

package.md

03-airtable-path/airtable-path-walkthrough.md

PS> boring fix lead-followup

status: practical, transparent, no hype

Airtable Path Walkthrough

This path is for people who want a lightweight CRM without adopting a heavier sales platform.

terminal

Fillout or Tally

→ Airtable

→ Zapier or Make

→ Gmail / Outlook

What you will build

An Airtable base that stores leads, tracks follow-ups, and gives the operator views for what needs attention today.

Recommended Airtable tables

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Leads

Follow-Ups

Message Templates

Services

Settings

Leads table fields

Field	Type
Lead Name	Single line text
Email	Email
Phone	Phone number
Source	Single select
Service Requested	Single select or text
Original Message	Long text
Status	Single select
Priority	Single select
Last Contacted At	Date/time
Next Follow-Up At	Date/time
Assigned Owner	Collaborator or text
Missing Info	Long text
AI Summary	Long text
Notes	Long text

Recommended views

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New Leads

Needs Follow-Up Today

Waiting on Customer

Quoted

Won

Lost

Dormant

All Leads

Step 1 – Create the base

Create a base called:

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Boring Follow-Up System

Add the tables and fields above.

Step 2 – Create the intake form

Use Fillout or Tally.

Recommended form fields:

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Name

Email

Phone

Service requested

Timeline

Message

If using Fillout, connect directly to Airtable where possible. If using Tally, use Zapier or Make.

Step 3 – Create the automation

Zapier or Make recipe:

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Trigger: New form submission

Action 1: Create Airtable record

Action 2: Send confirmation email

Action 3: Send internal notification

Action 4: Create follow-up record or set Next Follow-Up At

Step 4 – Create the operator dashboard

At minimum, create views for:

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New Leads
Needs Follow-Up Today
Waiting on Customer

The operator should not have to search through all records to know what needs attention.

Step 5 – Test with fake leads

Submit fake leads for:

- normal inquiry
- missing phone
- missing service requested
- duplicate email
- urgent request

Confirm each one lands in the correct view.

Common mistakes

Symptom	Likely cause	Fix
Record lands but status is empty	Status field not mapped	Set default status to New
Follow-up view empty	Next Follow-Up At is blank	Add automation step or formula
Email draft uses wrong field	Form field renamed	Remap field in automation
Team ignores Airtable	No daily view/reminder	Add notification and owner field

> boring systems_implementation package draft