To protect the identity of the company-owner of this file

- All screenshots have been intentionally blurred.
- All links have been removed or substituted.

Document Purpose

To describe the entire integration, how it works and to provide useful links/resources.

Overview

We have a lead generation form on the website that consists of 2 steps:

- Step 1: https://www.alexshvchnko.com/giveaway
- Step 2: https://www.alexshvchnko.com/giveaway/step-two

Those are 2 separate form submissions even though we make it look like it is one process and one 2-step form submission.

The form submissions are usually stored within the DUDA web platform.

This integration allows us to export form submissions to Google Sheets files and Airtable.

This in turn makes data processing easier for the team.

See detailed overview of this integration below.

How it works (demo)

See video overview 🔗 here.

High-level integration flow:

1. Step 1 form 🔗 is submitted by website user
2. New record is added to Step 1 Google Sheets file 🔗 and Airtable base 🔗 (Website Forms Submissions Data table)
3. Step 2 form 🔗 is submitted by website user
4. New record is added to Step 2 Google Sheets file 🔗 and old record is updated in the Airtable base 🔗 (Website Forms Submissions Data table).
5. New record with the info from 2 steps is created in the Airtable base 🔗 (Website Leads table).

You can see a detailed process map of the integration here 🔗.

Behind-the-scenes

See video overview here 🔗.
Here is how the integration works behind the scenes:

1. Website forms are connected to Google Sheets files.
   Every time website user submits the form, a new row with the responses is added to the Google Sheets files.
2. Google Sheets files are connected to Airtable through Airtable native integration.
   Every time new row is added to Google Sheets, Airtable receives that information and processes through active Automations (more on the Airtable automations in the sections below).
3. Airtable processes the responses using logic build into automations.
   Each record triggers a specific automation that matches the submissions and exports the final results to another Airtable table that is used by Operations.

More on every step below.

Step 1. Connect Forms to Google Sheets.

Website forms

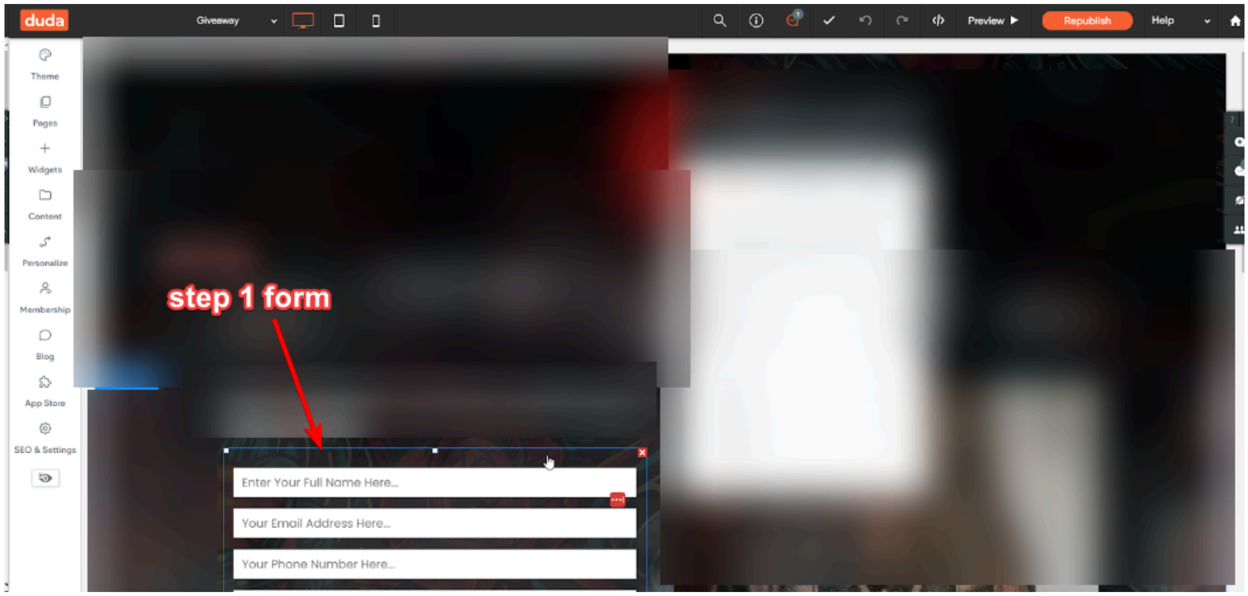
As mentioned above, we have 2 website forms:

Form Name	Form URL	Form URL in editor	Google Sheets File
Step 1 Form	https://www.alexshvchnko.com/giveaway	https://my.duda.co/home/site/alexshvchnko/giveaway	Access 🔗
Step 2 Form	https://www.alexshvchnko.com/giveaway/step-two	https://my.duda.co/home/site/alexshvchnko/giveaway/step-two	Access 🔗

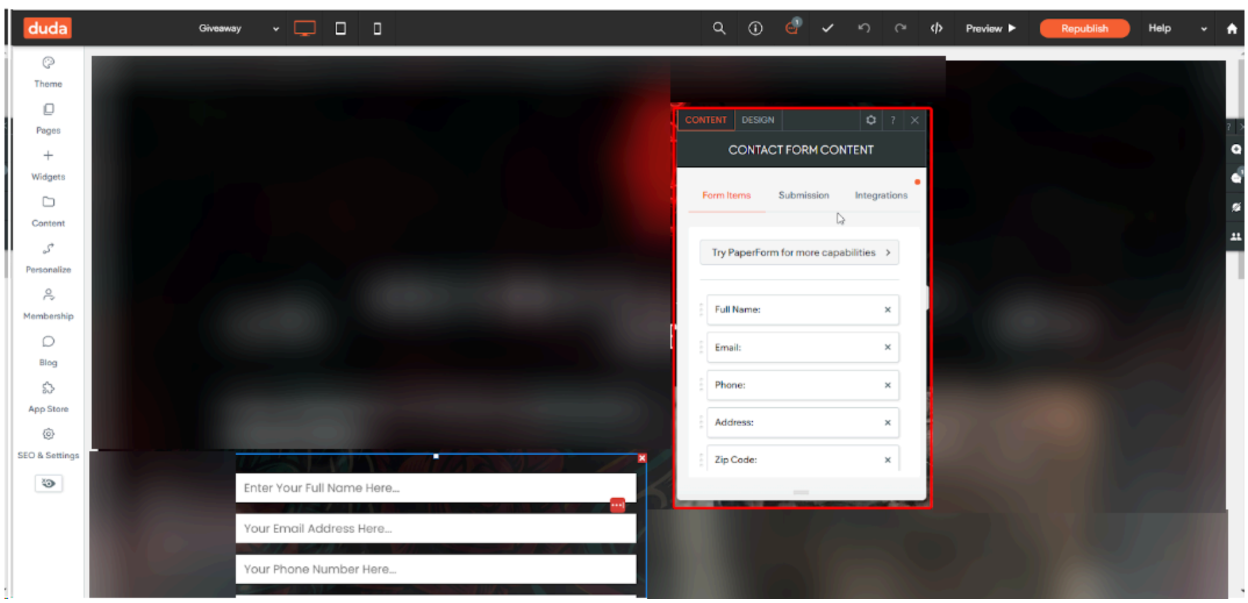
We use DUDA website builder. Hence, editing, connecting, styling forms are done through DUDA.

How to

If you navigate to Step 1 Form in the DUDA editor, this is what you are supposed to see:



If you click on that form, the form settings pop-up:



The only section we are interested in this form settings section is the Integration tab.
In the integration tab is where we can connect the form to a specific Google Sheets file.

Note, the Google Sheets must be empty and containing 1 Sheet only.

- *If you are trying to use a pre-filled Google Sheets file, the DUDA builder will simply overwrite it.*
- *If your Google Sheets file contains more than one Sheets, the integration will simply not work.*

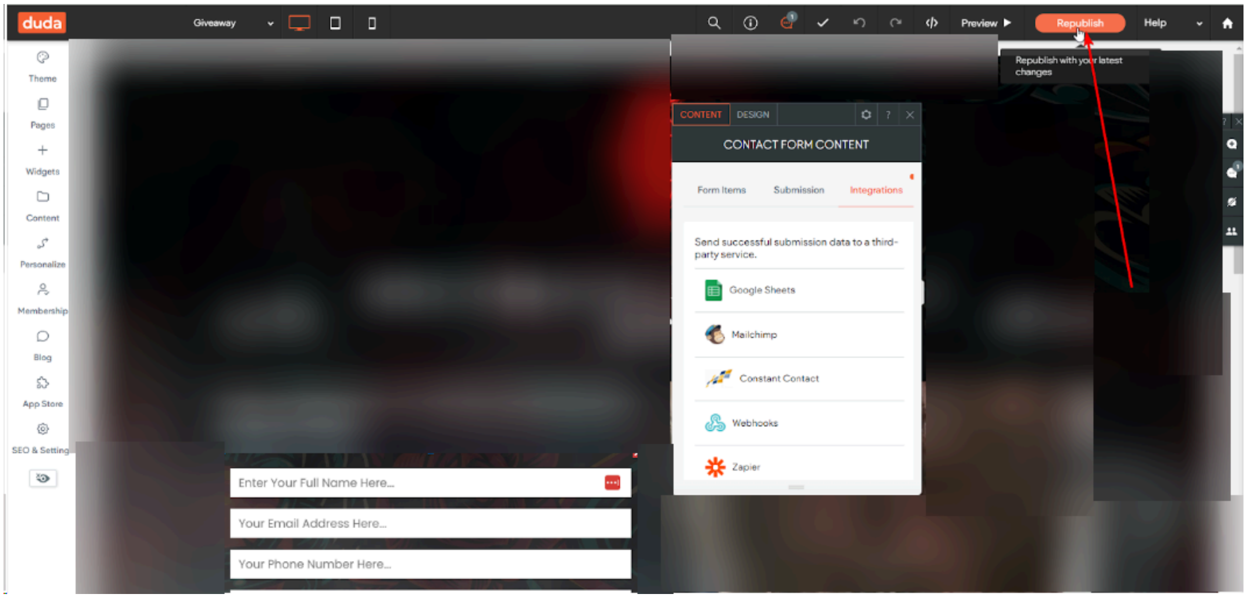
This is the reason we use 2 Google Sheets files (one per form).

When you click on Google Sheets option, it will simply ask you to connect to the correct Google Account and select the spreadsheet you would like to use. Just follow DUDA instruction to complete the integration.

As soon as you completed the connection to a specific Google Sheets, **republish the website**

Note, integration won't work if you missed republishing the website.

To republish the website, simply click the button *Republish* at the top right corner of your screen.



If for some reason you do not have the *republish* button, please, contact administrator. That means that you do not have the publishing permissions.

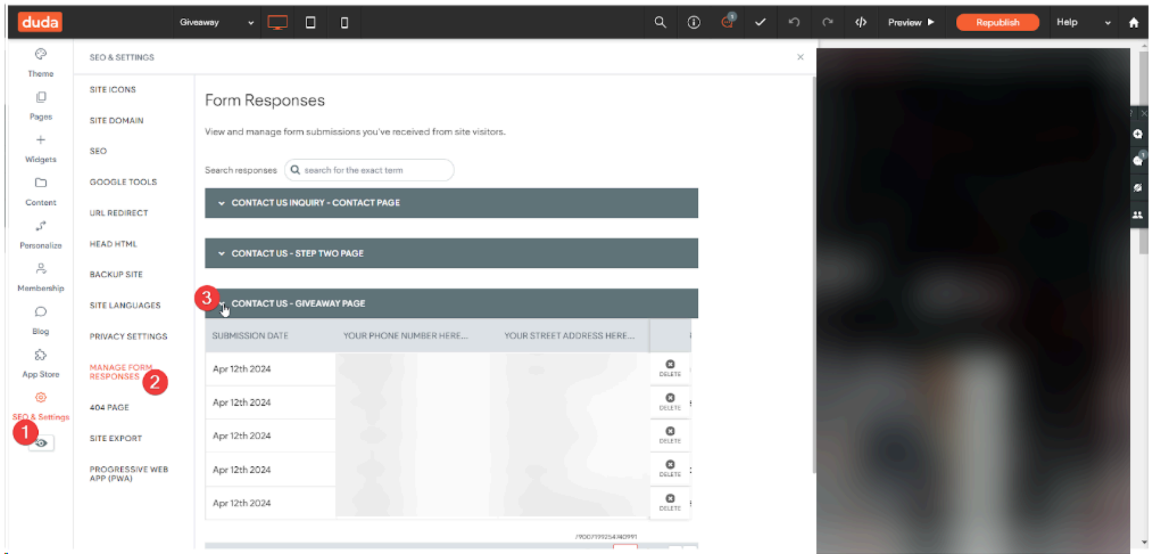
Repeat the same process for the Step 2 Form.
When you are done, the first step of this integration is completed.

How to find submissions in DUDA builder

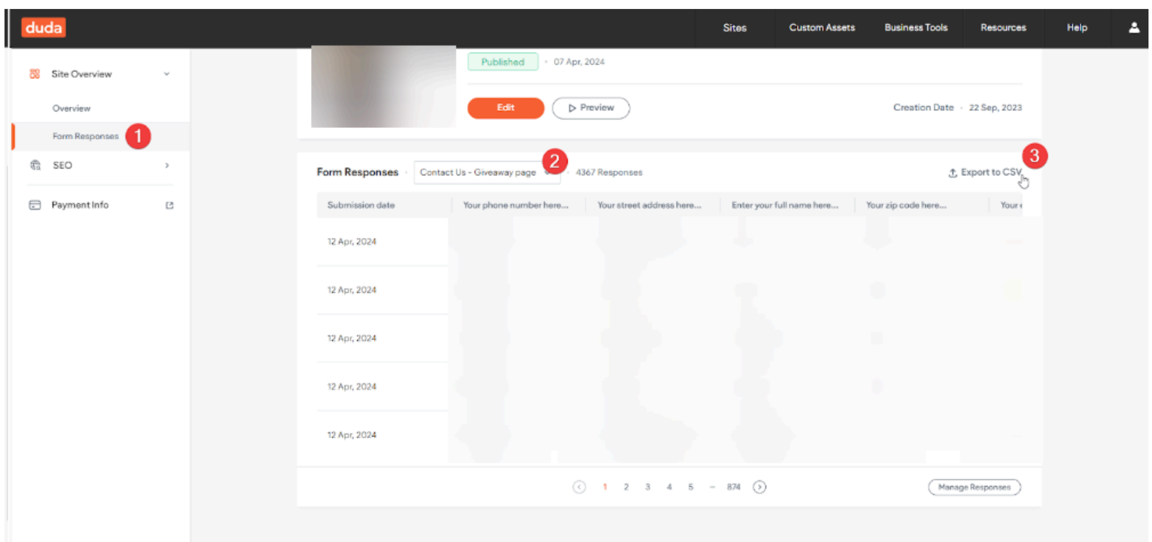
In case you are trying to find form submissions within the DUDA platform, there are 2 options to locate them:

1. View-only option
   Without exiting the page, click on *SEO & Settings,* then navigate to *Manage Form*

Responses and review the available form submissions.



2. Export option
   This option allows you to export form submissions.
   Simply navigate [here](), select the right form you would like to view, and use *Export to CSV* button to export records.



Step 2. Merge Google Sheets files. (optional)

If you want to create a Google Sheets file that contains all the responses (Step 1 and Step 2 form submissions), then follow the instructions from this step. Otherwise, skip to Step 3 of this document.

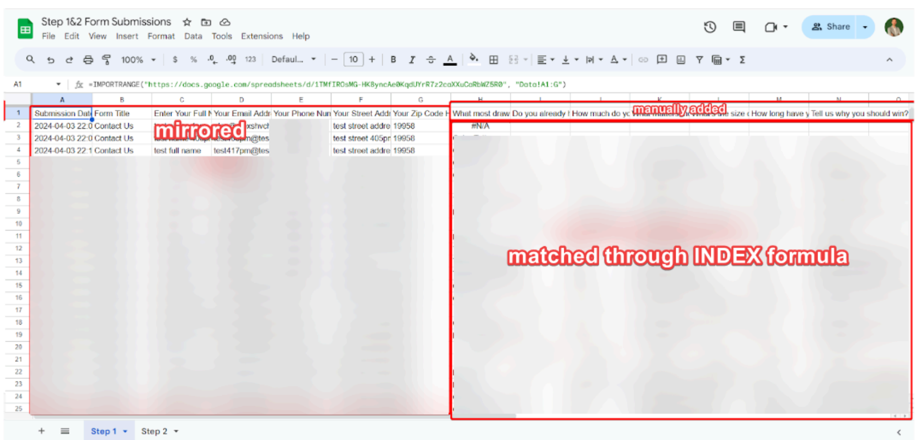
As you remember from the Step 1 of this document, we cannot utilize the existing Google Sheets files to create a Master File that contains all the responses (both forms). If you are not sure why, read the notes from the *How to section* once more.

Hence, we need to create one more Google Sheets file that is going to be used to merge the responses.
This is the file that has been created. 🔗

This file contains two sheets:

Sheet name	**Description**	**Formula used**	**What formula does**
Step 2	This sheet is used to mirror (import) information from the Step 2 Form Submissions File. We import the data to be able to use it for matching/merging purposes.	=IMPORTRANGE("https://docs.google.com/spreadsheets/d/alexshvchnko","Sheet1!A:K")	Formula imports data from the specified sheet and the specified range. Think of it as a mirror, rather than import as the data is auto-updated whenever the changes are made to the source file.
Step 1	This sheet is used to mirror (import) information from the Step 1 Form Submissions File as well as match and merge data from Step 2 Sheet of the same file.	=IMPORTRANGE("https://docs.google.com/spreadsheets/d/alexshvchnko","Sheet1!A:G") =INDEX('Step 2'!A1:$J,MATCH(D2,'Step 2'!$C:$C,FALSE),4)	Same formula to import data from another Google Sheets file. INDEX formula searches for corresponding records on another sheet (Step 2) and the matching info. This works similarly to VLOOKUP formula but it is more flexible. Make sure to apply INDEX formula to all required columns and rows.

Note, sheets in the table above are intentionally listed in the reverse order (first Step 2, then Step 1). That's because you cannot complete the setup of Step 1 sheet without setting up the Step 2 first.



Step 3. Connect Google Sheets to Airtable.

Base and tables

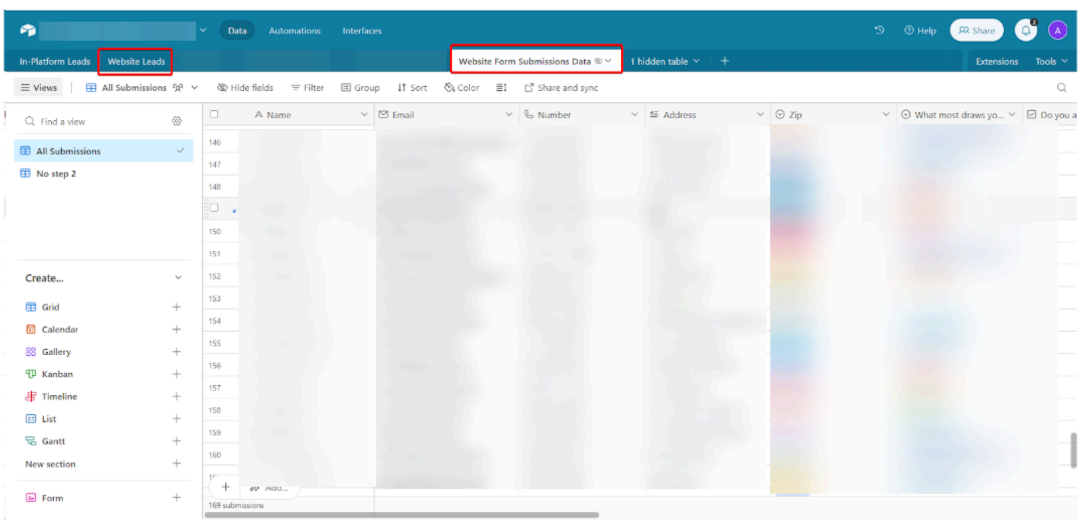
Airtable has a similar functionality to the one described in the Step 2 for Google Sheets.
The only difference is that it has more logic built in as Airtable is used by Operations to actually process the responses. Let's dive into it in this section.

This is the Airtable base that is used to receive data from Google Sheets. 🔗
These are the tables that participate in this integration:

Table name	Table role	Active automations

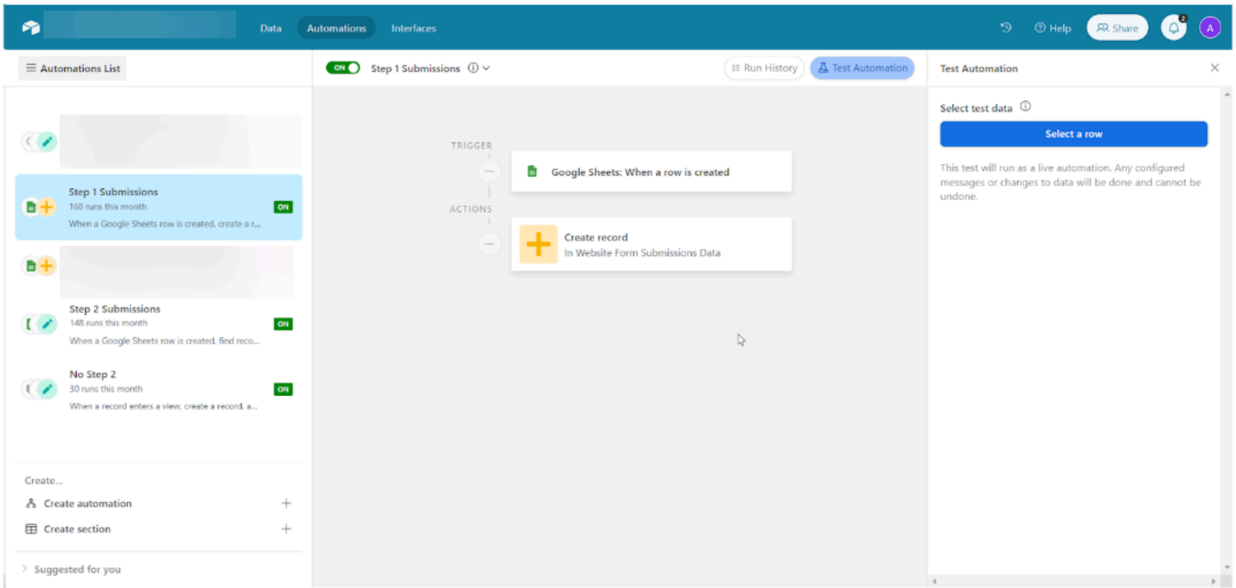
Website Form Submissions Data	To receive all form responses and match them.	1. Receive Step 1 Form Submissions.
		2. Receive and match Step 2 Form Submissions.
		  a. Receive and Match
		  b. Create a new record on Website Leads table
		3. Create a new record on Website Leads table for the incomplete submissions.

Website Leads	Used by Operations to process completed form responses.	Related to integration - none.



Automations

Automation #1. Receive Step 1 Records

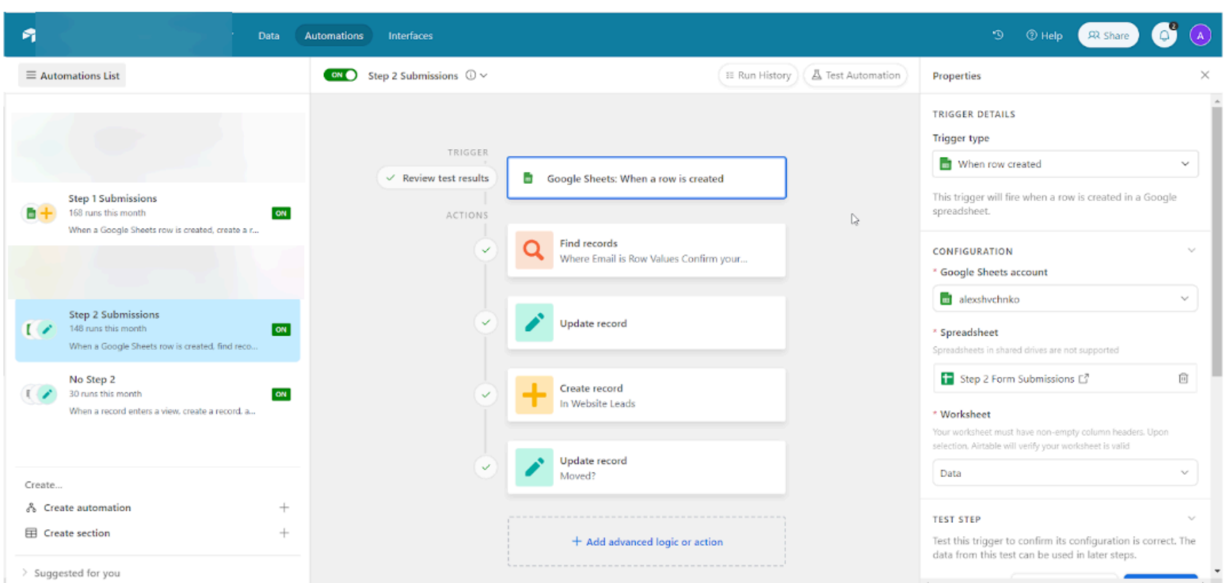


Here is an overview of how this automation works:

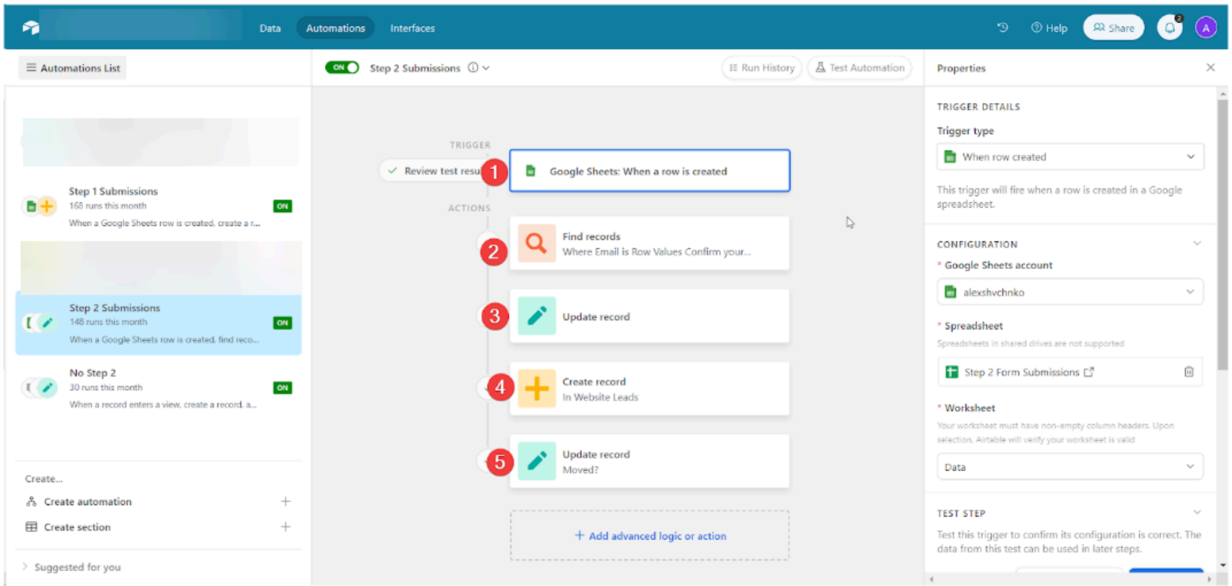
1. When new row is added to Step 1 Form Responses Google Sheet file
2. Create a new record in the Website Form Submissions Data table.

As simple as that.

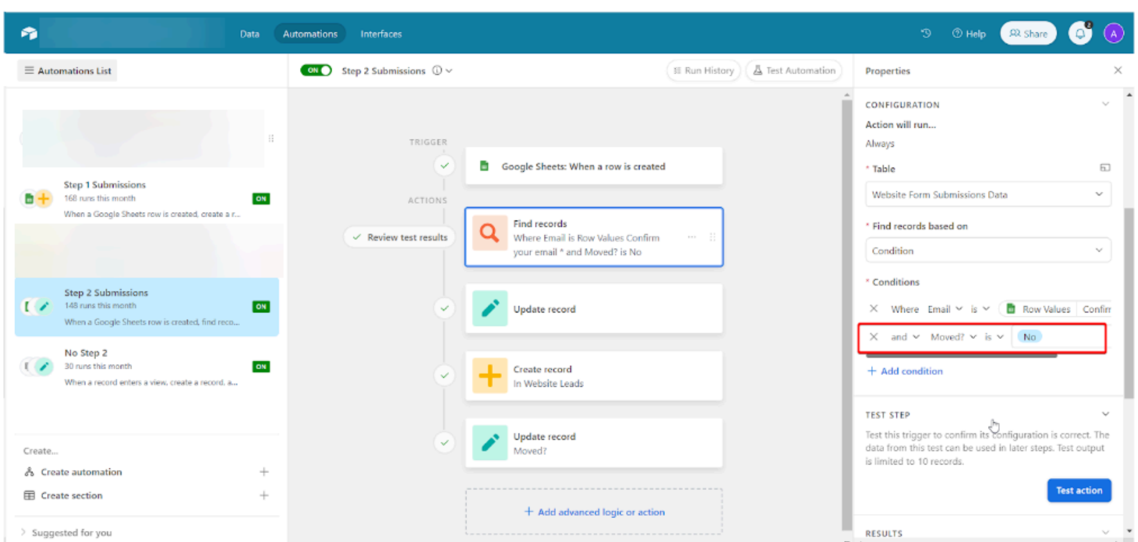
Automation #2. Receive and process Step 2 Submissions.



As you can see this automation is more complex. Let's break it down into individual steps.



1. Connection to Google Sheets.
   It is just a trigger: when new row is added to Step 2 Form Submissions.
   There is no action performed so far on this step. Airtable simply receives information and goes to the next step in the automation to process it.
2. Find matching records using email field.
   This is the step where Airtable uses email provided to search for matches in the existing airtable data (added using Automation #1). If match is found, then the automation goes to the next step. If match is not found, then the automation throws the error message (send an email notification).
   We added a condition to this step as well.



The condition *Moved* specifies if the record has been previously moved to Website Leads table. This helps us solve multiple automation issues:

a. If user submits both forms multiple times - we won't have any automation errors (not good actually but does not happen often)

   b. If user submits the second step form multiple times, only the first submission goes through (good thing, happens often)
3. Update matching records.
   If automation found records, then it will be updated with the new incoming data.
4. Create a record on Website Leads table.
   Now that we have both responses (from Step 1 and Step 2 forms) we can go and create a record on Website Leads table.
5. Mark this record as moved to the Website Leads table.

You might have a question *what do we do with the records when the user submitted the step 1 form but missed submitting the step 2 form.*

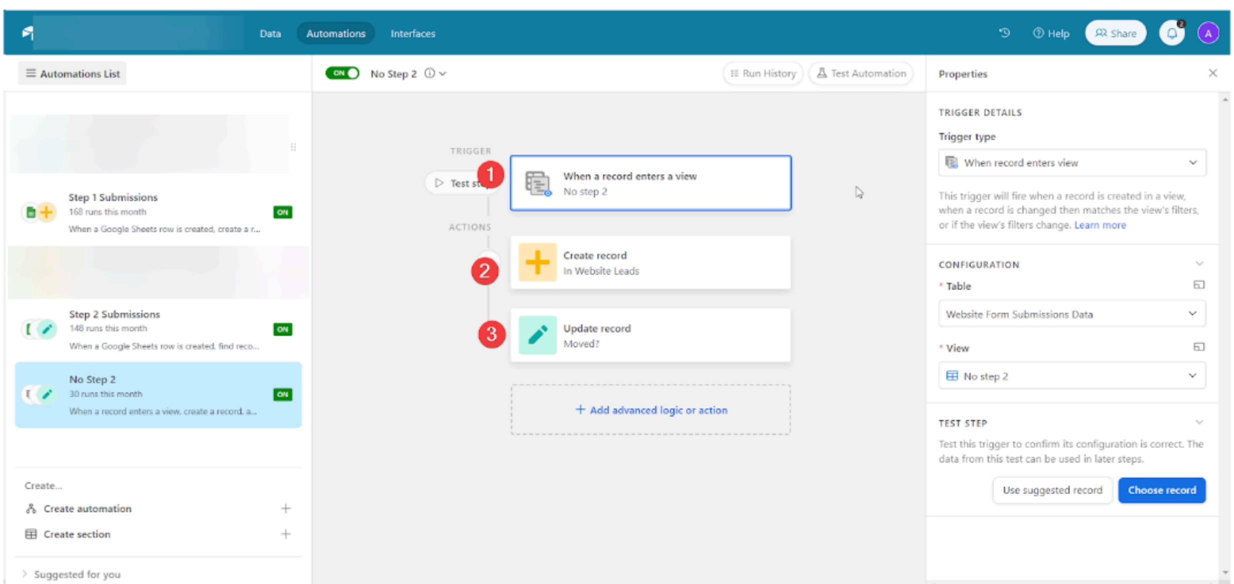
This is why we have the next automation.

Automation #3. Create records for missing step 2 forms.

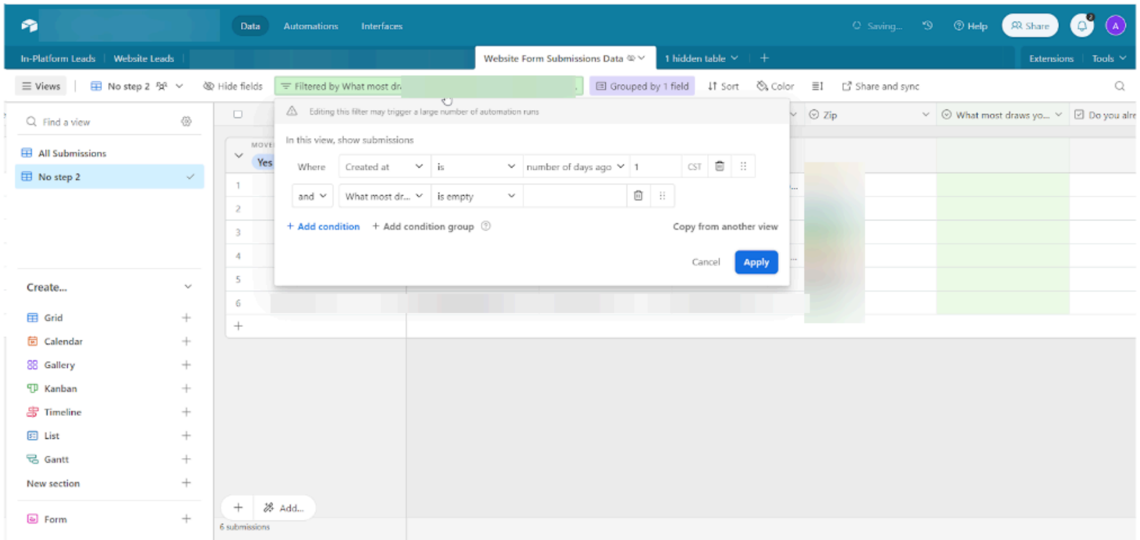
So let's imagine a website user who submitted the Step 1 form and then got distracted by something else. He never returns to submit the Step 2 form. That contact might still be valuable so it is important for us to pass this information to operations anyways.

A good practice though is to give our website users some time. Could be he/she got distracted and will return in 2-3 hrs to complete the Step 2 form.

For this reason, we created a 24 hr delay **before** sending this record to Website Leads table. Here is how this automation works:



1. When record enters a view.
   You can use multiple options as a trigger here. I went with the view option.
   This is the table view I use to trigger automation.



Basically, it says: *when the record is at least 24 hrs old and any of the Step 2 form fields are empty (no step 2 form submitted), then we want to run this record through an automation.*

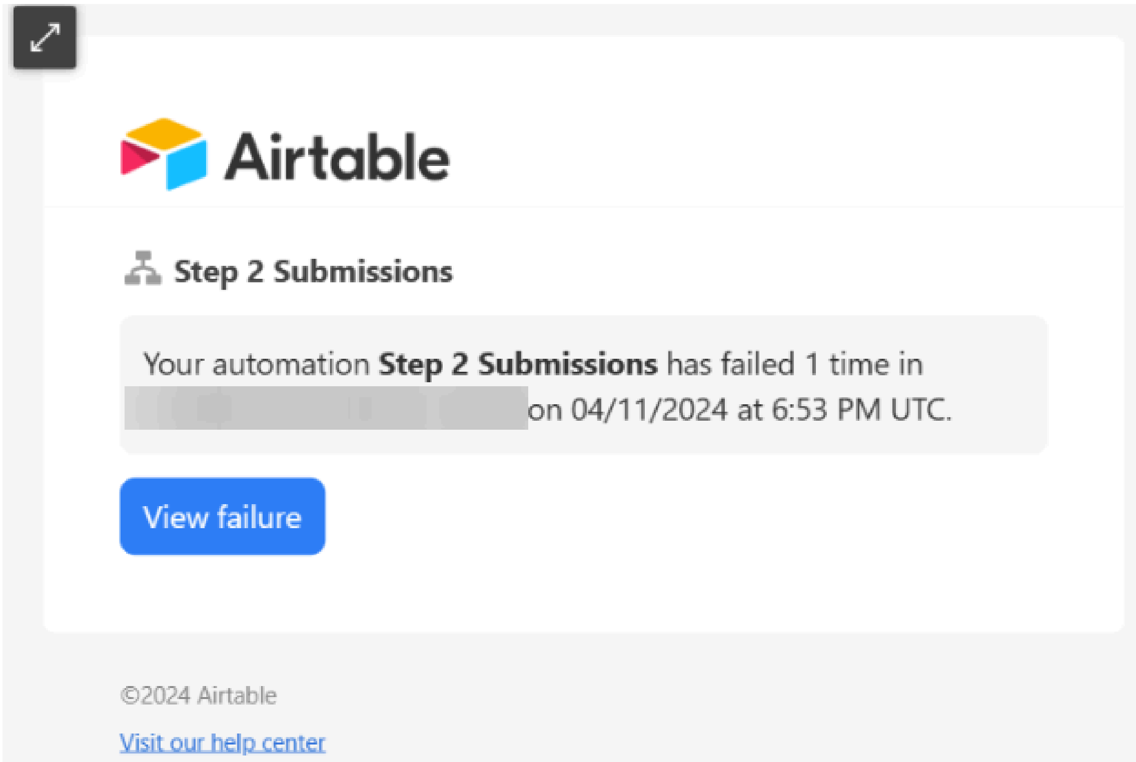
2. Create a record on the Website Leads table.
   Now that we know that website used never submitted the Step 2 form - we can go and safely pass the info to Operations for processing.
3. Change Moved to Yes.
   This is just to specify that eventually we did move (create) the record on the Website Leads table.

This is how the entire integration between https://www.alexshvchnko.com/, Google Sheets and Airtable works.

Troubleshooting

Error #1.

I receive automation errors to my email address. What does it mean?



This ^ is how a standard error message looks like.
Click on *View failure* to review what went wrong. Usually, it shows that the failure is in the Update Record step.

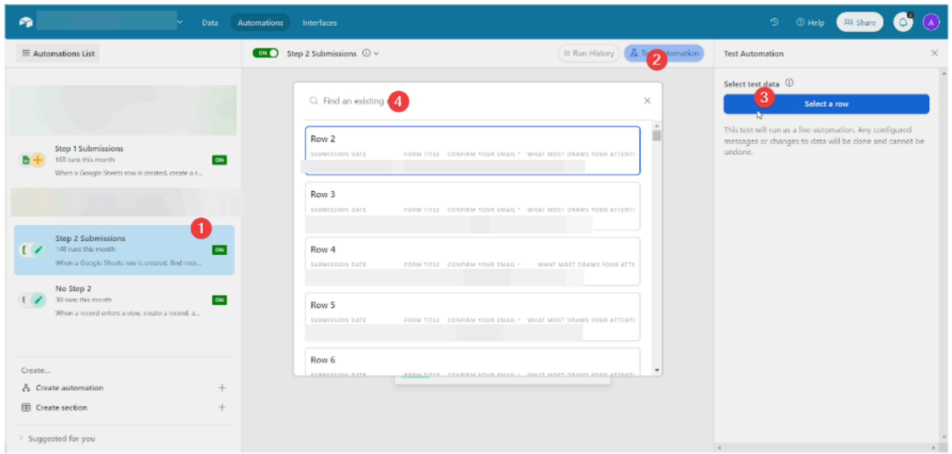
But in reality the actual issue is with the Find Record step. This is because even if no record is found, the Airtable will still go and try to complete the next step in the automation (which is Update record in our case).

As there was no record found, hence, there is nothing to update and this is when Airtable throws an error.

So search for the issue in the Find Record step.
There are multiple issues that can happen:

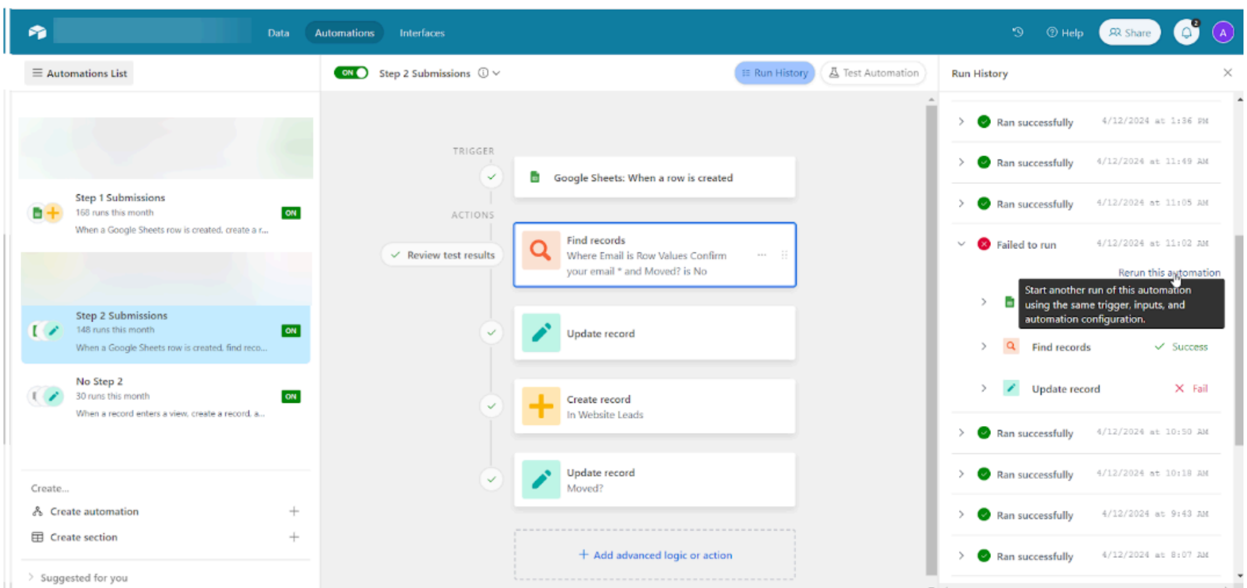
1. Website user entered mismatching emails.
   Here is what to do to fix it:
    a. Find his submissions on both Google Sheets files to identify the mismatch
    b. Fix the mismatching information
    c. Go to Test Automation section of your Airtable Automation
    d. Pick a row fixed row to run the test

e. Run the test



This will rerun the automation for the specified record.

Note, **do not use** the RERUN automation button on automation error log.



2. User submitted the Step 2 form more than 24 hrs after the Step 1 form submission.
   This happens sometimes.
   To fix it, follow these steps:
   a. Search for the record in the Airtable
   b. Change Moved Status to No
   c. Delete this same record from the Website Leads table
   d. Rerun the automation.

Video Examples

1. [No issues found, airtable bug](#) 🔗

2. Mismatching emails issue 🔗

Useful links

Name	URL	What is it?
Demo video	View 🔗	Demo of how the integration works
Behind-the-scenes video	View 🔗	Video explaining what happens behind-the-scenes of working integration
Website home page	Visit 🔗	-
Website giveaway form	Visit 🔗	Page where Step 1 form is located
Website step 2 form	Visit 🔗	Page where Step 2 form is located
Google drive folder of the integration	Open 🔗	Folder where all integration-related files are stored
Airtable base url	Access 🔗	Airtable base that is used in the integration
Step 1 Google Sheets file	Open 🔗	Google Sheets file that is used to store Step 1 Form responses
Step 2 Google Sheets file	Open 🔗	Google Sheets file that is used to store Step 2 Form responses
Step 1&2 Google Sheets file	Open 🔗	Google Sheets file that is used to merge Step 1 and Step 2 form responses
Process map	Open 🔗	Process map demonstrating integration flow.