## Airtable Project Management Tool

Airtable is a great (and free!) Project Management Tool, that keeps all your budgets, task checklists, group contacts, etc. in one place.

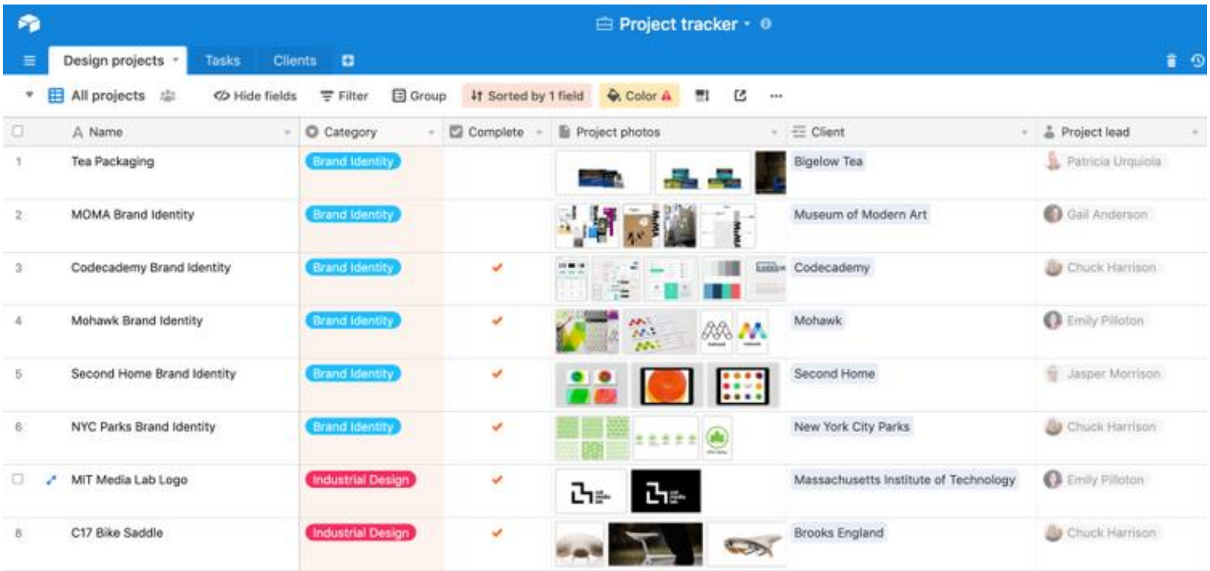
We've created a Community Sponsorship Plan template to get you started:

1. Click here: https://airtable.com/shrh7cKx3w22JPjTd
2. In the top-right corner, select Copy Base
3. Create your free Airtable Account
4. You will have an opportunity to invite other group members to your workspace
5. Your Community Sponsorship Plan will appear on your homepage, under "My First Workspace"
6. To share this plan with other group members, click Share in top-right corner, and add their email addresses

***IMPORTANT: It is important to be mindful of what information you are sharing with who. You may want to create a separate, private Airtable to keep sensitive data, such as group member contact details and registration forms – and only share this with the people who need to know***

You can use our Volunteer Information template here: https://airtable.com/shrF3ADK3745JR8ss

Follow the same instructions as above to create a copy.

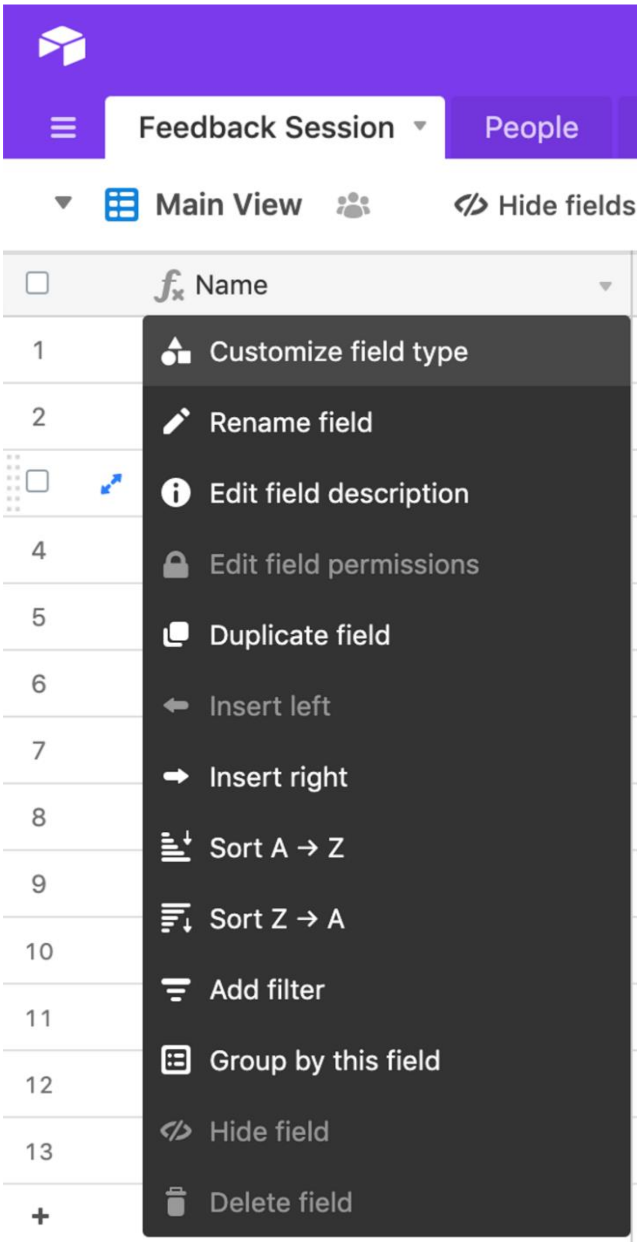



## Editing Airtable

**How to Customise your Columns:**

In your newly created table, you may want to change the functionality of the columns. For instance, you may want a column for DBS documents, where you can upload document attachments. To do that:

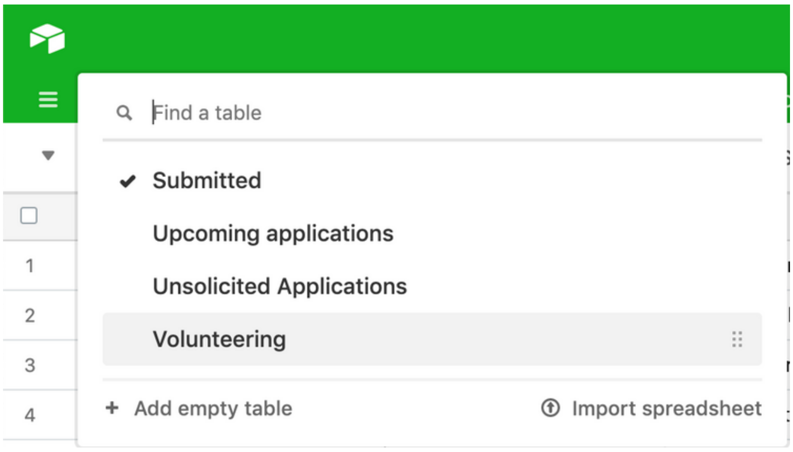
- Click on the small arrow on the right in the row (in this case "fx Name")
- Click "Customize field type". This will then allow you to pick from things like "email address", "phone number", "text" etc.
- In the same dropdown menu, you are also able to rename the field, duplicate, add filters etc.



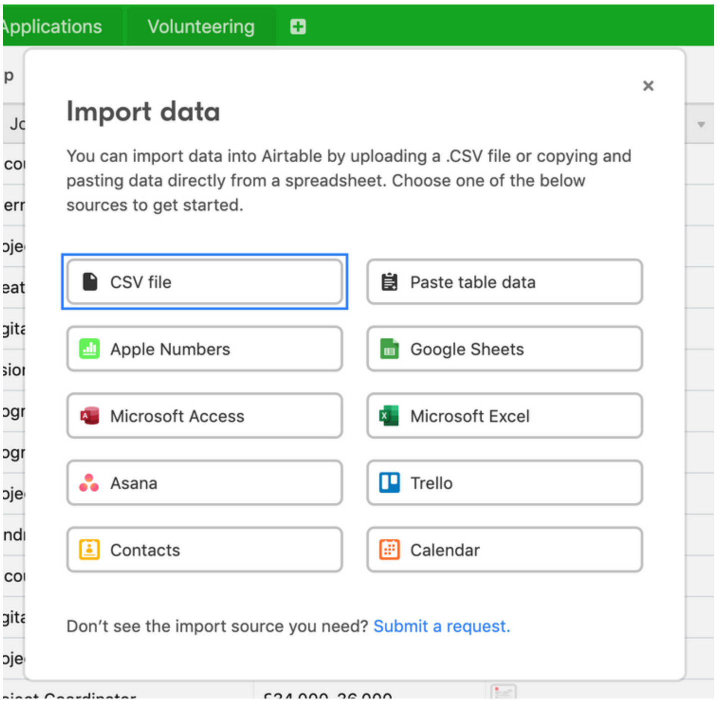
**Importing an existing document or spreadsheet**

Perhaps you wish to use a template you are familiar with but which exists in an Excel spreadsheet.

- Click on the lines in the top left corner and the below box appears:




Press "Import spreadsheet" in the bottom right corner and the below box will appear:




As you can see, you are able to import from a range of sources.

Note that if you wish to use a formula as you would in Excel, this is done by customising the field type (see above - How to Customise Columns).

**Interlinking**

You may also want to interlink some of the tabs. Example: Mary Smith is one of the volunteers and she is in the overview of group members. You may then want to allocate a task to her or simply add her record in a particular tab. We recommend you watch this video which explains how to do this step by step.

**How to invite other users**

We recommend that all (core) group members have access to your tables and records. To do that, you go to the top right corner and click on the blue icon >> click on "Tell a friend". Enter their email address and simply press send and your colleagues will automatically receive a notification to sign up.