

## The Purpose

An effective means of managing requests for help from communities during the Coronavirus outbreak.

It is particularly suited to communities which are between 100 and 10,000 homes where chat/social groups become difficult to manage, but the community is too large to be overseen by a few Admins. In time, larger communities can be broken down into smaller groups if need be. So Counties to Districts to Parishes to Neighbourhoods.

It is not perfect, but it is built on three enterprise-level softwares which are all encrypted, secure and, best of all, we use the FREE versions of each.

## It Is Not...

- A replacement for medical help: if anyone has medical concerns we point them to 111 or 999 (in the UK)
- A 100% system: we do not expect everyone in the Area to register with the site, but hope that all who can help will, and all who need help can
- A 24/7 system: we ask Helpers to be prompt in responding, but it is not there for the 2am 'call'
- A 'system to rule them all': it is a safety net for those who have no-one to reach out to, or those where their normal Helper is unable to help. Our intention is to connect people who will become the 'go to' Helpers for individuals in the community

## Why This Solution?

There are lots of people working on solutions at the moment, we have no idea whether this is the best, but it works and more local communities are adopting it.

It was born out of recognising the limitations of Facebook Groups and WhatsApp, which have these challenges:

1. They have trouble scaling when more than 50 are involved
2. The most vulnerable groups are the least likely to access them
3. They should not be the forum for sharing any sensitive personal information

Whereas this solution is...

### 1. Scalable

The nature of the software we use means that it can handle any number of requests and can be easily repurposed to handle more if needed.

### 2. Accessible

For those offering and receiving help, it's just a simple web-form that is used which, if needed can be filled out on behalf of the person needing help.

### 3. Secure

Personal data is held in a secure encrypted way, and is only Viewed by a small number of vetted Admins. Signups have to give their address and personal contact details. Matches are tracked so names are only shared when matched.

# Before We Start

So, before we start, here is what you need in terms of human resources to manage it:

1. A **technology literate** individual who will be able to set it up - they have to be familiar with email setup, how databases work, and know what an API is.

They do not have to be a developer or programmer, but they need to be confident in reading this document that they can do it (or at least explore it). If you do not have that person, then *find them first!* We can help, but this will need to be occasional and ad-hoc.

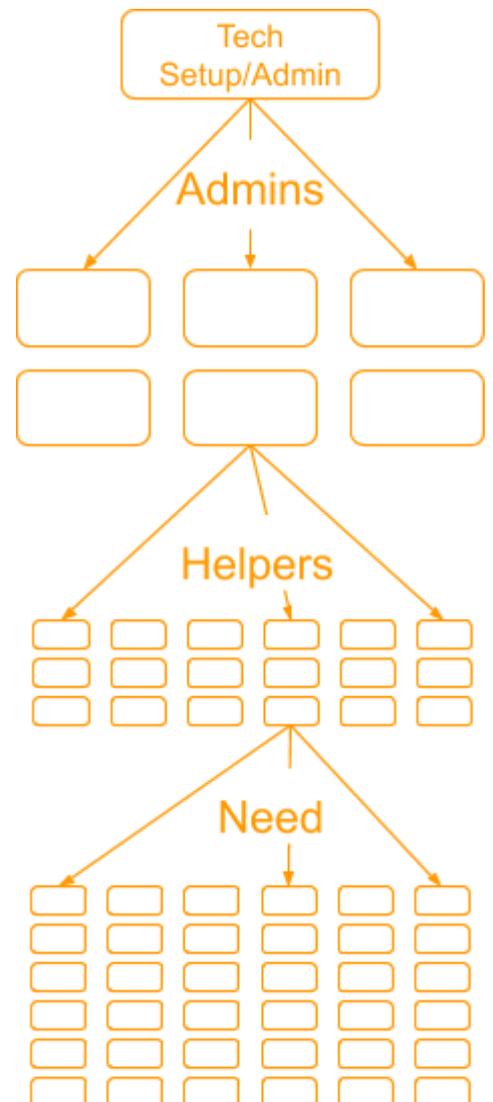
2. A number of **Administrators**, ideally several, to help you manage the requests which will probably increase over time. The system we have setup means oversight can be from more than one person as it is all realtime, which means again we can avoid any bottlenecks.

The Admins must be well known in the community, ideally of good standing, even better with DBS-checks already in place (I have two!)

3. A willing set of **Helpers** and volunteers, ideally they could be reached through one or more Facebook groups or by WhatsApp or just networking through the local community.

4. A significant **number of homes** in the community being covered. Our community is around 500 homes, but we believe this system could cover more if needed.

If you think you have these resources to hand, then read on.



## How It Works for the Various Users

The system has been setup to be as easy to use as possible for ALL the different groups.

1. Those who **have need** just have to do one thing: fill out a web form.  
They don't need a smartphone or a Facebook or WhatsApp account. They can even ask someone else to fill out the form on their behalf.
  
2. Those who **want to help** just have to do two things:
  - a. Fill out a web form to sign up and register
  - b. Wait for an email to alert them to the contact

They can, if they want, join the Facebook and WhatsApp groups, but they do not have to. More importantly, if they join these groups, this is for general discourse and NOT to manage individual requests

3. Those who **Administrate** just have to do three things:
  - a. Keep an eye on new requests for help
  - b. Identify the best Helper based on availability, skill and location and delegate the request
  - c. Ensure that the request is completed
  
4. Those who **setup** have to invest time up front to get it going, but after that, they can just keep an eye on it and adjust if needed.

# Setup

You will need to setup accounts for these three softwares in the order below:

- [Gmail](#)
- [Airtable](#)
- [Zapier](#)

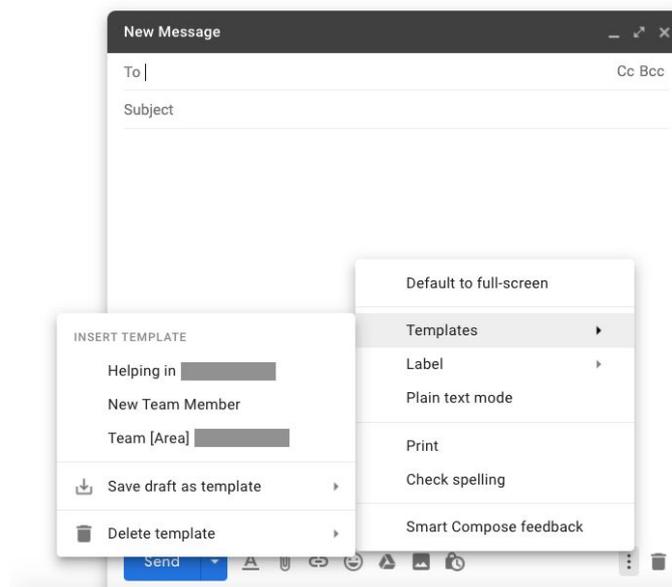
We have also setup a WhatsApp group for the Helpers and a separate one for the Admins. This is a really useful as a backup of this process but NOT as a means of asking for help (it is Helpers only!) and just to encourage one another and deal with the odd leftfield request.

## Gmail Setup

I am not going to walk this through in detail with screengrabs. Why? Because, if you can't setup a Gmail account then you will need stronger technical support to get this running. Gmail is the easy one of the three, Airtable harder, Zapier harder still.

You can use another email account, but given the multiple users and the integration of Zapier for Gmail and it's versatile API, I would strongly recommend Gmail.

1. Setup Gmail here:  
<https://mail.google.com/>
2. Create an account which is for your community with a name they will recognise, so for my demo [OxonHelp@gmail.com](mailto:OxonHelp@gmail.com) may work (it may be taken, of course) as it is a community in Oxfordshire
3. Learn how to setup mail templates, these are not needed, but are helpful if you are going to send similar emails to a number of recipients. To get these going you need to go to:  
Settings Menu / Advanced / Templates / On
4. Once you do this then you can setup email templates to avoid too much copy and pasting (there is a video coming)



Other than that, Gmail is done for the time being.

## Airtable Setup

So, now you have a Gmail account you can setup an Airtable Account using that Gmail account (I said there was an order to this!).

### 1. Open an Airtable Account

You can find it here: <https://airtable.com/>, it is going to be the hub of the Admin activity.

### 2. Import the Demo Base

You can set it up from scratch, but the Quicker way is to import the shared example base in from here:

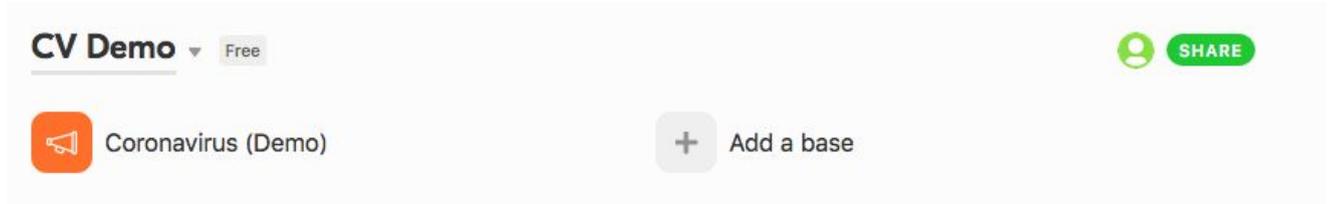
<https://airtable.com/universe/expxcL2WbytP0H32i/coronavirus-community-response-for-the-isolated-and-vulnerable>

Or search for it in Universe (<https://airtable.com/universe>) which is a repository of a wide range of applications of Airtable.

You add it using this button, and then once in your account, it is your copy to 'adjust as you see fit'.



It will appear in your Airtable looking like below, you can rename it if you want. Better still it is now unique to you - all the links for forms, API, etc. are all just for you, so you can follow this walkthrough without fearing that you will affect other bases accidentally.

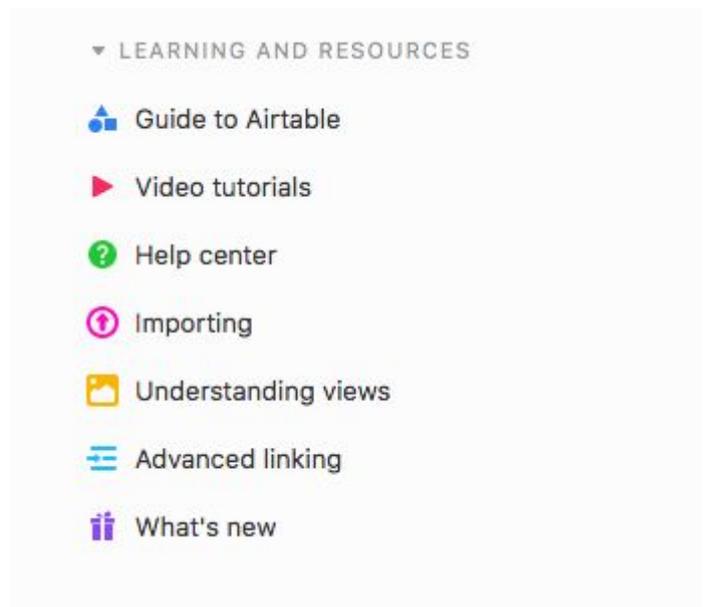


### 3. Help with Airtable

If you have not used Airtable before then I recommend you take it in a little, learning the hierarchy and the naming used (Workspace // Base // Tables // Views) it will make life easier as you try to manage these enquiries.

In the side menu when you login you can see various items, I would strongly recommend looking at most of these, but in particular:

- Video Tutorials
- Understanding Views
- Advanced Linking



If there is significant demand for this, I may well come up with specific videos, but for now this document is the best guide for setup.

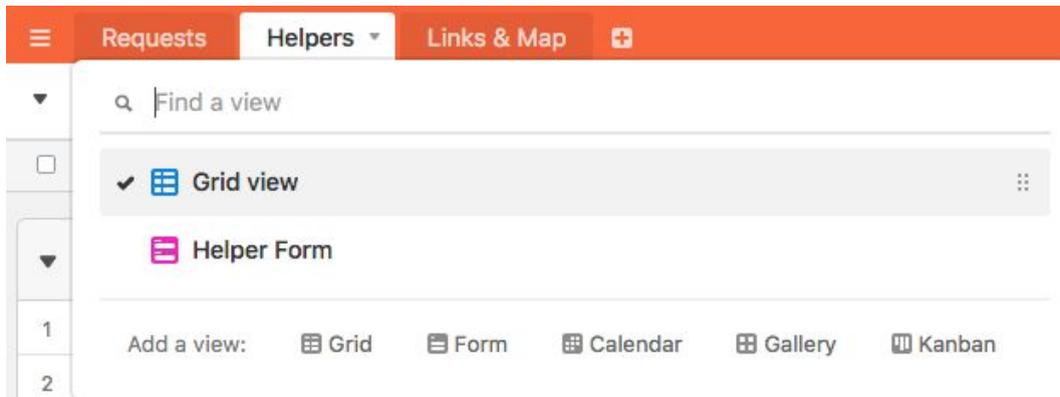
### 4. Understanding the Setup

Based on the purpose as detailed already, the purpose of this is to match Requests for Help to those people who have Offered to Help. So you can see that there are two main Tables - **Requests** and **Helpers**, the third Table (Links) is just to store the shorter links for recall like this (it isn't needed to make this work, just useful).

	Requests	Helpers	Links & Map	
	Grid view	Hide fields	Filter	Group
	Sort	Color		
□	A Name	Airtable link	Shorter Link	Attachments
1	Helper Link	<a href="https://airtable.com/shrsTMPsoxZMbcG3f">https://airtable.com/shrsTMPsoxZMbcG3f</a>	<a href="https://short.ly/oxonhelper">https://short.ly/oxonhelper</a>	
2	Offer to Help Link	<a href="https://airtable.com/shrrTYX9NBA5RIH71">https://airtable.com/shrrTYX9NBA5RIH71</a>	<a href="https://short.ly/oxonneed">https://short.ly/oxonneed</a>	
3	Region Map			
+				

## 5. Helpers

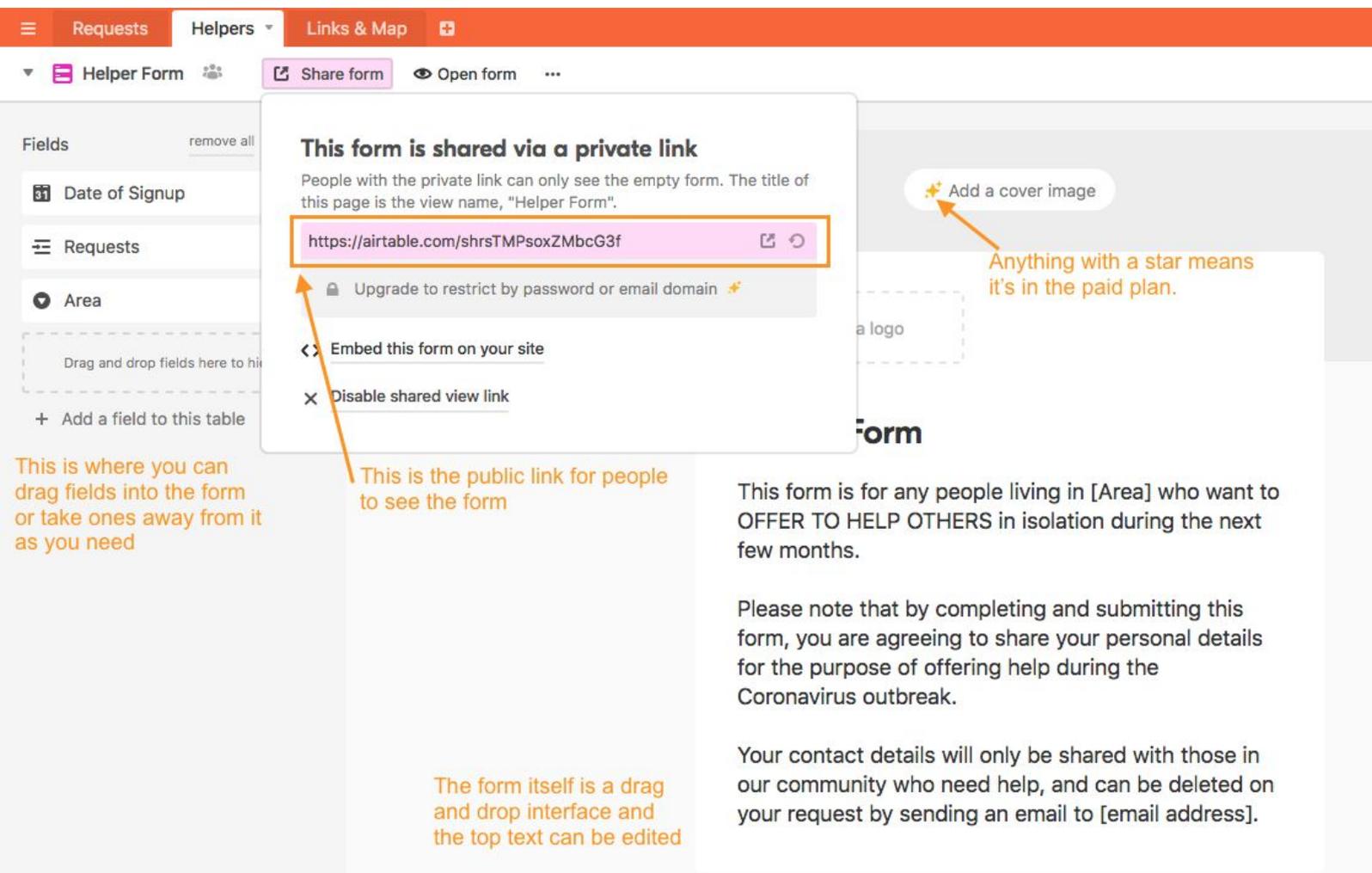
This is where you coordinate your Helpers, you can see there are two Views:



- **Grid** is where you will need to manage their data
- **Helper Form** is the form you share to encourage people to sign up for help

### Helper Form

This is the form you share for people to help, it is published in this way:



**This form is shared via a private link**  
 People with the private link can only see the empty form. The title of this page is the view name, "Helper Form".

<https://airtable.com/shrsTMPsoxZMbcG3f>

Upgrade to restrict by password or email domain

Embed this form on your site

Disable shared view link

Add a cover image

Anything with a star means it's in the paid plan.

This is where you can drag fields into the form or take ones away from it as you need

This is the public link for people to see the form

The form itself is a drag and drop interface and the top text can be edited

This form is for any people living in [Area] who want to OFFER TO HELP OTHERS in isolation during the next few months.

Please note that by completing and submitting this form, you are agreeing to share your personal details for the purpose of offering help during the Coronavirus outbreak.

Your contact details will only be shared with those in our community who need help, and can be deleted on your request by sending an email to [email address].

We normally recommend a 'shorter link' to make it easier to share, but the longer link will work. Suggest [u.nu](https://u.nu) or [bit.ly](https://bit.ly) as being two good alternatives for shorter links. The form looks very similar to what you see in Airtable without the navigation and sharing elements:

## Helper Form

This form is for any people living in [Area] who want to OFFER TO HELP OTHERS in isolation during the next few months.

Please note that by completing and submitting this form, you are agreeing to share your personal details for the purpose of offering help during the Coronavirus outbreak.

Your contact details will only be shared with those in our community who need help, and can be deleted on your request by sending an email to [email address].

Name \*

Please enter your full name

Address \*

Please enter your full address

Four important notes:

1. Try to encourage all to fill out the form if they need help and don't have anyone to hand. Even if someone is a Helper and wants to 'Delegate', the form tracks it, but if it is done by call or email or text then it is not seen
2. Those who really struggle still have phone numbers and can call and then have the form filled for them, so it is as accessible as we can make it
3. We have a WhatsApp group which supports the Helpers (thus the tickbox), but importantly, this setup comes first
4. Set the form up to 'email me' on new submission (at the bottom of the form)

## Grid View

This is where the data where people fill out the form goes. And because it's all neatly attached the data is almost complete.

Requests								Helpers		Links & Map		SHARE		BLOCKS					
Grid view								Hide fields		Filter		Grouped by 1 field		Sort		Color		...	
A Name		A Address		A Postcode		A Area		Phone Number		WhatsApp?		Email Address		Can Help With					
AREA (Empty) Count 1																			
1	Trish Arthurs	Holcombe Lane, Newington		OX10 7AG			07907 538509		✓	theonlytrish@hotmail.com		Shopping / Food							
AREA North Count 2																			
2	Andrew Mcwalters	Plough Close, Shillingford		OX10 7EB		North	07912 771311		✓	andrewmc@hotmail.com		Shopping / Food							
3	Luke Dean	Henley Road, Overy		OX10 7JU		North	07467 394243		✓	deanol@yahoo.com		Shopping / Food							
AREA South Count 1																			
4	Fred Young	Celsea Place, Cholsey		OX10 9QW		South	01347 368222		✓	freddyyoung@hotmail.com		Urgent Supplies							
AREA East Count 3																			
5	Aleisha Thomas	Braziers Lane, Ipsden		OX10 6AN		East	01835 703597			athomas@hotmail.com		Shopping / Food							
6	Helen Veness	Gangsdow Hill, Ewelme		RG9 5SJ		East	01547 429341		✓	helen.veness@hotmail.com		Shopping / Food							
7	Yvette Chardy	Church Street, Watlington		OX49 5AB		East	01903 649460		✓	yvette@chardy.co.uk		Shopping / Food							

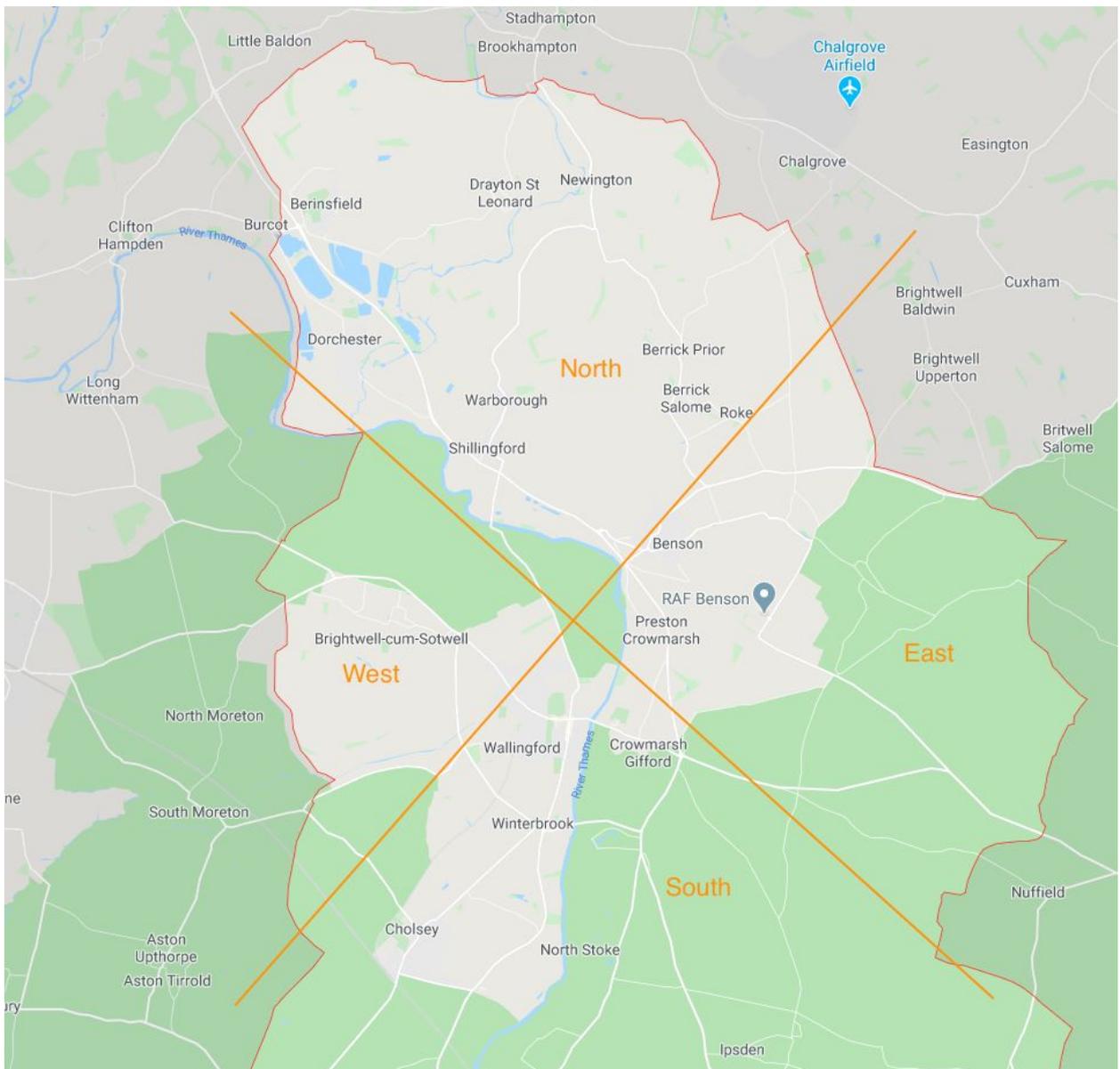
Accompanying notes on the fields:

- **Name** - we ask for the full name, it saves space to do so (rather than first/last)
- **Address** - really important so we know where they are
- **Postcode** - also important to do separately so that we can identify where they are easily and allocate an
- **Area** - the [sub-divided Area](#) they live in within the Region covered by the service
- **Phone Number** - to be able to contact them, ideally a mobile
- **WhatsApp** - if there's a Helper group, then seek permission at the same time
- **Email Address** - to send them notifications
- **Can Help With** - a multi-select for them to choose what they can help with
- **Availability** - a free-text field for them to describe their availability in the week
- **Quarantined** - a flag to identify those Helpers who are currently unavailable as they are themselves quarantined
- **Date of Signup** - automatic timestamp of when they signed up to the service
- **Requests** - when matches come in, they are also seen here, useful to track

overall delegation and even spreading

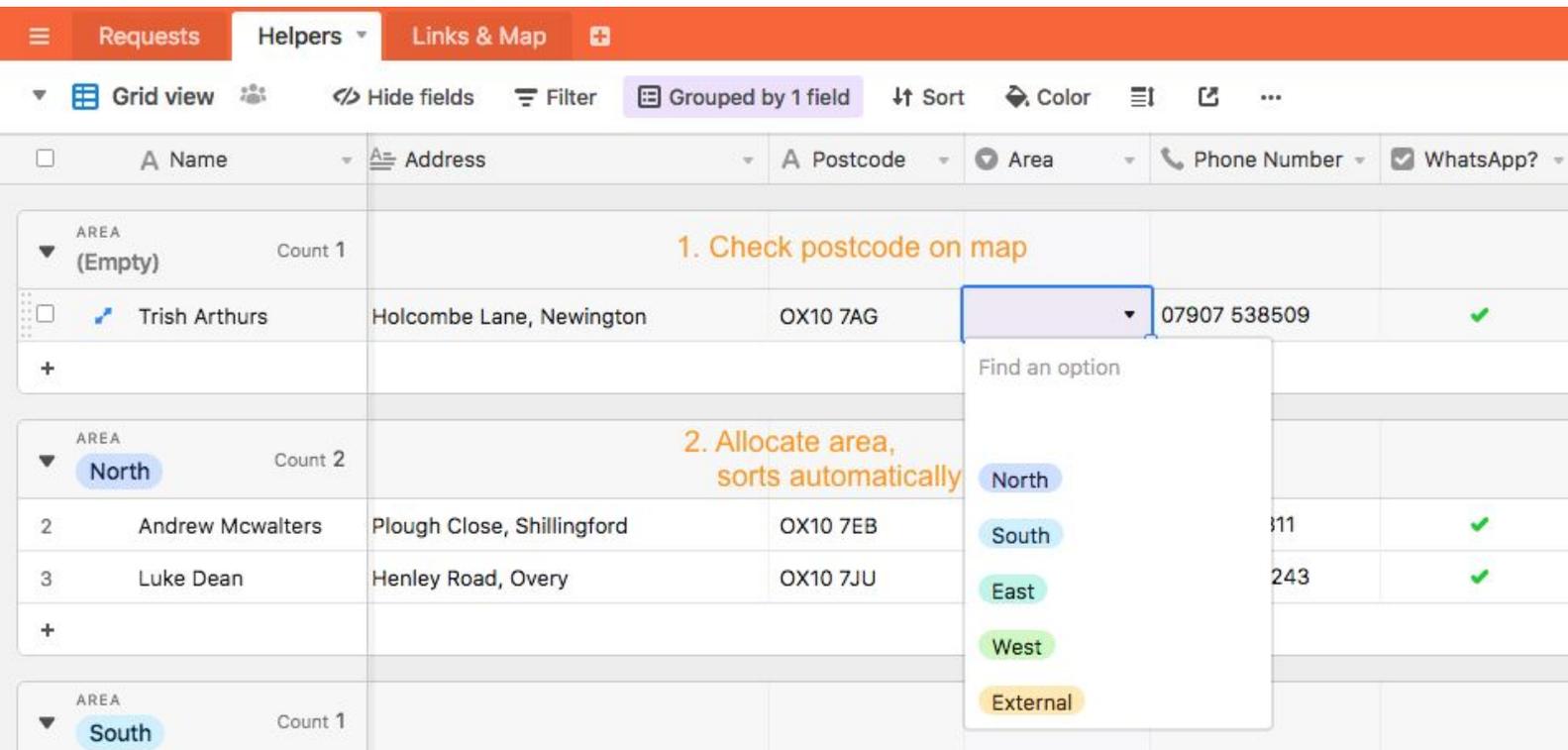
### Area Map

We recognise that most Areas are probably more than one geographical neighbourhood, and therefore strongly recommend that you break down your Region into sensible Areas, which can even be broken down further if needed. So, taking our demo Region in Oxfordshire, here is an example of what it looks like:



The purpose is to try to balance two things: firstly getting local people managing local requests: the more we can 'buddy' those geographically nearby, the more likely the pairing will be sustained ongoing. Secondly to decentralise so Areas become more self-managing.

Now we have split this Area, when the system is in operation, a new Helper comes in and we therefore need to assess the Region it is in and allocate:



	A Name	A Address	A Postcode	Area	Phone Number	WhatsApp?
AREA (Empty) Count 1	1. Check postcode on map					
<input type="checkbox"/>	Trish Arthurs	Holcombe Lane, Newington	OX10 7AG	[Dropdown]	07907 538509	<input checked="" type="checkbox"/>
AREA North Count 2	2. Allocate area, sorts automatically					
2	Andrew Mcwalters	Plough Close, Shillingford	OX10 7EB	North	11	<input checked="" type="checkbox"/>
3	Luke Dean	Henley Road, Overy	OX10 7JU	South	243	<input checked="" type="checkbox"/>
AREA South Count 1						

### What Admins Do

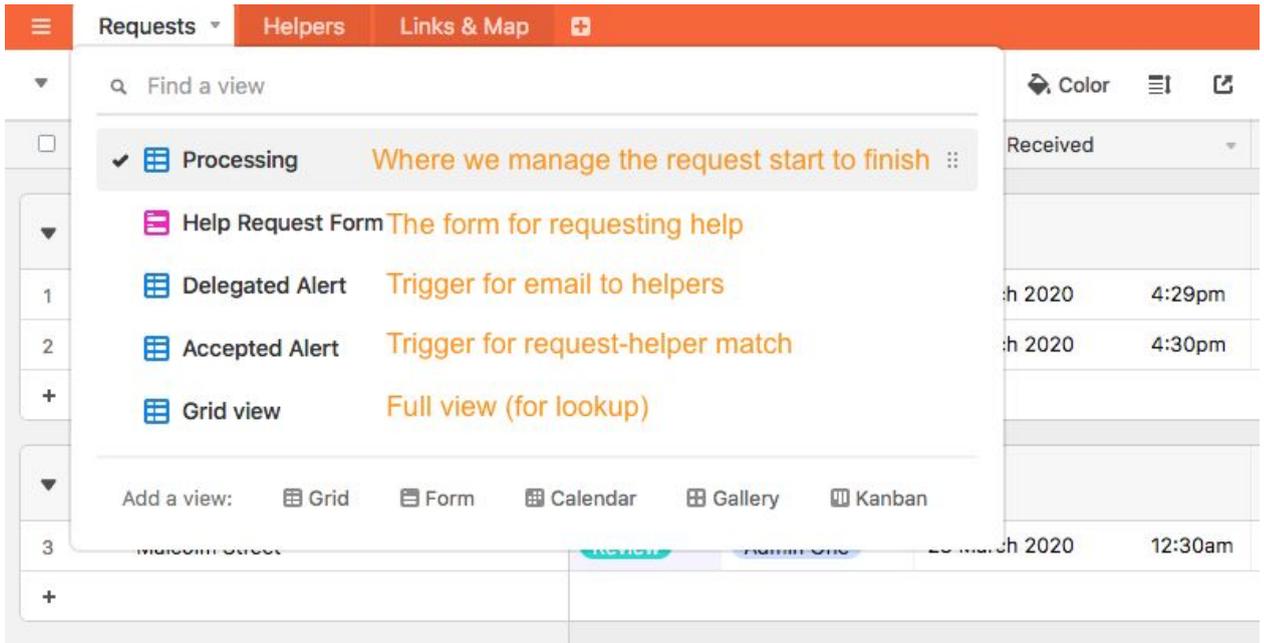
1. They get an email alert when a new Helper arrives, because of the grouping we can see the 'Empty' Area which is where the new ones appear
2. The Admin checks the postcode, in this case it is in the NORTH Area
3. They select North and job done in Airtable
4. They then in email, send a thank you email (this could be done in Zapier, but we do it manually)
5. They introduce them to the emails/contacts of the other Helpers in their Area
6. They add them to the WhatsApp group for that specific Area

Other than that the only reason to return to specific Helper details is:

- If they have changed their personal information (or there is a typo)
- If they have changed what they can help with
- If they have gone into or come out of quarantine
- If they want their personal details removed

## 6. Requests

So, now to the most important Area: when help is requested and how you respond to it. This is in the first Table (Requests). It has more Views than the Helpers Table for these reasons:



You can add more Views if you need to, but do not delete them because they all have a purpose.

### Grid View and Help Request Form

These function in the same way as the Helpers View, so we will not be covering these other than indicating that they are also configurable to a point.

### Delegated Alert and Accept Alert

These are merely there to trigger Zapier emails when a new record comes into View, so just leave them for their purpose, but it is useful to know that they are there and what the purpose is. Once you've read the Zapier walkthrough then you'll understand better why they are there!

## Processing

Requests							
Processing							
2 hidden fields							
Filter							
Grouped by 1 field							
Sort							
Color							
...							
Full Name	Stage	Handled By	Date Received		Address		Need
STAGE (Empty) Count 2							
1	Francis Thornley		22 March 2020	4:29pm	Sands Way, Benson		A Friendly Call
2	Gertrude Snow		23 March 2020	4:30pm	Wayside Green, Woodcote		Urgent Supplies
+							
STAGE Review Count 1							
3	Malcolm Street	Review	Admin One	23 March 2020	12:30am	Portcullis Drive, Wallingford	Technology Ad...
+							
STAGE Delegated Count 1							
4	Mike Smith	Delegated	Another Admin	17 March 2020	12:00am	Saxons Heath, Long Wittenham	Shopping / Food

So this is the businesses-end of the system. As you can see it looks similar to the Helpers, but has additional fields to help manage the process of qualifying and matching. It is again grouped by Stage so that we can see the new ones coming in at the top, and progressing through the stages until completion.

Here is a field list:

- **Name** - full name
- **Stage** - Empty -> Review -> Delegated -> Accepted -> Completed
- **Handled by** - the Admin overseeing that specific Request
- **Date Received** - timestamp of when it came in
- **Address** - full address
- **Need** - what they want help with
- **Details** - any specific description of their need(s)
- **Postcode** - their postcode to identify Area
- **Area** - the specific Area they are in
- **Delegated Helper** - the selected Helper best matching the Area, time and need
- **Helper name** - pulled in for the email content
- **Helper email** - pulled in for the email content
- **Helper phone number** - pulled in for the email content

The process is simple: to go through the right steps to take a request from empty to completion following a simple process in a single Airtable View. The Admins take 'ownership' of the delegation and the request, but only facilitate the introduction and supply of help. Ideally they would be either an Admin or Helper but not both.

## The Admin Process

It is useful for whoever is setting this up to understand the process they will go through which is:

### Review Stage

They are alerted by email to both the group inbox as well as their own (through Airtable) The steps are:

1. They change the **Stage** to **Review**
2. They select their **Name** as the **Handled By** person
3. They choose the **Area** for the Request by checking the postcode on a map

### Delegate Stage

The Admin handling the request will check the Helpers Table and will be trying to match on these things:

- **Location** - how near is the request to a helper? The closer the better. This is the most important match as we hope that once a helper has offered help, they may become the go-to contact for that vulnerable person
- **Availability** - will that person be available to help? Check the Helper notes and see if there is a fit
- **Need** - has that helper identified that they can help in the ways requested? If there is no match here, then it may be a good idea to put in a call or send it into the Helpers WhatsApp group. Better to have someone available to help than waiting for too long for the perfect fit

Once a match has been found, they then follow this order:

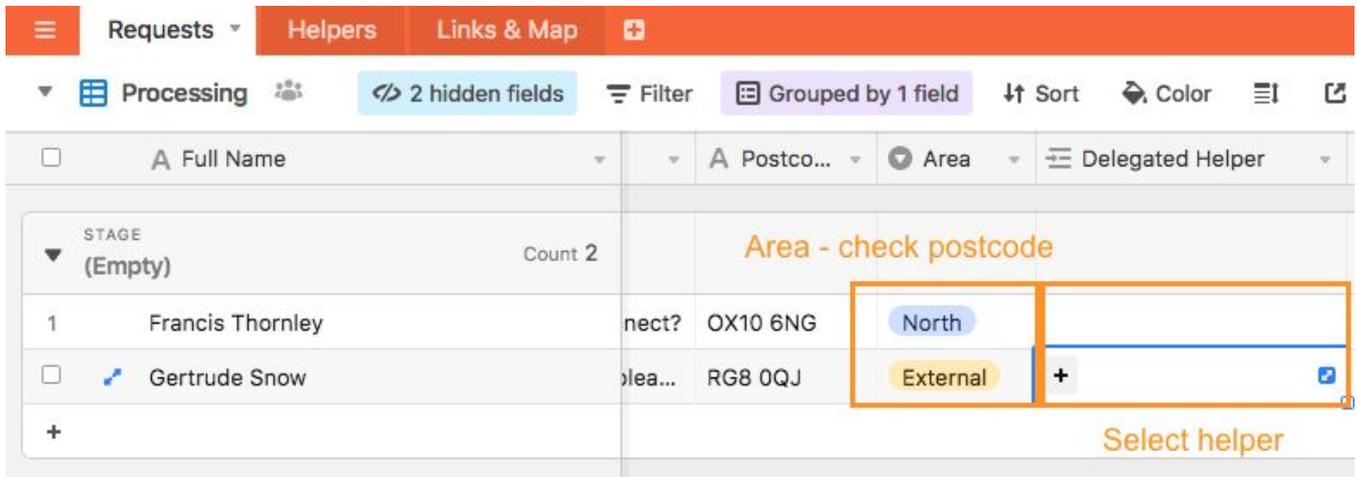
1. **Select a Helper** in the Delegated To field
2. Change the **Stage** to **Delegated**

This triggers an email through Zapier that goes to the helper automatically asking if they can help.

The Helper will be sent the email and then has a choice: to accept the delegation or to turn it down. Either reply will be by email to the Gmail box. If it is a no, then you will need to:

1. Change the **Stage** back to **Review**
2. **Select** a different **Helper** in the Delegated To field

Then repeat the process of delegating to trigger the email again to the new Helper.



### Accepted Stage

Once they have a 'yes' from a Helper they move it to the 'Accepted' stage. This means that the help has been taken up and is being actioned.

- It triggers the second email to both the Helper and the person needing help
- We know it is not finished, but in hand

We encourage all Helpers to then contact us subsequently with an email confirming that the task has been completed.

### Completed Stage

If we have not heard, the Admin as overseers will chase for an answer if they have not received one that day to ensure that it has not been forgotten.

After this, 'job done'. Thank you so much, another relieved neighbour! The line item will stay in Completed and, if the same person raises another ticket, then becomes a new line item.

## 7. Final Airtable Notes

### You can Add Other Views in Any Table

Note, you can add other Views to this, it is possible. However they are not needed for the purpose - but you can add or hide fields, sort in different ways and even have different Views... all we'd recommend is ensuring that the form and the main Table remain as they are - to avoid anything being accidentally lost.

### Avoid Pro Unless You Want to Pay

You will see these little 'stars' scattered around Airtable. They are for the Pro version and, it is really good, but is not needed. So, if you see a pro piece of functionality and want to use it, once your free trial runs out, it will be taken out. It is up to you.

You may, if your Tables get big (over 1,200 records) have to pay for this service in any case, and the cost of \$24 per user per month is relatively low, but it is worth keeping an eye on and if you find you have more than 1,200 Helpers, you could break it down into separate accounts as it's probably too many in total.

### Share New Ideas

We're all on a learning curve, and this was put together rapidly, so if you find something that you think genuinely adds value then please suggest and we can take a look and build on there. Try as far as possible to stick to the free versions of softwares so that as many communities can use it. Please [email me](#) to suggest.

### About Data and GDPR

We need to be really careful about sharing data. What you will see is for your eyes only and deliberately not visible for anyone else. If there is a data request then let [coordinators/admins] tackle the request. If someone requests removal of data then that is fine too, we just delete the line.

### In Practice

To give you an idea, the actual Area we have this operating in is managed in this way:

- 5-600 homes in the Region (our 'Parish' in council/church terms)
- Across 15 square miles
- 5 Areas being individually managed
- 100 homes per Area
- Giving an average of 8 Helpers per Area

## Zapier Setup

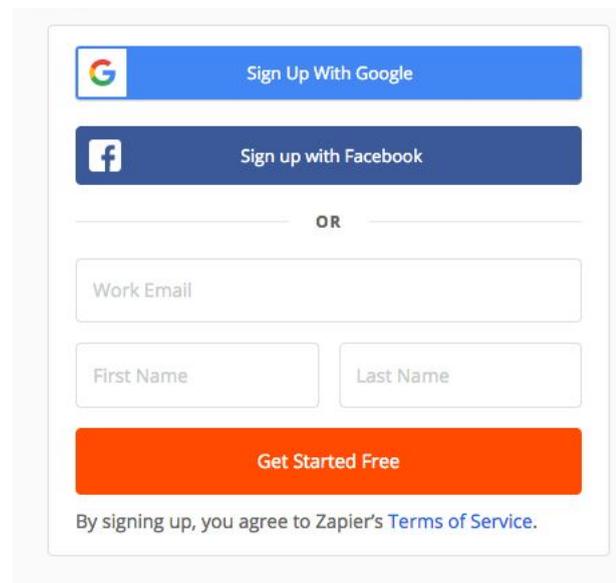
Zapier is there to run the email automations as and where required. It can do more than that, but again the purpose of this walkthrough is only to show what is needed to fulfil the service.

It also needs the most attention and testing, as it is more versatile therefore it is also easier for things to go wrong (occasionally).

Finally, we cannot send the templates to upload, so this will need to be done from scratch so there is more detail in this walkthrough.

### 1. Create an Account

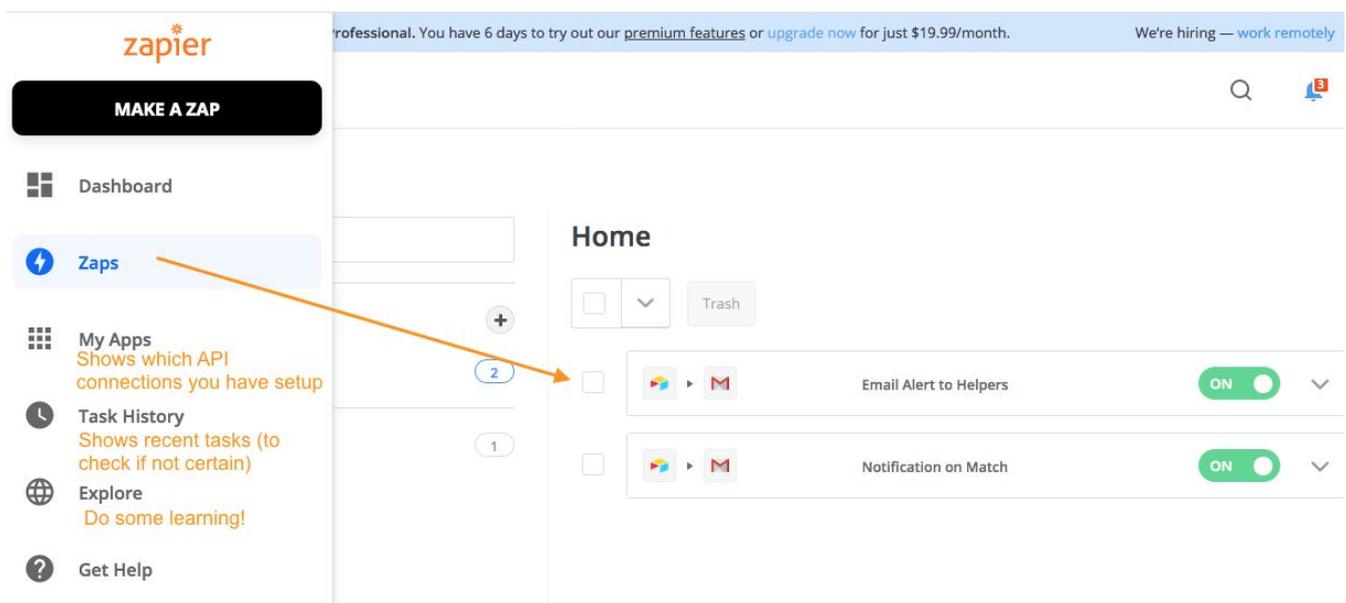
You need to 'Sign Up' with [Zapier](#), don't use the 'Sign Up with Google' button, just fill out the form as it gives you more flexibility should you decide to change email at a later date. Use the same Gmail address you have previously used.



The image shows the Zapier sign-up interface. At the top, there are two buttons: 'Sign Up With Google' (blue) and 'Sign up with Facebook' (dark blue). Below these is a separator line with 'OR' in the center. Underneath is a 'Work Email' input field, followed by 'First Name' and 'Last Name' input fields. A large orange 'Get Started Free' button is at the bottom. Below the button, it says 'By signing up, you agree to Zapier's Terms of Service.'

### 2. Understand How Zapier Works

The reason for Zapier is simply that it connects one system with an API to another with an API. We have records in **Airtable** and we want to send emails in **Gmail** without leaving Airtable - so this system allows this to happen. To trigger this kind of event is called a 'Zap'.



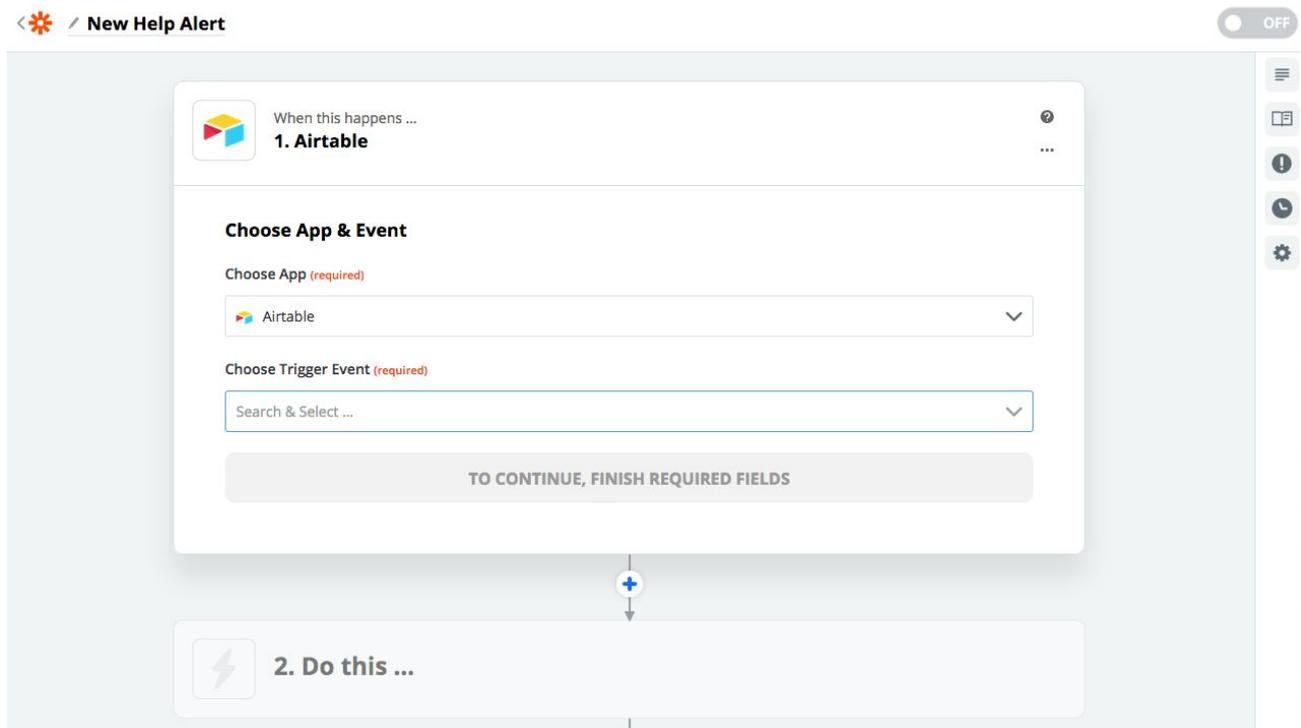
### 3. Setting up the Help Alert Email

You start by selecting 'Make a Zap' which is the black button in the slide-out menu on the left. And then you choose a name for the trigger (i.e. 'New Help Alert') and an action 'When This Happens'.

#### [Back to Airtable](#)

You will then be prompted to choose what service. We choose Airtable as that is going to be the trigger for the Zap. You will need to have the Airtable API key which can be found in Airtable under: User (the little round icon in the top right hand corner) // Account // Account Overview. Here you will have to set up an API key first and then copy and paste and return to Zapier.

#### [Back to Zapier](#)



I then choose:

- App - Airtable
- Trigger Event - New Record
- Airtable Account - Airtable
- Base - Name of Base (i.e. Coronavirus (Demo))
- Table - Requests

Once you have done this, to be sure that it is all connected correctly then you can run a test. Click 'Get Sample' if you do not see any example records and then take a look at the information displayed. Hopefully it will show you the most recent record added (personal data anonymised below) and maybe one or two other records to view. Note: fields may be in a different order, as long as the data is there, do not worry about it.

## Find Data

Here are samples from your  **Airtable** account. **Pick 1** to set up your zap. [Learn more about samples.](#)

 **Record A**  
Pulled in 2 secs ago ^

**Delegated Helper:**  
O: reckE5nMvkxvIFEpt  
**Need:** Shopping / Food  
**Area:** South  
**Phone Number:** 0700 3453452  
**Stage:** Completed  
**Email Address:** [REDACTED]  
**Full Name:** [REDACTED]  
**Postcode:** [REDACTED]  
**Details:** [REDACTED]  
**Address:** [REDACTED]  
**Handled By:** [REDACTED]  
**Date Received:** 2020-03-24T14:16:16.000Z  
**Helper Email:**  
O: [REDACTED]  
**Helper Name:**  
O: [REDACTED]

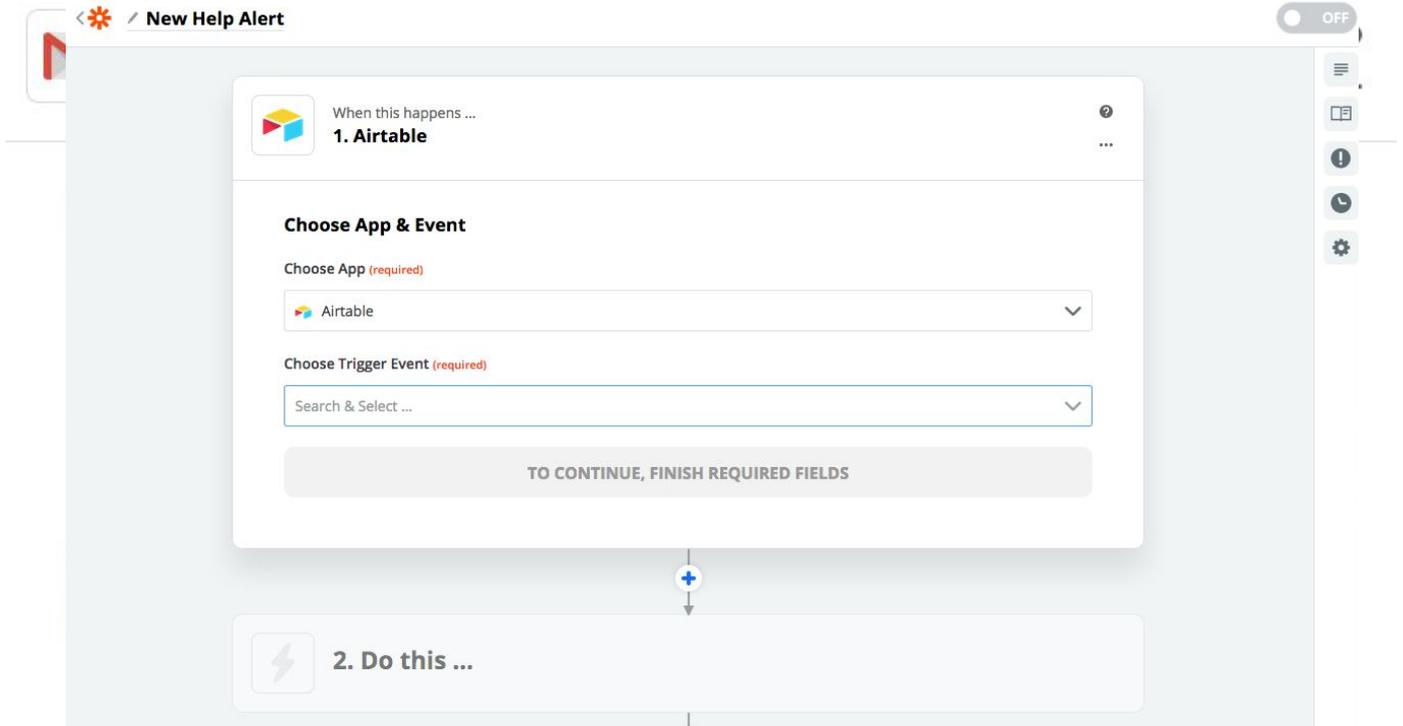
 **Record B**  
Pulled in 2 secs ago v

 **Record C**  
Pulled in 2 secs ago v

Get More Samples

All you are doing right now is just making sure the data is coming through. If you have not altered the Airtables it should, then click 'Done Editing' to move on to the 'Action' (the outcome of this trigger).

Choose 'Do This' and select Gmail. The first time you select this it will also take you through an authorisation process to ensure that you are indeed the account owner for Gmail, but you only need to do this once.



The event is to send an email, click 'Continue' as above. I then choose the Account as the Gmail account I have attached to this. Then Customise Email. For this email, as it is an Alert to Admins, it needs to be setup in this way:

- **To:** comma separate the Admin email addresses (if you add a new Admin, then they will need to be put into Zapier)
- **Cc:** we add in the admin email account for testing purposes, but then remove as the form is triggering too
- **From:** has to be from the admin email account
- **From Name:** give it the name of your community account
- **Reply to:** should be the same admin email account unless you want to field replies elsewhere
- **Subject:** an obvious one for the email i.e. 'ALERT: New Help Request'
- **Body Type:** keep it simple, Plain!
- **Body:** the content for the email in this instance we want to get people going directly to the Airtable, so we just put:  
Someone has just requested help, please go to your Airtable to action:  
[Link to Airtable Base]
- **Label:** important, because it is!

Then you can send a Test which will send the last sample data to the distribution list to ensure that it is firing as it should do. If it is, switch it 'On'.

## 4. Setting up the Email Request to Helpers

The purpose of this email is to notify a potential Helper that we would like them to act on a Request.

The process you go through is very similar to the above, you start off by setting up a Zap. Then you do these things (I have highlighted where DIFFERENT to the first alert):

### When This Happens - New Record in View in Airtable

- App - Airtable
- Trigger Event - New Record View
- Airtable Account - Airtable
- Base - Name of Base (i.e. Coronavirus (Demo))
- Table - Requests
- View - Delegated Only
- Get Sample and Test (view) Data

### Do This - Send Email in Gmail

- **Choose App:** Gmail
- **Choose Event:** Send Email
- **Choose Account:** Your Gmail Account
- **To:** [Helper Email] (pick from the Zapier 'Type a Value' dropdown)
- **Cc:** we add in the admin email account
- **From:** has to be from the admin email account
- **From Name:** give it the name of your community account
- **Reply to:** should be the same admin email account unless you want to field replies elsewhere
- **Subject:** an obvious one for the email i.e. 'URGENT Help Request'
- **Body Type:** keep it simple, Plain!
- **Body:** the content for the email which needs quite a bit of customising (see below)
- **Label:** we created two Labels - one for Helpers and one for Requests, if you want to you can add a Label here which will flag it when it arrives in Gmail to make life a little easier
- Get Sample view of email with data in it and Test and Review

## Email Template

This is the email copy we use for this alert, but you are welcome to amend it:

Hi [Helper Name]

We have just received this urgent request:

[Name of Person]

[Phone Number]

[Email Address]

[Address]

Who needs:

[Type of Need]

[Details of Need]

Can you please let us know you will be contacting [Name of Person] to help? If you're not able to, then can you please let us know as soon as possible, and we will find someone else.

Once you've helped, please let us know that this has been completed and we can close that request. We then know the task has been done. Thank you so much for volunteering at this time.

Kind regards

[Coordination Team Name]

[Coordination Email Account]

P.S. Be as careful as possible in terms of assisting. Please try to wear gloves when giving assistance or even shopping, and also be careful with change, money and receipts. Keep your distance, when you drop off shopping or other items.

## Adding the 'Keyword Replace' fields

For the highlighted items in the email, you need to replace the names with the actual data in the fields to ensure that for every new record, the replacement.

2. Send Email

Plain

If using the HTML option, you must add any and all formatting (paragraphs, lists, etc) directly using HTML. [Learn more.](#)

Body (Required)

Hi 1. Helper Name: [REDACTED]

We have just received this urgent request:

1. Full Name: [REDACTED]  
1. Phone Number: [REDACTED]  
1. Email Address: [REDACTED]  
1. Address: [REDACTED]

Who needs:

1. Need: Shopping / Food  
1. Details: Tomato sauce, p...ta, and cheese.

Can you please let us know you will be contacting 1. Full Name: [REDACTED] to help? If you're not able to, then can you please let us know as soon as possible, and we will find someone else.

Once you've helped, please let us know that this has been completed and we can close that request. We then know the task has been done. Thank you so much for volunteering at this time.

Kind regards

The Sulhelpers Team

P.S. Be as careful as possible in terms of assisting. Please try to wear gloves when giving assistance or even shopping, and also be careful with change, money and receipts. Keep your distance, when you drop off shopping or other items.

Insert Data ...

Search...

1. New Record in View in Airtable

1. Record id recF5zBblmMu9Qk0t

1. Email Address [REDACTED]

1. Full Name [REDACTED]

Show All Options

Send Data (skipped)

Zap is ready - now turn it on! OFF

Send us an Email!

Watch Zapier and make sure when you leave it the Zaps are switched on (as Zapier turns them off whilst you are editing)

AND ... Make Sure Your Zaps are On When you Go Live

## 5. Notification on Match

The purpose of this email is to notify both the Helper and the person requesting help that they have been matched. So the process is even closer to what you have just done for the Help Request email.

Do these things (I have highlighted where DIFFERENT to the second alert):

### When This Happens - New Record in View in Airtable

- App - Airtable
- Trigger Event - New Record View
- Airtable Account - Airtable
- Base - Name of Base (i.e. Coronavirus (Demo))
- Table - Requests
- View - Accepted Only
- Get Sample and Test (view) Data

### Do This - Send Email in Gmail

- **Choose App:** Gmail
- **Choose Event:** Send Email
- **Choose Account:** Your Gmail Account
- **To:** [Helper Email],[Email Address] (pick from the Zapier 'Type a Value' dropdown, make sure comma delimited)
- **Cc:** we add in the admin email account
- **From:** has to be from the admin email account
- **From Name:** give it the name of your community account
- **Reply to:** should be the same admin email account unless you want to field replies elsewhere
- **Subject:** an obvious one for the email i.e. 'HELP Match - [Area] Helpers'
- **Body Type:** keep it simple, Plain!
- **Body:** the content for the email which needs quite a bit of customising (see below)
- **Label:** we created two Labels - one for Helpers and one for Requests, if you want to you can add a Label here which will flag it when it arrives in Gmail to make life a little easier
- Get Sample view of email with data in it and Test and Review

### Email Template

This is the email copy we use for this alert, to keep it short and sweet, but you are welcome to amend it:

Hi [Name of Person]

Help is on the way. We have matched you with [Helper Name] who will be in touch with soon to arrange.

Please allow them a little time to get in touch, but for your information their contact details are:

[Helper Phone Number] or  
[Helper Email Address]

Thank you for reaching out to us.

Kind regards

[Coordination Team Name]  
[Coordination Email Account]

P.S. We will exercise as much caution as we can in helping you. We will wear gloves when giving assistance or shopping, and handling change, money and receipts. And we will probably leave things on doorsteps at an agreed time so that we maintain a safe distance. Please talk through payment and other practicalities with [Helper Name] when you connect.

## 6. About Zapier

We are using the 'free' version of Zapier, which gives 1,000 Zaps a month, and if you use more than that, you will need to upgrade to the paid version, so think wisely about

## Order of Roll Out

### 1. Testing & Clear Out

Firstly you need to think about customising the three Tables to suit your preferences, the variables that you need to change are:

- **Areas** - to split up your region into manageable areas. In the example we have North, South, East, West and External; but you might have specific named neighbourhoods and towns. Ideally have min 50 homes and max 500 per Area, and make sure the areas names on both sides match
- **Handled By** - needs to be a list of the overseeing Admins for the community so that they can oversee, could be as few as one, and as many as are able to manage and delegate help requests
- **Need** - again these need to match the needs in the Helper Table. You may add to this noting that there is an 'Other' option for more unusual requests.

Note: if you do delete or change the fields, make sure that they are accounted for when it comes to the integration with Zapier in particular.

Then use the dummy data to setup Zapier, and then try adding new records on both sides, checking in particular:

- The forms import to Airtable
- The Zapier triggers work
- The Gmail account works and receives form fills
- Then delete it all and get ready to launch (note any deletions are stored in the Trash and can be restored)

### 2. Recruit Helpers First

So, now you need the Helpers, we setup a shorter link for the form and circulated this in:

- The local Facebook group
- WhatsApp
- Word of mouth

The idea being that we cannot offer help if there are no helpers. We managed to recruit about 25 helpers in a few days.

### 3. Broadcast

We then moved on to broadcasting, still looking for more Helpers but also promoting the help requests, in these ways:

- More on the local Facebook group
- Leaflet drop (all houses, run by the Area Helper groups)
- Local parish magazine
- Word of mouth

This doubled the number of helpers and started the flow of help requests. We will continue to broadcast and increase awareness. Now that people know there are almost 50 helpers available at short notice, we're on the way.

### 4. Review and Optimise

We continue to review, optimise and adjust as we see fit to make it work as effectively as possible, which is why we continue to invite feedback and suggestions.

We hope that you will use it too and ideally with a decentralised approach we can allow other communities to take advantage of the softwares available.

### 5. Other Ways to Connect

Other things we are doing (or considering):

1. A regular community video call (once a week) to connect to others, more of a free-form drop in than structured so that all can join
2. Thinking about doing something similar for kids too (and possibly mums of younger kids)
3. Separate WhatsApp groups for the local groups

## About the Author

My name is John Braithwaite, I run a Digital Agency called [Ergo Digital](#) near Reading, England. I have a family of six, and I care about my community (where we are using this system).

I use these softwares for work and, on witnessing the challenges with coordination, I believed that we could quickly put together a system that would work effectively quickly for the growth in need which is undoubtedly coming.

I will be adding resources to a special section of our website as we add videos and other support to help people get started.

The whole idea is to decentralise to allow it to grow - so you do not need my authorisation: if you want to use it, use it please go ahead! If you want to share it - do!

If you get stuck, then [let's connect](#), but please try to fix it yourself if you can.