Inquiry Follow-Up Kit

Collect requests, track next steps, and build a private owner digest.

Start with one real task. Use the guide, then work from a copy of the editable files. All worked examples are made up.

Inside this kit

- Google Forms intake and Sheets tracker
- Owner-only weekday email setup
- Date rules, error paths, and connected test checklist

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Connected test passed. Form intake, the empty-list check, a two-row owner email and matching time zones were verified. Complete your own setup and tests before switching on the schedule.

Keep new requests from slipping through

Put new job requests in one place. See who needs a reply. Get one private weekday email with the open items that need your attention. You still decide what to say and when to contact a customer.

The path is simple: Google Forms saves each request in Google Sheets. The sheet makes the list. Make reads one cell at 9 a.m. on weekdays and sends that list to the owner. If the list is empty, it sends nothing. There is no AI step and no customer email step.

The form-to-sheet path and two email cases passed a test with made-up requests. An empty list sent nothing. A two-row list sent one owner email. Make and the Sheet both showed America/New_York as their time zone. Add your own accounts and test your copy before you turn it on.

What you need

Use your own Google account for Forms and Sheets. Use a Make account and Gmail for the owner email. Make asks you to connect Sheets and Gmail on their own sign-in screens. They need separate connections. Accounts, service fees, and support are not included. Check your account limits before you turn on a schedule.

There are no passwords, account keys, real customer records, or live sheet IDs in the download. The sample rows use made-up contact details. Keep your sheet private to the people who handle requests.

Start with the list; add the email later

You can use the form and tracker before you set up Make. Finish steps 1-5 first. Each morning, open Dashboard and work through the list. After each call or email, change the row's next step and due date. This gives you a working list while the email part is off.

In this guide, "queue" means the list of requests to act on. A "digest" is one email that holds that list. A Make "blueprint" is a file that adds the email steps to your own Make account.

Files and the order to use them

1. Read this guide and setup-checklist.md.
2. Use form-copy.txt to build a Google Form.
3. Use inquiry-tracker.xlsx as a layout and sample workbook. The live Google Form will make its own response tab.
4. Copy the exact formula from google-sheets-formula.txt into a new Dashboard tab in the linked Google Sheet.
5. Import owner-daily-summary.blueprint.json into a new Make scenario.
6. Follow the module setup steps and the test plan. Leave the schedule off until tests pass.

The CSV file holds rows of sample text. It has no dropdowns, formulas, colors, or time zone. The Excel workbook (.xlsx) has sample rows and checks you can try. Use Google Sheets for the live list. Older Excel versions may not work with FILTER or LET, which the live list uses.

The XLSX also has working sample checks in columns M:N. They flag a bad date and show which rows belong in the queue. Dashboard B10 holds the sample check date. Change that date to try the due-date rules. These helper columns belong to the local sample. The live Google Sheet uses the separate Dashboard formula and today's date.

Step 1: build the form

Title: Ask about a job

Intro: Tell us what you need help with. We'll review your note and get back to you. This form does not book a visit. We may not see it right away. For a time-sensitive job, call [your business phone].

Replace [your business phone] with a number you answer before you share the form. If you don't offer urgent help, say that too. Don't leave a blank field in the live form.

Add these questions in this exact order. Google puts the date and time of each request in column A. This is called the timestamp.

- Your name: short answer, required. Column B.
- Phone number: short answer, required. Column C. Tell people to include the area code.
- Email address: short answer, optional. Column D. Use email validation if you want it.
- What work do you need?: short answer, required. Column E.
- Town: short answer, required. Column F. Do not ask for a full address at this stage.
- Anything else we should know?: paragraph, optional. Column G. Ask people not to include door codes or payment details.

Keep automatic email collection off for this layout. It can add a column and change the map. Leave response receipts off. Do not add a file upload or a customer email automation. Use your own response policy to decide whether sign-in or one-response limits fit your customers, then test from a signed-out browser.

Confirmation: Thanks. Your request is in. We'll review it and get back to you. A visit is not booked yet.

Step 2: link Forms to Sheets

In the form's Responses area, choose the Sheets link or select a response destination. Make a new spreadsheet for this form. Google creates a response tab. This guide uses the tab name Form Responses 1. If yours has a different name, rename it before setup or change every tab reference in the supplied formula.

Make sure the response tab has at least 1001 rows. A new linked tab may have only 101. Scroll to the bottom and add enough rows to reach 1001 before you add the Dashboard formula. This is space for one header row and 1,000 requests.

Send one synthetic form response yourself when you are ready to test. Confirm that A:G are Timestamp, Your name, Phone number, Email address, What work do you need?, Town, and Anything else we should know? Check the order, not just the words. If extra columns appear, fix the map before you add formulas. Do not connect the sample XLSX as a second intake source.

Keep the raw response columns in place. Do not insert, move, or delete A:G after setup. If you change form questions, recheck every column before resuming the schedule. Google Forms is the only intake writer; Make does not copy or append requests.

Step 3: add five owner columns

Add these headers to H:L on the response tab. They are staff fields in Sheets, not customer questions in Forms.

- H Status: New, Contacted, Waiting, Booked, or Closed. Add a dropdown with these choices. Blank means New. Only Closed is excluded from the digest.
- I Owner: the person handling the request. Blank is shown as unassigned.
- J Next action: one task, such as call about access or send written quote. Blank is shown as set next step.
- K Due: the next date to act. Use a real date cell, not a note such as Friday or ASAP.
- L Last contact: the last time a person contacted the customer. This is a record only; it does not send anything.

Use a date picker for K and L. Format K as a date. If a date was pasted as text, replace it with a date you choose from the picker. Text that looks like a date is still flagged for review. Set validation to reject non-date values where possible, but keep the formula check because pastes and imports can bypass a normal workflow.

Keep each request and its owner fields on the same row. Do not sort only A:G. Use a filter view, or select the whole A:L table when sorting. Do not write owner notes beside a separate QUERY or SORT result: rows can move and the notes can attach to the wrong request.

Step 4: choose dates and the queue rule

In the spreadsheet settings, choose your local time zone. Set recalculation to on change and every hour so TODAY updates before the morning run. The Make scenario time zone must match the sheet. For a Rhode Island business, America/New_York is a useful choice; choose your own zone if you work elsewhere. Use the named region so daylight saving changes are handled by the service.

The queue includes a row when it has a timestamp, is not Closed, and any of these is true:

- Status is blank or New. It stays on the list until a person changes it.
- Due is a real date on or before today, including overdue items.
- Due is nonempty text or another invalid value. It is marked DATE CHECK so it cannot hide a request.

A Contacted, Waiting, or Booked row with no due date is not in the daily queue. Give each open row a next action and due date after first contact. A future due date stays out until its day arrives. A Closed row stays out even if it has an old due date. Spaces and capitals around Closed don't change that rule.

"New" means you haven't sorted out the next step yet. It does not mean "arrived in the last 24 hours." Friday evening and weekend requests will still show on Monday. New rows repeat each weekday until you act. An overdue request repeats until you move its due date or close it. The kit does not record that an

email was read or a customer was contacted.

Step 5: make the Dashboard

Create a tab named Dashboard. Put Owner daily follow-up in A1. Paste the full formula from google-sheets-formula.txt into A2. Use the formula file, not a line copied from the printable guide. It reads rows 2 through 1001, so it covers up to 1,000 requests.

Keep INDIRECT around each source range. It holds the row address as text so a new form response can't move the start of the list away from row 2. In a real test, plain ranges moved when Forms added rows and hid new requests. The fixed ranges kept the new requests in view. If you later rename the response tab, update its name inside every INDIRECT range too.

The formula uses English function names and commas. If your sheet locale uses semicolons, change the argument separators carefully or use a locale that accepts the supplied formula. Do not change punctuation inside quoted text. A parse error must be fixed before Make is used.

A2 should contain a plain text list, one request per paragraph, or be blank when no row qualifies. It includes the response row number, name, service, town, status, due date, owner, and next action. It leaves phone numbers, email addresses, and the free-text customer note out of the email. Open the private sheet to see contact details. Keep sensitive notes out of the Next action field too.

At 800 rows, plan how you'll handle more requests. To grow this sheet, extend every source range in the formula together and repeat the tests. Requests past row 1001 won't appear until you do that. Long text can also hit the size limit for a cell or email. Keep next actions short and check the size of your list.

Step 6: import the Make file

Make a new empty scenario. Do not import over another scenario you want to keep. In the scenario menu, choose Import blueprint and select owner-daily-summary.blueprint.json. The file has two native modules and a filter. It contains no connections or real IDs.

The first block, called a module in Make, is Google Sheets, Get a Cell, version 2. Select your own Google Sheets connection. Choose Enter manually for the search method. Set Spreadsheet ID to the ID from your linked spreadsheet URL. Set Sheet Name to Dashboard. Set Cell to A2. Use formatted value to read the finished list.

The filter before Gmail is called Only send a nonempty queue. It requires the cell value to exist and not equal an empty string. Keep both checks. If your import asks you to rebuild a field, select the first module's Value output. Do not map a whole bundle or the sheet formula text.

The second module is Gmail, Send an email, version 4. Select your own Gmail connection. Replace owner@example.invalid with the owner's one private email address. Keep that address fixed. Never map a customer's email from a sheet row into To, CC, or BCC. Leave CC, BCC, and attachments empty.

Use the supplied subject. The Body type setting is Raw HTML. Keep the supplied body: it puts the list in a block that keeps its line breaks. The escapeHTML function makes typed characters show as text. It stops a note from being read as email code. Keep the mapped Value and that function. The email tells the owner to open the tracker. You can add your private sheet link by hand for a shortcut.

You must choose your own accounts after import. In our test, the same two blocks were saved through Make's connector and read back. Both email cases passed after the Google connection was restored. The editor's file-import step has not been tested. Keep the schedule off until your own test and time-zone check pass. If one block fails to import, rebuild that block with the settings above. Don't add a customer-send or AI block.

Step 7: schedule one weekday run

After the tests pass, open scheduling. Choose Weekdays, Monday through Friday, at 09:00 in the scenario's chosen local time zone. The schedule is set in Make after import; it is not embedded in this portable blueprint. Check the next run shown by Make. It should be the next weekday at 9 a.m. in the intended zone.

Keep one active copy only. Two copies can send two emails. Don't add an automatic retry to the email step. If a run times out, it may still have sent the email. Check Sent mail and Make history before you try again. This setup cannot promise exactly one delivery in every failure case.

Test before any real request depends on it

Use a separate test form, sheet, and owner inbox you control. These steps create test data and send owner email, so perform them only when you are ready and have permission to use the accounts. The included local fixture tests do not perform them for you.

1. New: submit a made-up request. Leave status blank. A2 should include it.
2. Due today: mark Contacted and pick today's date. It should stay in the list.
3. Overdue: pick yesterday. It should stay in the list.
4. Future: pick tomorrow with Contacted status. It should leave the list.
5. Closed: set Closed with an old due date. It should stay out.
6. Bad date: put a non-date in Due on an open row. If validation blocks it, use the sample fixture instead. The formula should show DATE CHECK when such a value exists.
7. Empty: close all test requests. A2 should be blank. Run once only with permission. Gmail must show zero operations and no new sent message.
8. Digest: reopen two test rows. With permission, run once. Sheets should have one read and Gmail one send. Confirm one email in the owner's inbox with both rows, no customer recipient, and matching next steps.
9. Overnight: check A2 after the date changes and before the next run. Confirm the next-day due item appears. Check the selected time zone and next weekday run again.

Record the run time, time zone, row cases, Make execution outcome, recipient, Sent message, and received email. Hide private values in any shared evidence. Keep the schedule off until all results match. Import success alone is not a passed smoke test.

A simple daily habit

At the start of the day, open the sheet and take the next action. After a call or email, update Last contact, Status, Next action, Due, and Owner. Close a row only when no follow-up remains. A booked visit can still need a reminder or quote; keep it open with a due date if there is work to do.

Use your normal channel to contact the customer. This kit sends only the owner's list. It does not prove that a customer received a reply. If Make fails, use the sheet by hand while you fix it.

Follow one request from new to closed

Use Sample Alex's gate repair row in the workbook. This is a made-up request. The sample date is November 6, 2026.

1. A new request comes in. Status is blank. The list shows Alex with "New (blank)," "unassigned," and "set next step." A blank status won't hide a new request.
2. You call Alex. Set Status to Contacted and put your name in Owner. Write "Confirm gate access" in Next action. Pick November 9, 2026 in Due. Record the call in Last contact. On the November 6 sample date, Alex drops out of the list because the next action is still ahead.
3. Change the sample date in Dashboard B10 to November 9. Alex is due and appears again. In your live Google Sheet, today's date makes that change for you.
4. A visit is booked, but you still need to send the written quote. Set Status to Booked. Set Next action to "Send written quote" and pick the day you will do it. Keep the row open while that task remains.
5. When no follow-up is left, set Status to Closed. The row leaves the daily list. Keep it in the sheet as a record. A later new job should get its own form response.

The owner email follows the same list. It doesn't make these changes for you. Restore the workbook's sample date and rows after you try this, or work from a copy.

Troubleshooting

No email arrived

Check A2 first. Blank means no digest is expected. If there is text, check that the scenario is on, the next run is right, the filter maps Value, and both connections work. Check Make history, Sent mail, spam, and the owner address. Do not keep clicking Run once before checking whether a previous send succeeded.

A new request is missing

Look at the form response tab. If it is not there, check the form link and response destination. If it is there, check column order, timestamp, range limit, and Closed status. Check for a renamed response tab or a formula error. Do not copy the request into multiple rows to make it show up.

Dates look wrong

Use the sheet date picker and confirm the sheet locale and time zone. Due must be a real date value. Text such as 03/04 can mean different days in different locales. Replace it with a clear chosen date. Compare the sheet's TODAY with your local date, then check Make's time zone.

A row keeps coming back

That is expected for New, overdue, or invalid-date rows. Take the action, set the next valid due date, or close it if no more action is needed. The digest does not change status or mark work done.

You got two emails

Look for two active scenario copies or a manual run near the scheduled run. Check execution history and Sent mail. Pause duplicate copies. If delivery is uncertain after an error, check receipts before a retry. Do not add a second send as a backup.

A formula or connection breaks

Turn the schedule off. Keep handling requests in Sheets. Restore the last known formula or reconnect through the service's own screen. Never put passwords or tokens in a cell, downloaded JSON, or support message. Repeat the empty and two-row tests before resuming.

Sources and limits

Reviewed November 6, 2026. Google documents native response linking in Choose where to save form responses: https://support.google.com/docs/answer/2917686/choose-where-to-save-form-responses . Make documents blueprint import and user-owned connections at https://help.make.com/blueprints and scheduling at https://help.make.com/schedule-a-scenario . Its native JSON envelope example is at https://developers.make.com/api-documentation/api-reference/templates . The source-evidence.json file records current module names, versions, field shapes, and the public native template inspected. Interface labels can change; recheck the service if your screen differs.

Local checks cover the package files, formula text, sample queue rules, blueprint fields, export hashes, and PDF layout. A live test proved that Form responses reached the Sheet and fixed INDIRECT ranges kept new rows in view. After an expired Google connection was restored, an empty list sent no email and a two-row list sent one owner email. That email kept the right actions, escaped typed HTML, and left out phone numbers, customer emails and customer notes. The two successful runs used three Make operations and three credits in total. These are usage units, not a dollar cost. Make and the Sheet both showed America/New_York as their named time zone. Editor file import, a scheduled 9 a.m. run, the next-run display and overnight date change were not observed.

Setup and connected test checklist

[ ] Use separate test form, sheet, and owner inbox first.

[ ] Form questions match B:G exactly; auto email collection and receipts are off.

[ ] Native Forms response link writes to the intended Sheet, once per request.

[ ] Response tab has at least 1001 rows before the Dashboard formula is added.

[ ] Add H Status, I Owner, J Next action, K Due, L Last contact.

[ ] Status dropdown: New, Contacted, Waiting, Booked, Closed.

[ ] K and L use real dates. Blank H means New. Only Closed is excluded.

[ ] Sheet locale, named time zone, and hourly recalculation checked.

[ ] Dashboard A2 has exact supplied formula, no parse or reference error.

[ ] Formula uses INDIRECT for all eight source ranges. A new real test response stays in the list after Forms inserts a row.

[ ] Import the setup JSON into a new scenario; keep it inactive.

[ ] Sheets connection selected; correct spreadsheet ID, Dashboard, A2, formatted value.

[ ] Filter tests Value exists AND is not empty.

[ ] Gmail connection selected separately; only one fixed owner To address.

[ ] No mapped customer recipients, CC, BCC, attachments, or customer send modules.

[ ] Body maps escapeHTML(1.value); no raw customer text as HTML.

[ ] New, due today, overdue, future, Closed, and invalid-date cases checked.

[ ] Empty queue test: no Gmail operation, no sent mail.

[ ] Two-row queue test: one Gmail operation, one matching received owner email.

[ ] Overnight formula refresh checked. Both time zones match.

[ ] Make weekdays Monday-Friday, 09:00; next run read back.

[ ] One active scenario copy only, after the owner approves activation.

[ ] Saved evidence includes time, cases, execution, recipient and delivery receipt.

Current packaged status: connected test passed. Form intake, empty/two-row owner-email cases and matching America/New_York time zones passed in an isolated test. Editor file import, scheduled firing, next-run display and overnight rollover were not observed. This download does not set up your accounts or turn on a schedule.