

# Airtable Cleanup - Formal Feedback

## Explanation

### Current Icons

to distinguish bases

### SCISSOR

for bases that are no longer relevant (assumed) or do not function

Example:

✂

Ultrasound - Club Surgical Centre | Patient Information and Admissi...

⚠

Ultrasound - Club Surgical Centre | ...

Estimates Dashboard

Bookings Dashboard

Admissions Dashboards

Theatre List

Food Planning Dashboard

Print Admission Forms

New Estimates

Table deleted

### FOLDER

for bases that currently serve as a data repository  
hence requires no Airtable specific functionality required

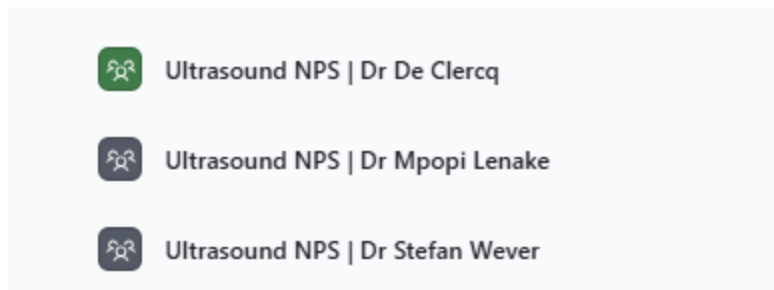
## Example:

	A Name	Winner	A Overall Score	Website URL	UX Test	A Website Performance	Screenshots	Brand/70	Chat GPT Readab
1	Dr. Nico Coetzee	Derryn	3	<a href="https://www.general-surgeon.co.za/index.html">https://www.general-surgeon.co.za/index.html</a>	★★★★			★★	
2	Dr. Jané La Grange	Nicole	3	<a href="https://www.dijlagrange.co.za/">https://www.dijlagrange.co.za/</a>	★★			★	
3	Dr. Gawie de Villiers	Paton	4	<a href="https://drgawie.co.za/blog/">https://drgawie.co.za/blog/</a>	★★★★			★★★	
4	Dr. Rob Dachs	Nicole	4	<a href="https://www.robdachs.co.za/">https://www.robdachs.co.za/</a>	★★★★			★★	
5	Dr. Liana Roodt	Derryn	5	<a href="https://casebreastsurgeon.co.za/">https://casebreastsurgeon.co.za/</a>	★★★★★			★★★★★	
6	Dr. Ferdi Marais	Paton	5	<a href="https://www.helderbergurology.co.za">https://www.helderbergurology.co.za</a>	★★★★★			★★★★★	
7	Dr. Michelle Maree	Paton	6	<a href="https://www.drmichellemaree.co.za">https://www.drmichellemaree.co.za</a>	★★★★★			★★★★★	
8	Dr. Dewald Coolen	Derryn	7	<a href="https://drcoolen.co.za/">https://drcoolen.co.za/</a>	★★★★★			★★★★★	
9	Dr. Liz Hugo	Derryn	8	<a href="https://drelizabethhugo.co.za/">https://drelizabethhugo.co.za/</a>	★★★★★			★★★★★	
10	Dr. Peter Hardcastle	Paton	9	<a href="https://orthopaedichealth.co.za">https://orthopaedichealth.co.za</a>	★★★★★	This site is a benchmark		★★★★★	
11	Dr. Johann De Wet	Paton	9	<a href="https://derminstitute.co.za">https://derminstitute.co.za</a>	★★★★★	This site is a benchmark		★★★★★	

(some of which technically also SCISSOR items since base inactive for extended period of time)

## GROUP

bases that can be combined



Example:

-> Ultrasound NPS |

Summerhill

(assumes all these docs work here but just to illustrate point)

NOT COMPLETE

will reconsider after first wave of clean up

may be that majority of boards fall into one of above categories and grouping hence irrelevant

## Future Icons

## LOCK

development done

base version

## WRENCH

still in development

# Suggestions

## for workspace management

move unused boards to other workspace (not on paid plan since all functionality not required)

### "FOLDER" items

1. to personal workspace
2. to shared Google Sheet / Smart Sheet

### "SCISSOR" items

1. to separate workspace
2. export data and store on shared Google Drive

FOLDER: Airtable Data Repository

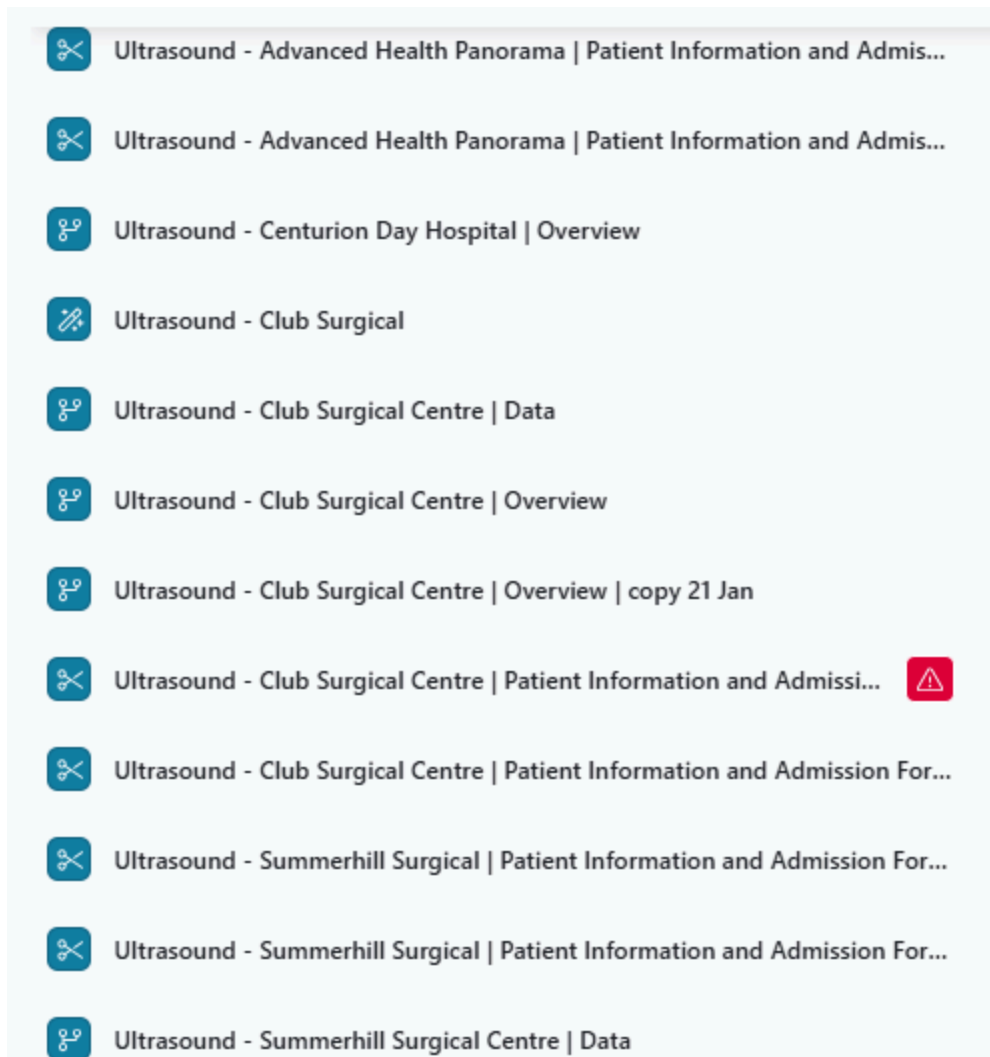
FOLDER: Client Name

FILE: Base Name

### "GROUP" item

1. combine

### other



significant amount of duplication

## for standardization in future

### Colour

too difficult to manage

### Icon

any (for those rolled out per client) else LOCK / WRENCH depending on status

## Naming Convention

Client | Template (Generic Board) Name - additional details if needed | version

### Views

lock any views that have automations or extensions which depend on them with detailed explanation / reason eg. automation xyz

## for version control

base versions (LOCK symbol) not altered

rather duplicate and create v(+1)

or implement change made in all other bases from which this one stemmed

CRTICAL

indicate version of base used when duplicated and rolled-out / applied to client

## for data management

move to proper database storage solution from which dashboards, forms ect generated

- able to access all data for each client in one location
- boards do not get overly complex
- scalable
- able add features in simpler manner (method by which Airtable link records complicates matters when changes want to be made)
- version control much easier (to maintain and roll out)

START WITH “data dump” - move to PostgreSQL database

then move other and design necessary dashboards / user interfaces

UI used depends on “use case”