

Google Sheet Template

Make your own working copy

Open this tool: leadai.itforall.org/google-sheet-template.php

Purpose and access

The template provides a starting structure for lead tracking and automation. It is available through an active trial or subscription. You need a Google account and access to the template link shown on the portal.

1. Open and copy

Sign in to the portal, open Google Sheet Template and use the ready-template link. Make your own copy in the Google account that will own the workflow. Do not enter real leads into a shared demonstration sheet.

2. Review the structure

Review the Leads tab, Config settings and any included script before running it. Replace example sender, campaign, email and WhatsApp details. Preserve the columns needed by the chosen script.

3. Choose one automation route

Use the template's supplied automation or generate a script through LeadFlow AI / Email & Brevo Automation. Do not paste multiple generators into the same project: function names and triggers may conflict.

4. Test one lead

Add your own email and phone in the lead tab. Use Process Leads Now if supplied by that template, or processLeads in your chosen generated script. Review authorisation requests and results before enabling schedules.

5. Add your real leads

Import or connect your leads using the exact configured headers. The template itself is not a Meta Ads connector. Check duplicates, phone formatting and contact permissions before allowing any automation to run.

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Maintain the Sheet

Keep tracking reliable

Do not rename status/date headers or erase previously sent flags casually. Those values prevent repeated processing. Make a backup before bulk changes and record who owns the workflow.

Control access

Limit edit access to trusted staff. Keep configuration and personal lead records out of public links. A public QR code must not point to a private lead database.

Template link will not open

Confirm you are using the correct Google account. If the source template requires access or has been moved, contact support@itforall.org. Do not share your password. A website subscription does not override Google file permissions.

Automation is missing or failing

A copied Sheet may need its own authorisation and trigger setup. Check its bound project and review the matching tool guide. Exact menu names can differ between template versions.

New columns or new campaign

Keep a campaign backup and test changed mappings with a single row. Do not assume changing the website form updates the code in an existing Google Sheet.

Before handing over

Record the owner account, tab names, script route, trigger owner and stop rules. Share access directly with the new responsible person rather than distributing credentials.