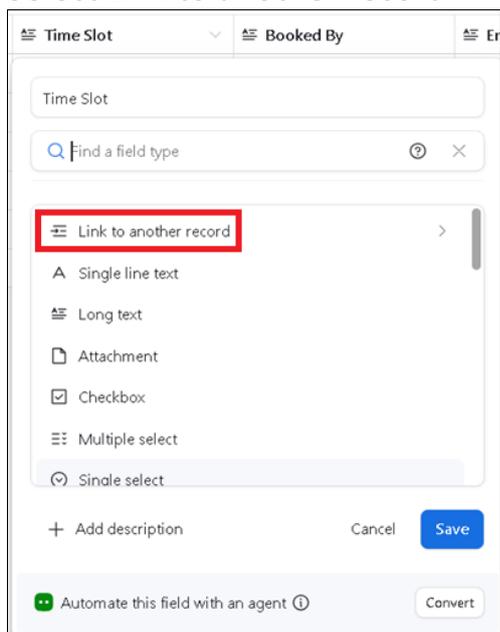
11. Click Skip when prompt for lookup field



12. Click on the down arrow in Time Slot field and select Edit field.



13. Select Link to another record



14. Select Time Slot table

The screenshot shows a configuration window for a field named 'Time Slot'. At the top, there are tabs for 'Time Slot', 'Booked By', and 'Email'. Below the tabs is a search bar containing 'Time Slot'. A dropdown menu is open, showing a search bar with the text '< Back Find a table or data set to link records from'. Below the search bar are options: '+ Create a new table', 'Existing tables', 'Booking', 'Room', and 'Time Slot'. The 'Time Slot' option is highlighted with a red box. At the bottom of the window, there are buttons for '+ Add description', 'Cancel', and 'Save'. At the very bottom, there is a section for 'Automate this field with an agent' with a 'Convert' button.

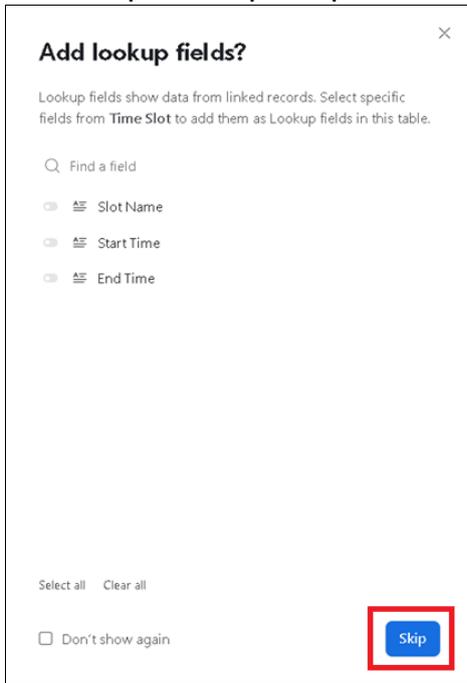
15. Set Link to multiple record to inactive

The screenshot shows the 'Time Slot' configuration window with the 'Link to Time Slot' dropdown menu open. Below the dropdown, there is a section titled 'Link to records in the Time Slot table.' with several toggle options: 'Allow linking to multiple records' (set to inactive), 'Limit record selection to a view', 'Filter record selection by a condition' (with a 'Team' button), and 'Use AI to show top matches when selecting a record' (with a 'New' button). The 'Allow linking to multiple records' option is highlighted with a red box, and the text 'Set inactive' is displayed in red next to it. At the bottom of the window, there are buttons for '+ Add description', 'Cancel', and 'Save'. The 'Save' button is highlighted with a red box.

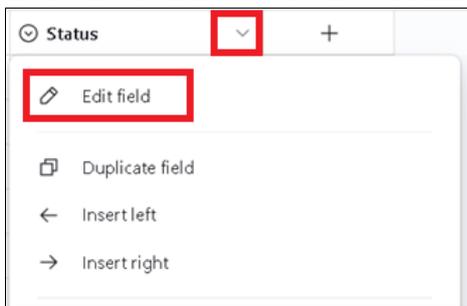
16. Click Confirm changes when you see this window.

The screenshot shows a confirmation dialog box with the following text: 'Changing the field type will impact 1 dependency and could delete this field's data in some records.' Below this text is a section titled 'Interface elements (1)' with a right-pointing arrow. Underneath, there is a warning: 'Extensions and APIs relying on this field will also be impacted. Pressing CTRL Z will undo changes to the field, but changes to dependencies can't be undone.' There is a checkbox for 'Pause alert for' with a dropdown menu set to '1 hour'. At the bottom of the dialog, there are three buttons: 'Share feedback', 'Back to configuration', and 'Confirm change'. The 'Confirm change' button is highlighted with a red box.

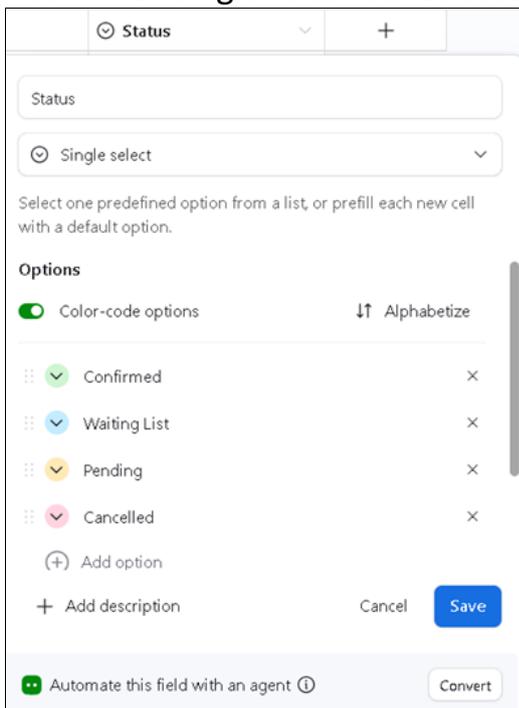
17. Click Skip when prompt for lookup field



18. Click on the down arrow button in Status field, select "Edit field"



19. Add in Pending and Cancelled status in the options and set their colours accordingly



20. Click on Room table, click on the down arrow in Photo field and select Edit field.

	Room Name	# Capacity	Location	Photo	Booking
1	Meeting Room A	10	2001-01-01 00:00		
2	Meeting Room B	8	2001-01-01 00:00		
3	Training Room	20	2001-02-01 00:00		
4	Conference Room	20	2001-02-01 00:00		
5					
+					

21. Change the field type to files and format to attachment. Then click save. And now you can attached image to Room.Photo field.

Photo

Attachment

Add images, documents, or other files to be viewed or downloaded.

Format

Files

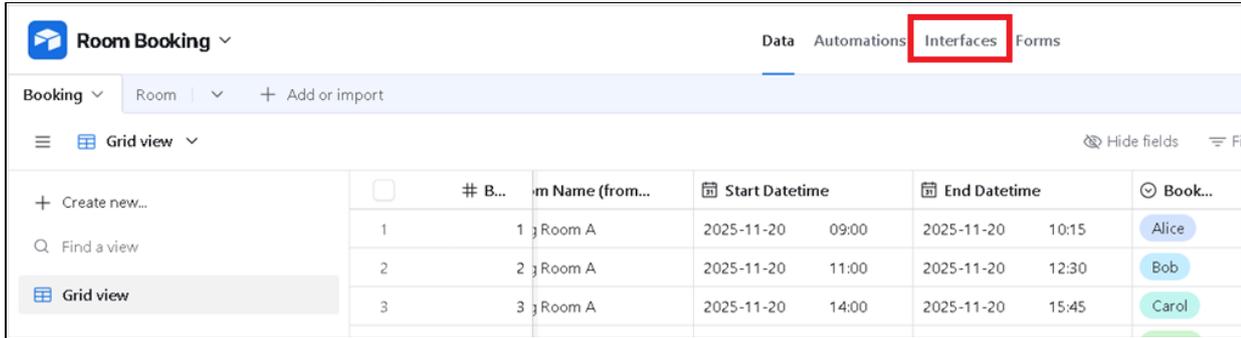
View and comment on individual files.

+ Add description Cancel Save

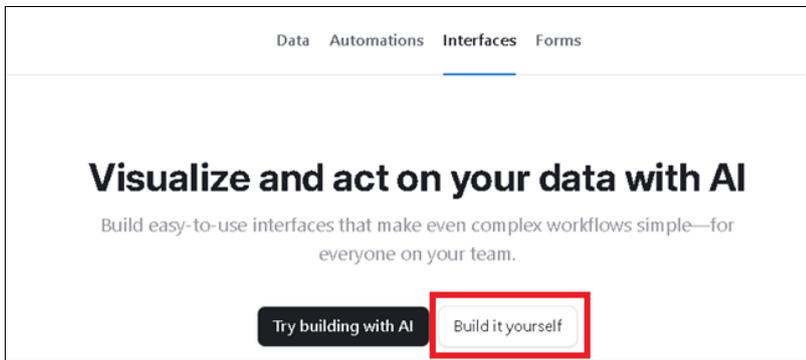
Section C: User Booking Interface (Calendar)

Steps:

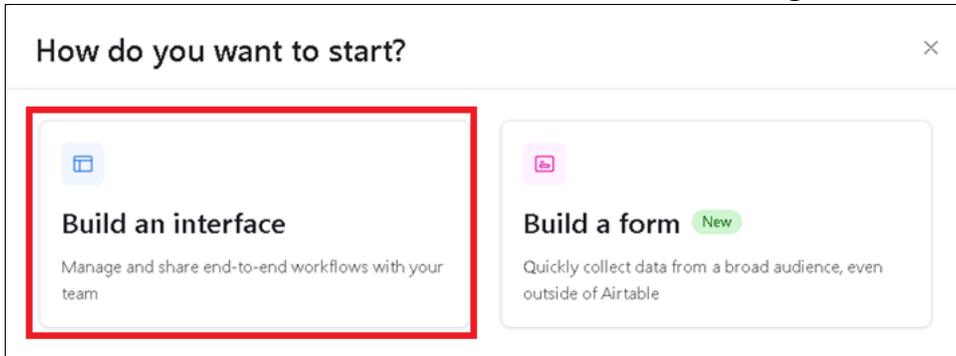
1. Click Interfaces at the top



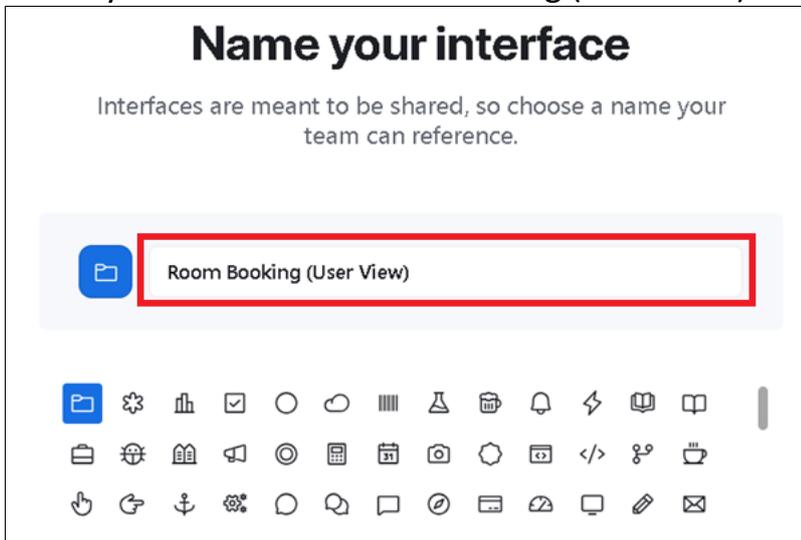
2. Select Build it yourself



3. Select Build an interface, then click Next and Next again



4. Name your interface "Room Booking (User View)" & click Next



5. In Choose Layout, select Calendar & click Next.

Choose a layout

Layouts are an easy way to get started by guiding your design and workflow. Layouts are chosen once at the start of your workflow.

- List**
Organize and prioritize.
- Gallery**
Visualize image-heavy records.
- Kanban**
Organize records into columns.
- Calendar**
Show events by month, week, or day.
- Timeline** Team
Visualize data across time.
- Custom**
Choose a custom interface extension.
- Form**
Create new records.
- Dashboard**
High-level view of your data using summaries & charts.
- Overview**
Highlight important pages and resources

Video production schedule

All records Brand BTS Animated Filter Sort

Video name	Type	Target release	Location	Status
The Waveform Team at Work	Brand BTS	9/24/24	Waimea Bay, Hawaii	Cleared
Surf Wax Poetic	Product launch	4/2/25	Skeleton Coast	Ready to cut
Almost, But Not Quite	Education	2/17/25	Reykjavik, Iceland	Ready to cut
Asla's Hidden Gem	Lifestyle	3/24/25	Sri Lanka	In negotiations
72 Hours in a Surf Shop	Viral fun	4/2/25	Gold Coast, Australia	Cleared
The World Surfing Championships	Viral fun	5/12/25	Costa Rica	Needs attention
The Final Frontier of Surfing	Education	3/24/25	Mexico	In negotiations
Waveform x CreaFALLEN	Brand BTS	2/17/25	Oahu, Hawaii	In negotiations
No OffSeason	Brand BTS	5/1/25	Huntington Beach, California	In negotiations
The Surfboard, Unleashed	Product launch	2/17/25	Ball	In negotiations

Desktop Mobile

Next

6. In Connect to table window, make sure Table is Booking, Start date field is Booking Date and click Finish.

Connect to a table

Connect your layout to a table.

Table: **Booking**

Start date field: **Booking Date**

Booking

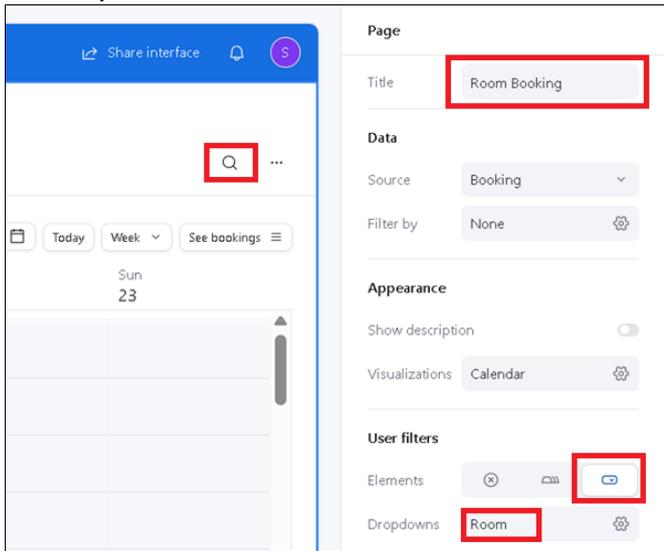
November 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

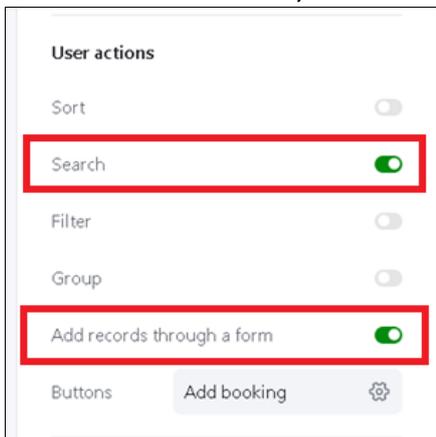
5 bookings

Back **Finish**

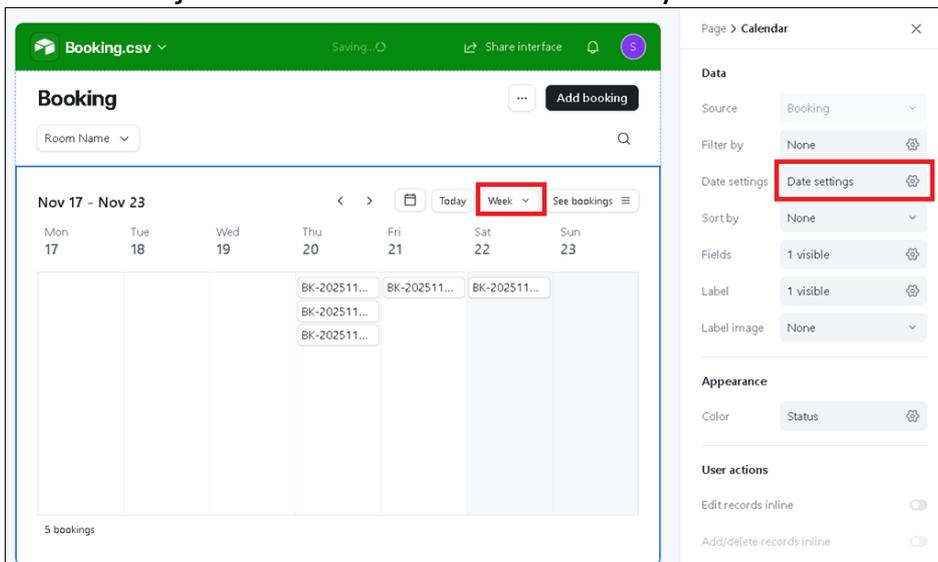
7. Click on the Filter or Search icon on the top right of the booking interface
8. Under User Filters, Elements, select dropdown
9. In Dropdowns column, select Room



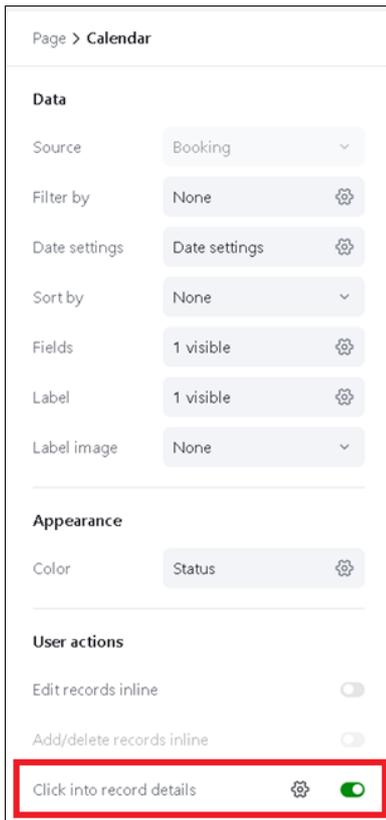
10. Under User actions, set search and Add records through a form to active.



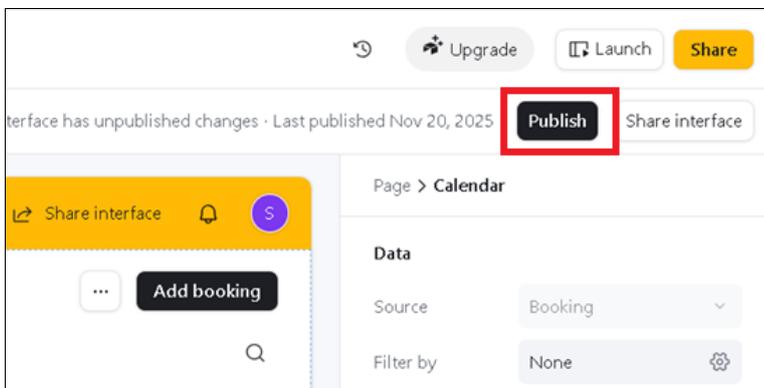
11. You can adjust the calendar to show weekly view instead of monthly view.



12. You may also turn on the “Click into record details” to enable user to see the booking details when clicked on any booking. (Optional)



13. Click Publish before we move on to create the Add Booking interface

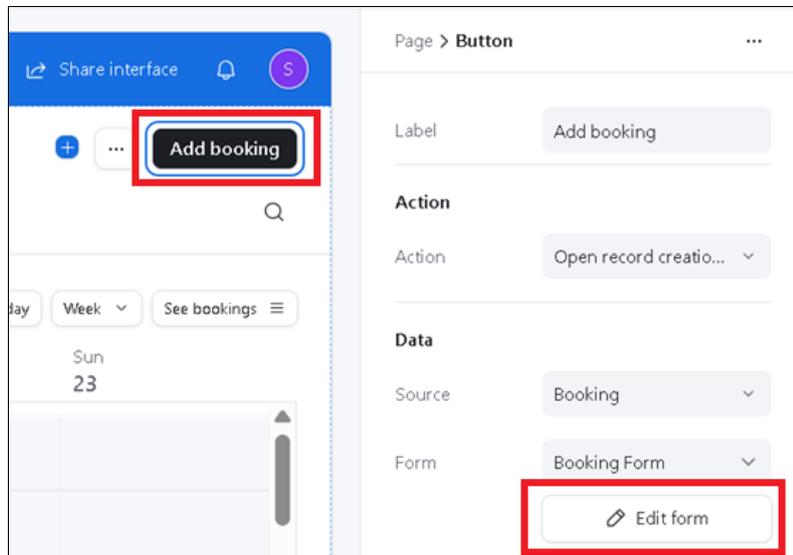


Note: Only paid plan users can make record coloring and set start & end time bar on calendar view.

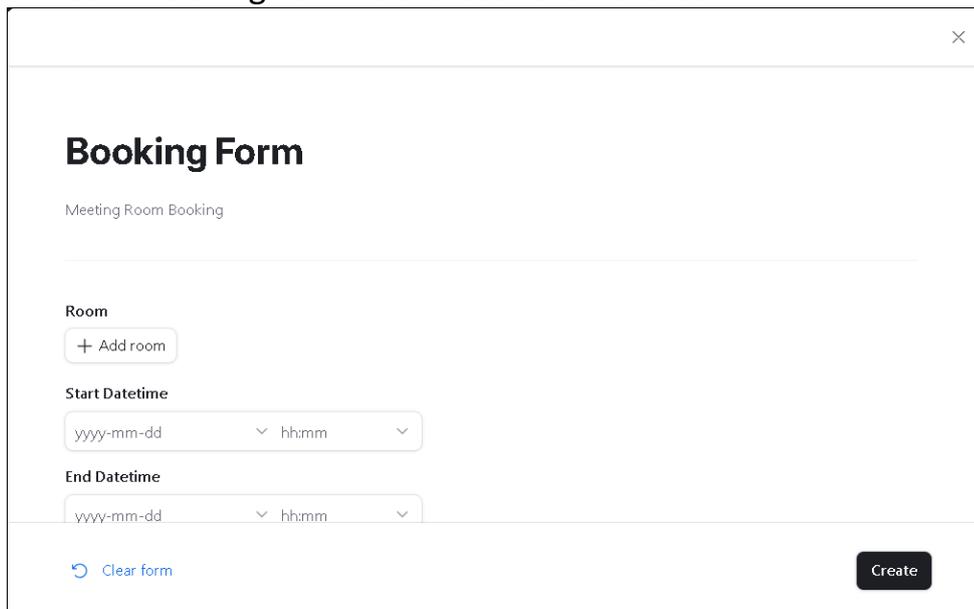
Section D: Create the New Booking Form

Steps:

14. Click on the Add Booking button on Booking Calander Interface.
15. Make sure Action is set to Open Record creation form and click Edit Form



16. A Room Booking Form is created. Click Create



The screenshot shows a 'Booking Form' configuration window. The title is 'Booking Form' and the subtitle is 'Meeting Room Booking'. The form contains the following fields:

- Room: + Add room
- Start Datetime: yyyy-mm-dd (dropdown) hh:mm (dropdown)
- End Datetime: yyyy-mm-dd (dropdown) hh:mm (dropdown)
- At the bottom left, there is a 'Clear form' button.
- At the bottom right, there is a 'Create' button.

Note: You must Publish the Calendar view before you can create the Add Booking Form.