



Build Your Own BRE Tracking System in Google Drive

A step-by-step guide using Google Drive folders, Google Sheets, and two formulas

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What you're building and why

This guide walks you through building a free Business Retention & Expansion (BRE) tracking system using Google Drive and Google Sheets. It was designed by a small, rural economic development office that was moving away from paper notes and filing cabinets but wasn't ready to pay for a traditional CRM.

When you're finished, you'll have three connected pieces:

- **A folder system:** one main folder, with a folder for every business you work with. Each business folder holds everything related to that company: its profile spreadsheet, meeting notes, project notes, and data requests.
- **A Business Profile spreadsheet for each business:** a visit log at the bottom where you record every interaction, and a dashboard at the top that automatically shows the most recent information from that log.
- **A BRE Data Overview spreadsheet:** one row per business, pulled in live from every profile, with a dashboard at the top that totals and averages your data (employment, wages, sales, space needs, and more).

Why it works: every conversation is saved and searchable, nothing is overwritten, your whole team works from the same information, and you can answer questions like "What's the average starting wage for our manufacturers?" in seconds instead of digging through notebooks.

Honest expectation: This takes some time to set up. Plan a few focused hours to design and test your first profile and the overview. Once it's built, adding a business takes only a few minutes, and logging a visit takes less time than writing it on paper.

What you'll need

- **Access to Google Drive and Google Sheets.** This system runs entirely inside Google Drive. A Google Workspace account for your organization is ideal because it lets you restrict access to your organization's domain. A free Gmail account also works (see Step 1).
- **A computer with a web browser** (Chrome recommended). You can view and log visits from the Google Sheets mobile app, but do the setup on a computer; some steps, like approving linked sheets, are much easier there.
- **The templates (optional but recommended).** Example templates for the Business Profile and the BRE Data Overview are available on our website, knoxadf.com/data. You can copy them and adjust, or build your own from scratch using this guide.

Before you start: decide what you'll track

This is the most important step. Every Business Profile you create will be a copy of your first one, so **decide on all of your data points now**. Adding a new data point later means updating every profile and the overview one at a time.

These are the columns we use in the visit log (the section where you record what you learn at each visit or call). Each one becomes a column heading, in this order, starting in column A:

Column	Visit log heading	What goes here
A	Date	Date of the visit or call
B	Last Contact – Name	Your staff member who made the contact
C	Met with	Who you spoke with at the business
D	Type of meeting	In-Person, Virtual, Phone, Event, etc.
E	Employee #	Current number of employees
F	Own/Lease	Whether they own or lease their building
G	Square footage	Building size
H	Lease Rate	Lease rate per sq ft (or NA)
I	Space Needs	Additional sq ft they need (0 if none)
J	Hours	Operating hours
K	Annual Sales	Annual revenue
L	Starting Wage	Entry-level hourly wage
M	Shift(s)	Shift schedule
N	Benefits	Benefits offered
O	Challenges	Threats or challenges they mentioned
P	Opportunities	Growth or expansion opportunities

Column	Visit log heading	What goes here
Q	Recommendations	Your follow-ups and recommended next steps
R	Other Notes	Anything else worth remembering

To add your own data points, add more columns to the right (S, T, U...). Just make sure each one also gets a spot on the profile dashboard (Step 2) and a column in the overview (Step 3).

Tip: Enter numbers as plain numbers: 5000, not 5,000 sq ft, and 18.75, not \$18.75/hr. Use cell formatting to add \$ signs and commas. Numbers typed with words can't be added up or averaged in the overview.

Step 1: Set up your folders

1a. Create the main folder

1. Go to **drive.google.com**. If your organization uses a Shared Drive, open it; otherwise use My Drive.
2. Click **+ New** → **New folder**, name it something like **BRE Database**, and click **Create**.
3. This main folder will hold your BRE Data Overview spreadsheet and every business folder.

1b. Create a folder for each business

1. Open the **BRE Database** folder.
2. Click **+ New** → **New folder** and name it for the business. Choose a naming pattern that is easy to search and sort, and use it every time. We use **Business Name - BRE Overview** (for example, **ABC Manufacturing - BRE Overview**).
3. Repeat for every business you want to track (or add them as you go in Step 4).

Your finished structure will look like this:

```
BRE Database/
  BRE Data Overview                (spreadsheet)
  Blank Business Profile - MASTER  (spreadsheet, optional, see Step 4)
  ABC Manufacturing - BRE Overview/
    ABC Manufacturing - Business Profile (spreadsheet)
    Meeting notes, project notes, data requests
  DEF Manufacturing - BRE Overview/
    DEF Manufacturing - Business Profile
  Archived Businesses/              (optional, see Step 5)
```

1c. Lock down who can see it

Your folders will contain sales figures, wages, and plans that businesses shared with you in confidence. Set sharing on the **main folder**; everything inside it follows the same settings.

If you use Google Workspace (an organization domain):

1. Right-click the **BRE Database** folder and choose **Share** → **Share**.
2. Under **General access**, choose either **Restricted** (only people you add) or **[Your organization's name]** (anyone signed in with your organization's email).
3. Add your staff by email and give them **Editor** access.
4. Click **Done**.

If you use a free Gmail account: keep **General access** set to **Restricted**, and add each staff member by email as an **Editor**.

Never set General access to **Anyone with the link**. Anyone who gets that link could open your business data.

Step 2: Build your first Business Profile

The Business Profile has two parts: a **dashboard** at the top (rows 1–13) that summarizes the business, and a **visit log** at the bottom (headings in row 14, entries starting in row 15).

Business Profile BRE Database Template/Example													
File Edit View Insert Format Data Tools Extensions Help													
50% \$ % .0 .00 123 Default... 10 B I A													
E21	fx												
1	Company Profile: ABC Manufacturing												
2	Business Description: 6/1/2026												
3	General: Business Type: Manufacturing												
4	Employees #: 112												
5	Annual Sales: \$22,000,000.00												
6	Property: Own												
7	Building Size: 125000												
8	Lease Rate: NA												
9	Space Needs: 5000												
10	Hours: 24/7												
11	Year Opened: 1950												
12	Workforce: Starting Wage: \$18.75												
13	Shifts: 6:30am-3pm, 2:4:401k Match												
14	Benefits: 4% 401k Match												
15	Second Chance: Yes												
16	Hires Under 18: Yes												
17	Internships: Yes												
18	Union: No												
19	Currently Hiring: Yes												
20	Notes: Threats/Challenges: Called because they need 5,000sqft of storage space for 12 months.												
21	Opportunities: Completed their expansion project.												
22	Other Notes: Other Notes												
23	Last meeting: Virtual												
24	Last Contacted By: LEDO Rep Name												
25	Date Last Contact - Nan Met with Type of meeting Employee # Own/Lease Square footage Lease Rate Space Needs Hours Annual Sales Starting Wage: Shift(s) Benefits Challenges Opportunities Recommendatic Other Notes												
26	5/1/24 LEDO Rep Name John Doe In-Person 100 Own 100,000 NA 25,000 24/7 \$20,000,000.00 \$18.50 6:30am-3pm, 2:4:401k Match, Aging workforce Looking to expand: Connect with JobsOhio about expar												
27	5/10/25 LEDO Rep Name John Doe In-Person 115 Own 125,000 NA 0 24/7 \$22,000,000.00 \$18.75 6:30am-3pm, 2:4:401k Match, Still working to ir Completed their Connect with local OMJ office.												
28	6/1/26 LEDO Rep Name John Doe Virtual 112 Own 125,000 NA 5,000 24/7 \$22,000,000.00 \$18.75 6:30am-3pm, 2:4:401k Match, Still working to ir Completed their Connect with local OMJ office.												

Example Business Profile: the dashboard at the top, the visit log starting at row 14.

2a. Create the spreadsheet

Option 1: Start from our template. Download or open the Business Profile template from knoxadf.com/data. In Google Sheets, click **File** → **Make a copy**, name it (for example, **ABC Manufacturing - Business Profile**), choose the business's folder as the location, and click **Make a copy**. Our template already has the layout and cell positions used in this guide.

Option 2: Build from scratch. Open the business's folder, click **+ New** → **Google Sheets** → **Blank spreadsheet**, name it, and set it up using the layout below.

Important: Keep only **one tab** in the profile spreadsheet, or make sure the profile is the **first tab**. The overview's formula reads from the first tab unless you tell it otherwise.

2b. Lay out the dashboard and visit log

Type the labels in the cells shown below. The cells in the "Value cell" column are where the information will appear. If you use our template, this is already done; use this table as your reference.

Section	Label (cell)	Value cell	How it's filled
Header	Company Profile: (A1)	B1	Type the business name
Header	Business Description: (A2)	C2	Formula: latest visit date (from column A)
Header	(description box, A3)	A3	Type a short description
General	Business Type: (E3)	F3	Manual
General	Employees #: (E4)	F4	Formula (column E)
General	Annual Sales: (E5)	F5	Formula (column K)
General	Property: (E6)	F6	Formula (column F)
General	Building Size: (E7)	F7	Formula (column G)
General	Lease Rate: (E8)	F8	Formula (column H)
General	Space Needs: (E9)	F9	Formula (column I)
General	Hours: (E10)	F10	Formula (column J)
General	Year Opened: (E11)	F11	Manual
Workforce	Starting Wage: (H3)	I3	Formula (column L)
Workforce	Shifts: (H4)	I4	Formula (column M)
Workforce	Benefits: (H5)	I5	Manual*
Workforce	Second Chance: (H6)	I6	Manual
Workforce	Hires Under 18: (H7)	I7	Manual
Workforce	Internships: (H8)	I8	Manual
Workforce	Union: (H9)	I9	Manual
Workforce	Currently Hiring: (H10)	I10	Manual
Notes	Threats/Challenges: (K3)	L3	Formula (column O)
Notes	Opportunities: (K4)	L4	Formula (column P)
Notes	Other Notes: (K5)	L5	Formula (column R)
Notes	Last meeting: (K6)	L6	Formula (column D)
Notes	Last Contacted By: (K7)	L7	Formula (column B)
Contacts	Address: (A10)	B10	Manual
Contacts	Owner: (A11)	B11	Manual
Contacts	Primary Contact: (A12)	B12	Manual

Section	Label (cell)	Value cell	How it's filled
Contacts	Secondary Contact: (A13)	B13	Manual
Visit log	Column headings (row 14)	A14:R14	Type the 18 headings from the planning table

Yellow rows are updated by hand. Highlight those value cells yellow in your sheet (select the cell, then click the paint-bucket **Fill color** icon) and type a note in D1 such as `*yellow highlight means cell must be updated manually*`. That way, anyone using the sheet knows which cells to change themselves.

*Benefits is recorded in the visit log (column N) for history, but we update the dashboard cell by hand. If you'd rather it update automatically, give I5 the same formula as the others, pointed at column N.

Recommendations (column Q) stays in the visit log only. It's your running to-do list for that business and doesn't need a dashboard spot.

2c. Add the "most recent entry" formula

This is what makes the profile work. Not every visit will update every data point; one visit might give you a new employee count, and the next only a new wage. This formula looks down one column of the visit log, skips the blank cells, and returns the **last** value entered, so the dashboard always shows the most recent information and never goes blank just because the latest visit didn't cover that topic.

Here is the formula for **Employees # (cell F4)**, which reads column E of the visit log:

```
=IFERROR(INDEX(FILTER(E15:E, E15:E<>""), ROWS(FILTER(E15:E, E15:E<>""))), "")
```

How it works, piece by piece:

- `E15:E` looks at column E from row 15 (the first visit row) down to the bottom of the sheet.
- `FILTER(E15:E, E15:E<>"")` keeps only the cells that aren't blank. (`<>""` means "is not empty.")
- `ROWS(...)` counts how many filled cells there are, which is also the position of the last one.
- `INDEX(..., that count)` returns the value in that last position: the most recent entry.
- `IFERROR(..., "")` shows a blank cell instead of an error when no visits have been logged in that column yet.

Why row 15 and not the whole column? If the formula looked at the whole column (for example `F:F`), it could include the dashboard cell it's sitting in, which creates a "circular dependency" error. Starting at row 15 keeps the formula looking only at the visit log.

Paste the formula into each formula cell, changing the **column letter (all four times)** to match the visit log column:

Dashboard field	Cell	Formula to paste
Latest visit date	C2	=IFERROR (INDEX (FILTER (A15:A, A15:A<>""), ROWS (FILTER (A15:A, A15:A<>""))), "")
Employees #	F4	=IFERROR (INDEX (FILTER (E15:E, E15:E<>""), ROWS (FILTER (E15:E, E15:E<>""))), "")
Annual Sales	F5	=IFERROR (INDEX (FILTER (K15:K, K15:K<>""), ROWS (FILTER (K15:K, K15:K<>""))), "")
Property (Own/Lease)	F6	=IFERROR (INDEX (FILTER (F15:F, F15:F<>""), ROWS (FILTER (F15:F, F15:F<>""))), "")
Building Size	F7	=IFERROR (INDEX (FILTER (G15:G, G15:G<>""), ROWS (FILTER (G15:G, G15:G<>""))), "")
Lease Rate	F8	=IFERROR (INDEX (FILTER (H15:H, H15:H<>""), ROWS (FILTER (H15:H, H15:H<>""))), "")
Space Needs	F9	=IFERROR (INDEX (FILTER (I15:I, I15:I<>""), ROWS (FILTER (I15:I, I15:I<>""))), "")
Hours	F10	=IFERROR (INDEX (FILTER (J15:J, J15:J<>""), ROWS (FILTER (J15:J, J15:J<>""))), "")
Starting Wage	I3	=IFERROR (INDEX (FILTER (L15:L, L15:L<>""), ROWS (FILTER (L15:L, L15:L<>""))), "")
Shifts	I4	=IFERROR (INDEX (FILTER (M15:M, M15:M<>""), ROWS (FILTER (M15:M, M15:M<>""))), "")
Threats/Challenges	L3	=IFERROR (INDEX (FILTER (O15:O, O15:O<>""), ROWS (FILTER (O15:O, O15:O<>""))), "")
Opportunities	L4	=IFERROR (INDEX (FILTER (P15:P, P15:P<>""), ROWS (FILTER (P15:P, P15:P<>""))), "")
Other Notes	L5	=IFERROR (INDEX (FILTER (R15:R, R15:R<>""), ROWS (FILTER (R15:R, R15:R<>""))), "")
Last meeting (type)	L6	=IFERROR (INDEX (FILTER (D15:D, D15:D<>""), ROWS (FILTER (D15:D, D15:D<>""))), "")
Last Contacted By	L7	=IFERROR (INDEX (FILTER (B15:B, B15:B<>""), ROWS (FILTER (B15:B, B15:B<>""))), "")

<

The formula in the Building Size cell pulls the most recent Square footage entry from the visit log. (This screenshot shows the original G:G version; use the G15:G version above.)

If the date in C2 shows as a number (like 46174), select C2 and click **Format** → **Number** → **Date**.

2d. Log a visit

1. Go to the first empty row under the visit log headings (row 15 for the first visit, then 16, 17, and so on).
2. Fill in what you learned. **Leave cells blank** for anything that didn't come up; the dashboard will keep showing the last known value.
3. **Always add new visits at the bottom, in date order.** The formula treats the lowest filled row as the most recent. Never overwrite or delete old rows; they are your history.

Test it: Type a test visit in row 15 and watch the dashboard fill in. Add a second row with only a new employee count and confirm that only Employees # changes. Delete the test rows when you're done (select them and press **Delete**, which clears the contents without removing the rows).

Optional: Add dropdowns so everyone types things the same way (this matters for the overview math). Select the cells (for example D15:D), click **Data** → **Data validation** → **Add rule**, choose **Dropdown**, and enter options such as In-Person, Virtual, Phone. Do the same for Business Type (F3) with your industry categories.

Step 3: Build the BRE Data Overview spreadsheet

The overview has the same idea as the profile: a **dashboard at the top**, then **one row per business** underneath. Each cell in a business's row pulls live from that business's profile, so you never retype anything.

=IMPORTRANGE(, "F4:F4")															
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
Google DriveBRE Database						General Summary:		Wage Summary							
						Total Businesses:		2	Total Avg:		\$19.23				
						Total Annual Revenue:		\$82,000,000.00	Avg MFG:		\$19.23				
						Total Employee #:		372							

Example BRE Data Overview: summary dashboard at the top, one row per business below. (Links blurred.)

3a. Create and lay out the spreadsheet

1. Open the main **BRE Database** folder and click **+ New** → **Google Sheets** → **Blank spreadsheet**. Name it **BRE Data Overview**. (Or copy the overview template from knoxadf.com/data into this folder with **File** → **Make a copy**.)

2. Leave **rows 1–10** for the dashboard (you'll add those formulas in 3d).
3. In **row 11**, you can add group labels such as General Information, Building & Operations, Workforce, Notes, Contact (optional).
4. In **row 12**, type the column headings from the table in 3b.
5. **Freeze the dashboard and headings:** click any cell in row 12, then click **View** → **Freeze** → **Up to row 12**. Now the dashboard and headings stay visible as you scroll through businesses.
6. Business rows start at **row 13**.

3b. Columns and what each one pulls

The overview columns should match the data points on your profile dashboards. **Column A holds the link to each business's profile**; every other formula in that row uses it. Here is the full layout for row 13 (your first business):

Col	Heading (row 12)	Profile cell	Formula in row 13
A	Profile Link	—	Paste the URL (see 3c)
B	Last Contact Date	C2	=IMPORTRANGE(\$A13, "C2")
C	Business Name	B1	=IMPORTRANGE(\$A13, "B1")
D	Business Type	F3	=IMPORTRANGE(\$A13, "F3")
E	Employees #	F4	=IMPORTRANGE(\$A13, "F4")
F	Annual Sales	F5	=IMPORTRANGE(\$A13, "F5")
G	Property	F6	=IMPORTRANGE(\$A13, "F6")
H	Building Size	F7	=IMPORTRANGE(\$A13, "F7")
I	Lease Rate	F8	=IMPORTRANGE(\$A13, "F8")
J	Space Needs	F9	=IMPORTRANGE(\$A13, "F9")
K	Hours	F10	=IMPORTRANGE(\$A13, "F10")
L	Year Opened	F11	=IMPORTRANGE(\$A13, "F11")
M	Starting Wage	I3	=IMPORTRANGE(\$A13, "I3")
N	Shifts	I4	=IMPORTRANGE(\$A13, "I4")
O	Benefits	I5	=IMPORTRANGE(\$A13, "I5")
P	Second Chance	I6	=IMPORTRANGE(\$A13, "I6")
Q	Hires Under 18	I7	=IMPORTRANGE(\$A13, "I7")
R	Internships	I8	=IMPORTRANGE(\$A13, "I8")
S	Union	I9	=IMPORTRANGE(\$A13, "I9")
T	Currently Hiring	I10	=IMPORTRANGE(\$A13, "I10")

Col	Heading (row 12)	Profile cell	Formula in row 13
U	Threats/Challenges	L3	=IMPORTRANGE(\$A13, "L3")
V	Opportunities	L4	=IMPORTRANGE(\$A13, "L4")
W	Other Notes	L5	=IMPORTRANGE(\$A13, "L5")
X	Last Meeting	L6	=IMPORTRANGE(\$A13, "L6")
Y	Last Contacted By	L7	=IMPORTRANGE(\$A13, "L7")
Z	Address	B10	=IMPORTRANGE(\$A13, "B10")
AA	Owner	B11	=IMPORTRANGE(\$A13, "B11")
AB	Primary Contact	B12	=IMPORTRANGE(\$A13, "B12")

3c. Link your first business

1. Open that business's **Business Profile** spreadsheet in a new browser tab.
2. Click the address bar at the top of the browser and copy the full URL (it starts with `https://docs.google.com/spreadsheets/d/`).
3. Go back to the **BRE Data Overview** and paste the URL into **A13**.
4. Click **C13** and type `=IMPORTRANGE($A13, "B1")`, then press Enter.
5. The cell will show **#REF!** the first time. Hover over or click the cell, and click the blue **Allow access** button. This connects the two spreadsheets. You only do this **once per profile**. The business name should now appear.
6. Type the formulas for the rest of the row using the table in 3b.

The general form of the formula is:

```
=IMPORTRANGE($A13, "F4")
```

- `$A13` points to the profile URL in column A of the same row. The `$` keeps it locked to column A when you copy the formula sideways, but lets the row number change when you copy it down.
- `"F4"` is the cell in the profile to bring over. It **must be in quotation marks**.

Watch out: When you copy a formula to the next column, Google Sheets does **not** change the cell inside the quotation marks. After copying, edit `"F4"` to the correct cell for that column (`"F5"`, `"F6"`, and so on). The table in 3b lists every one. This is the most common setup mistake: if several columns show the same value, check the quoted cell references.

`=IMPORTRANGE(https://docs.google.com/spreadsheets/d/1... 'F5:F5')`

The IMPORTRANGE formula brings one cell from a business profile into the overview. (Link blurred.)

Good news: You only type row 13's formulas once. For every business after that, you copy the row down and paste a new URL into column A (Step 4).

3d. Build the overview dashboard

Now put summary formulas in rows 1–10. Type a label in one cell and the formula in the cell next to it. These are the ones we use:

Label	Formula
Total Businesses	=COUNTA (C13:C)
Total Employees	=SUM (E13:E)
Total Annual Sales	=SUM (F13:F)
Total Space Needs (sq ft)	=SUM (J13:J)
Businesses Currently Hiring	=COUNTIF (T13:T, "Yes")
Average Starting Wage (all)	=IFERROR (AVERAGE (M13:M), "")
Average Starting Wage – Manufacturing	=IFERROR (AVERAGEIF (D13:D, "Manufacturing", M13:M), "")
Annual Sales – Manufacturing	=SUMIF (D13:D, "Manufacturing", F13:F)
Employees – Manufacturing	=SUMIF (D13:D, "Manufacturing", E13:E)

To total or average by a different industry, replace "Manufacturing" with any Business Type you use. It must match the spelling in the profiles exactly, which is why a Business Type dropdown (Step 2d) helps.

Optional: an automatic industry breakdown. Rename the overview's first tab **Businesses** (double-click the tab name). Click + at the bottom left to add a tab named **Industry Summary**, and paste this into cell A1. It builds a table showing businesses, employees, and sales for every industry at once:

```
=QUERY(Businesses!C13:F, "select D, count(C), sum(E), sum(F) where C is not null  
group by D label count(C) 'Businesses', sum(E) 'Employees', sum(F) 'Annual Sales'",  
0)
```

Step 4: Add each new business

Once your first profile and the overview are working, every new business follows the same routine.

Recommended: Make one extra copy of your finished profile, clear out all the business-specific information and visit rows, and save it in the main folder as **Blank Business Profile – MASTER**. Copy from this master each time so you never have to clean out another business's data.

4a. Create the profile

1. In the **BRE Database** folder, create the new business folder (for example, `DEF Manufacturing - BRE Overview`).
2. Right-click **Blank Business Profile – MASTER** (or an existing profile) and choose **Make a copy**. The copy appears as "Copy of...".
3. Right-click the copy, choose **Rename**, and name it (for example, `DEF Manufacturing - Business Profile`).
4. Right-click it again, choose **Organize** → **Move** (in some versions just **Move to**), select the new business folder, and click **Move**.
5. Open the new profile and update the information that doesn't come from visits: business name (B1), description (A3), address, owner, contacts, and the yellow manual cells.
6. If you copied an existing profile instead of the master, select the old visit rows (row 15 and below) and press **Delete** to clear them. **Don't** use Delete row; clearing keeps the formulas pointed at the right place.
7. Enter the business's visit history in the visit log, oldest first, and check that the dashboard fills in.

4b. Link it to the overview

1. With the new profile open, copy its URL from the browser's address bar.
2. Open the **BRE Data Overview**. Select the **entire row** of an existing business (click its row number on the left) and copy it (**Ctrl+C**, or **Cmd+C** on a Mac).
3. Click the row number of the next empty row and paste (**Ctrl+V** / **Cmd+V**). All the formulas copy down, and `$A13` automatically becomes `$A14`, `$A15`, and so on.
4. Paste the new profile's URL into column A of that row, replacing the copied one.
5. Click the **#REF!** cell and choose **Allow access**. The whole row fills in.

That's it: one URL and one click per business.

Step 5: Day-to-day use

- **After every visit or call:** open the business's folder, save any meeting notes, documents, or data requests there, and add a new row to the bottom of the profile's visit log. The profile dashboard and the overview update on their own. The overview can take a minute to refresh.
- **Finding a business:** use the search bar at the top of Google Drive. A consistent folder-naming pattern makes this fast.
- **Sorting and filtering the overview:** click **Data** → **Create a filter**, then use the filter icons in row 12 to sort by industry, wage, space needs, and so on. Because each row's formulas point to its own column A, sorting won't break the links.

- **Archiving a business:** if a business closes or you stop tracking it, create an **Archived Businesses** folder inside the main folder and move its folder there. The history is kept, and the profile link still works. Then delete its row from the overview (right-click the row number → **Delete row**) so it no longer counts toward your totals. If you want to keep its data visible, move the row to a separate **Archived** tab instead.

Adding a new data point later

You can do it, but it has to be done in every profile, so plan ahead when you can. For each profile: add the new column to the **right end** of the visit log, add a label and value cell in the dashboard with the most-recent-entry formula pointed at that column, then add a matching column in the overview with an IMPORTRANGE formula pointing at the new dashboard cell.

Don't insert rows or columns in the profile dashboard area (rows 1–14) after profiles are linked. The overview's cell references are written in quotation marks (like `"F4"`), so they won't move if the profile's layout shifts, and the overview will start pulling the wrong information. Add new things to the right or in empty cells instead.

Troubleshooting

What you see	What it means / how to fix it
#REF! with "You need to connect these sheets"	Click the cell and click Allow access . You only need to do this once for each profile.
#REF! with "You don't have permission" or "spreadsheet not found"	Your account can't open that profile, or the URL in column A is incomplete. Open the profile to confirm you have access, then copy the full URL again from the address bar.
#REF! or "Unable to parse range"	The cell reference must be in straight quotation marks, like "F4". If you copied a formula from a document, retype the quotation marks in Google Sheets.
"Loading..." won't go away	Wait a minute, then refresh the browser. Linked sheets can be slow when many update at once.
Several overview columns show the same value	The quoted cell reference wasn't updated after copying. Check each column against the table in Step 3b.
Overview is pulling the wrong information	Rows or columns were inserted in a profile's dashboard area, so the cells moved. Move the information back to its original cells, or update the quoted references in the overview.
Dashboard shows an older value, not the newest	Visits weren't entered in date order. The formula uses the lowest filled row, so keep the newest visit at the bottom.
Dashboard cell is blank	Nothing has been logged in that visit-log column yet. Or check that the formula's column letter is correct in all four places.
"Circular dependency detected"	The formula's range includes its own cell. Make sure it starts at row 15 (for example, F15:F), not the whole column (F:F).
A date shows as a number, like 46174	Select the cell and click Format → Number → Date .
Totals or averages are 0 or wrong	Numbers were typed with text (5,000 sq ft, \$18/hr). Re-enter them as plain numbers in the profile's visit log.
Industry totals leave some businesses out	Their Business Type is spelled differently ("Mfg" vs "Manufacturing"). Make them match, or use a dropdown.

Shortcut: have AI build it for you

You can paste these instructions into an AI assistant (like Claude, ChatGPT, or Gemini) and ask it to create a Business Profile and BRE Data Overview built to your exact specifications. Edit the bracketed parts, then paste this prompt along with this guide:

I'm an economic development professional building a Business Retention & Expansion (BRE) tracking system in Google Drive using the attached guide.

Please create two Google Sheets layouts for me:

1. A Business Profile sheet with a dashboard at the top and a visit log below (headings in row 14, entries from row 15). The visit log columns should be: [list your columns]. Every dashboard field that comes from the visit log should use this formula pattern so it shows the most recent non-blank entry: `=IFERROR(INDEX(FILTER(X15:X, X15:X<>""), ROWS(FILTER(X15:X, X15:X<>""))), "")`. These fields should be manual instead: [list them].

2. A BRE Data Overview sheet with a dashboard in rows 1–10, headings in row 12, and one business per row starting in row 13. Column A holds each profile's URL, and every other column uses `=IMPORTRANGE($A13, "[cell]")` to pull one dashboard cell from the profile.

Give me a cell-by-cell table for both sheets, every formula ready to paste, and dashboard formulas that calculate: [the totals and averages you want, e.g. average starting wage by industry, total space needs].

Before you rely on anything AI produces, check its formulas and cell references against this guide and test it with a sample business.