

Intake on-the-Go Airtable Setup Guide

Step-by-Step Instructions for Connecting Your Database

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What You Will Need

To use Intake on-the-Go, you need to connect it to an Airtable database where your client information will be stored. This guide walks you through every step, from creating your free Airtable account to connecting it to the app. The entire process takes about 10-15 minutes.

Good news: Airtable is free to start. The free plan includes 1,000 records, which is plenty for most organizations getting started.

You will complete three tasks: (1) Create an Airtable account, (2) Copy our pre-built template, and (3) Create an API key to connect the app to your database.

Part 1: Create Your Airtable Account

Step 1

Open your web browser and go to airtable.com/signup

Step 2

Enter your name, email address, and create a password. Click **Sign Up**.

Step 3

Airtable will ask you some setup questions about your team and what you would like to do. You can answer these questions or skip them. We will set up everything you need in the next part.

Step 4

Check your email inbox for a verification email from Airtable. Click the verification link in the email. **This is required** — you will not be able to create an API key later if you skip this step.

Important: You must verify your email address before you can create an API key in Part 3. If you do not see the email, check your spam/junk folder or click 'Resend verification email' in Airtable.

Part 2: Copy the Intake Template

Instead of building a database from scratch, you will copy our pre-configured template that already has all the fields you need for client intake.

Step 1

Open a new tab in your browser and go to:

airtable.com/appC3w115filonURd/shrxnwfiPaLgP8ZFT

Or click the 'Open Template' button in the app (Step 2 of the setup process).

Step 2

You will see a page titled '**Intake on-the-Go - Client Intake Template**' with a '**Copy base**' button near the top of the page.

Step 3

Click '**Copy base**'. If Airtable asks you to choose a workspace, select your default workspace or create a new one.

Step 4

The template will be copied into your Airtable account. You will see a table called '**Clients**' with columns for First Name, Last Name, Date of Birth, Gender, and more. This is where your client data will be stored.

Tip: Keep this Airtable tab open — you will need it for the next two parts.

Part 3: Create Your API Key

An API key (also called a Personal Access Token) is like a password that lets Intake on-the-Go read and write data in your Airtable database. Follow these steps carefully.

Step 1

In your Airtable tab, look at the **bottom-left corner** of the page. You will see a **black circle** with the first letter of your name inside it. Click that button.

Step 2

A menu will appear with several options. Click '**Account**' to open your Account Overview page.

Step 3

Scroll down on the Account Overview page until you see a section labeled '**API**' near the bottom.

Step 4

Click the blue button that says **'Go to developer hub'**.

(Some accounts may show **'Builder hub'** instead — they are the same thing.)

Step 5

You will see a page that says **'You have no personal access tokens.'** Click the **'Create token'** button.

Step 6

In the **'Name'** field, type exactly: **Intake-on-the-Go**

Type the name exactly as shown, including the dashes and capital G.

Step 7

Under **'Scopes'**, click **'+ Add a scope'** and select **'data.records:read'**.

Then click **'+ Add a scope'** again and select **'data.records:write'**.

Step 8

Under **'Access'**, click **'+ Add a base'** and select your **'Intake on-the-Go - Client Intake Template'** base from the list.

Step 9

Click the **'Create token'** button at the bottom of the page.

Step 10

Your token will appear on screen. It starts with **'pat...'** followed by a long string of letters and numbers.

IMPORTANT: Copy your token immediately! Airtable will only show it once. If you close this page without copying it, you will need to create a new token. Paste it somewhere safe (like a note on your phone or a document) before moving on.

Part 4: Find Your Base ID

The Base ID tells the app which database to connect to. It is easy to find.

Step 1

Go back to your Airtable tab where your copied template is open. If you closed it, go to **airtable.com** and click on your **'Intake on-the-Go - Client Intake Template'** base.

Step 2

Look at the **URL in your browser's address bar** at the top of the page. It will look something like:

airtable.com/app71g6mphpmQkspr/tblxxxxxxx/...

Step 3

Your Base ID is the part that starts with **'app'** — in this example, it would be **app71g6mphpmQkspr**.

Copy just that part (everything between 'airtable.com/' and the next '/').

Another way to find your Base ID: Click the **Help** icon (question mark) in the top-right corner of Airtable, then click **'API Documentation'**. Your Base ID will be shown on the page that opens.

Part 5: Connect the App

Step 1

Go back to the Intake on-the-Go app (Step 4 of the setup process).

Step 2

Paste your **Personal Access Token** (the 'pat...' code you copied) into the first field.

Step 3

Paste your **Base ID** (the 'app...' code you copied) into the second field.

Step 4

Click **'Connect'**. You should see a green message that says **'Connection successful!'**

Step 5

Click **'Save & Continue'** or **'Continue'** to finish setup. You are now ready to start using Intake on-the-Go!

If the connection fails: Double-check that you copied the entire token and Base ID without any extra spaces. Make sure your token has both 'data.records:read' and 'data.records:write' scopes, and that your base is selected under 'Access'.

Troubleshooting

Problem	Solution
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'Create token' button is disabled/grayed out	Verify your email address first. Check the yellow banner at the top of the Airtable page.
'Invalid name' error when creating token	The token name must be unique. Try adding a number, like 'Intake-on-the-Go-2'
Connection failed in the app	Make sure you copied the full token and Base ID without extra spaces. Check scopes and access.
Can't find the black circle avatar button	It may be in the top-right corner instead. Look for your profile initial in either corner.
'Failed to fetch tables' error	This has been fixed in the latest version. Update the app or clear your browser cache.

Need Help?

Watch our video tutorial: youtube.com/watch?v=aO_pxfZA7b0

Visit our website: intakeonthego.com

Email us: info@aohministry.org

Intake on-the-Go connects to Airtable as a default data storage option for your convenience. We are not affiliated with, sponsored by, or compensated by Airtable. You may use any compatible database of your choosing.

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