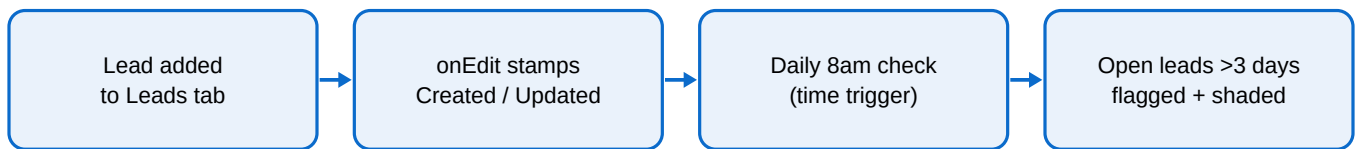


Google Sheets Lead Tracker with stale-lead flags

A simple lead CRM in Google Sheets. An Apps Script stamps Created / Last Updated times as you type and flags open leads nobody has contacted in 3+ days.



What it does

- Leads tab with 13 columns: Lead ID, Created, Name, Phone, Email, Source, Service, Status, Next Step, Last Contact, Last Updated, Stale?, Notes.
- Type in any lead row and the script fills Created (first time), a Lead ID, and Last Updated. Changing Status also sets Last Contact.
- Menu "Lead Tracker" > "Flag stale leads now": any lead not Won/Lost with no contact for more than 3 days gets "STALE (N days)" and a light-red row.
- One click installs a daily 8am check so the flags stay current without you opening the sheet.

Files

- **hwa-lead-tracker.gs**: Apps Script code (.gs)
- **hwa-lead-tracker-template.xlsx**: Sheet template (.xlsx, with Status dropdown)
- **hwa-lead-tracker-template.csv**: Sheet template (.csv)

Install (step by step)

- 1 Open Google Drive, click New > File upload, and upload **hwa-lead-tracker-template.xlsx**. Open it, then File > Save as Google Sheets. (Or: create a blank Google Sheet, File > Import > Upload the .csv, and rename the tab to **Leads**.)
- 2 Check the first tab is named exactly **Leads** and row 1 has the 13 headers. Delete the two example rows when you are ready.
- 3 Click Extensions > Apps Script. Delete the starter code, paste all of **hwa-lead-tracker.gs**, and click Save (disk icon).
- 4 Go back to the sheet and reload the browser tab. A **Lead Tracker** menu appears after a few seconds.
- 5 Click Lead Tracker > Flag stale leads now. Google asks you to authorize the script the first time: choose your account, then Advanced > Go to (project name) > Allow. This is your own script in your own sheet.
- 6 Click Lead Tracker > Install daily stale check (8am). That adds one time trigger (see it in Apps Script > Triggers). Remove it any time with Lead Tracker > Remove daily stale check.
- 7 Optional: change STALE_DAYS (default 3) or CLOSED_STATUSES at the top of the script, then Save.

Test it

- Type a name in a new row: Created, Lead ID and Last Updated fill in.
- Set a row's Last Contact to a date 5 days ago and Status to New, then run Flag stale leads now: the row turns light red and shows STALE (5 days).
- Change that row's Status to Won and run it again: the flag clears.

Good to know

- Simple triggers (onEdit) run on edits made by people, not on rows added by other automations. The daily check still covers those rows.
- Dates are compared using the sheet's time zone (File > Settings).

This is a free sample to copy and adapt. It is not a managed service and comes without support or warranty. Test it with sample data before using it with real customers.

Built with AI assistance, reviewed before delivery.

Download: <https://hwa-rescue-pack.pages.dev/samples/sheets-lead-tracker/>