

Brief [here](#)

Brief checklist below

Setup & Data Preparation

- ☐ Do not delete any records at all (even if duplicate records as often different records)
- ☐ Confirm Google Sheets API access and sharing permissions.
- ☐ Connect Google Sheets to automation tool (Zapier / Make / Airtable Automations)
- ☐ Set up live data sync so GPT always references the latest sheet.
- ☐ Configure OpenAI / GPT API connection.
- ☐ Test API link between Google Sheets and GPT.
- ☐ Ensure all connected tools remain within £20/month combined cost.

Indexing (also important)

- ☐ When I find contacts using GPT on my phone using the GPT, these must instantly go to a new tab called 'New contacts' with as much info. For context, I often find contacts by 'scraping' on GPT for LinkedIn etc. But I don't want to have to manually add them in to a new tab each time.
- ☐ When I search on GPT, the results must also do a conclusive search searching for the below. See the prompt [here](#).
- ☐ I already have a project called 'Database' in my GPT so would ideally like this all configured together.

Event name	Contact Name	Position	LinkedIn contact	Status	Email	Instagram page	Instagram followers	Club / Promoter / Festival	Active ?	Month (if festival)	Website/R A page	Continent	Country	City
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GPT Query Functionality

- ☐ Build natural-language query input (user can type plain English).
- ☐ Configure GPT to interpret queries and fetch correct dataset.
- ☐ Format GPT responses as a structured table (matching Google Sheets layout).
- ☐ Enable export of results (CSV, Excel, or PDF).
- ☐ Test multiple sample queries for accuracy and reliability.
- ☐ Automate updates so new or edited Google Sheet entries appear in future GPT queries.

- ☐ Eliminate need for manual uploads or re-syncs.
 - ☐ Verify near real-time data reflection between Sheets and GPT.
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Secure Sharing & Permissions

- ☐ Ensure the link can be shared
 - ☐ Restrict shared links to view-only access.
 - ☐ Prevent users from resharing, downloading, or editing source data. They should only be able to download one table per query. This should be unlimited.
 - ☐ Set up tracking to see who has access at any given time.
 - ☐ Add ability to revoke access manually.
 - ☐ Tie permissions to unique, traceable access links.
 - ☐ Test all link-sharing and permission features.
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Optional CRM-Style Features (can consider paying extra for this but let's get the first job done)

- ☐ Create interface (in Airtable or similar) to view individual contact records.
 - Add a notes field for private comments on each record.
 - Ensure notes are visible only to the main user (not shared viewers).
 - Test saving, editing, and deleting notes.
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User Interface & Output

- Design a simple, clear dashboard for entering GPT queries.
 - Display results in a downloadable, well-formatted table.
 - Make sure output layout mirrors Google Sheets' structure.
 - Check responsiveness and readability on desktop and mobile.
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Documentation & Handover

- Write short user guide explaining how the workflow operates.
 - Include instructions for maintaining or updating integrations.
 - Provide list of connected tools and their configuration details.
 - Verify all documentation is clear for non-technical users.
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Testing & Quality Assurance

- Test all core functions: query, data fetch, export, sharing, and sync.
- Simulate updates in Google Sheets to ensure live sync works.
- Confirm access permissions behave as expected.
- Review data accuracy between Sheets and GPT output.
- Confirm workflow cost remains under £20/month.