Automation Title -- Portfolio Contact Form → Gmail Auto Reply + CRM Entry

BY

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Category -- Client Relationship Management (CRM) / Communication Automation

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Detailed Description

This automation converts your portfolio's contact form into a mini client management system that captures messages, tracks communication, and automates responses.

Whenever someone fills out the contact form on your website, the details — including their name, email, subject, message, and timestamp — are automatically saved to a Google Sheet. This serves as your CRM database, allowing you to maintain a history of every conversation.

Immediately after submission, two automated emails are triggered via Gmail:

1. **A personalized "Thank You" email** sent to the sender confirming that their message was received.
2. **A self-notification email** sent to you (the site owner), containing the full message details so you can respond quickly if needed.

This workflow provides instant acknowledgment to the client and ensures you're always aware of new inquiries without having to manually check your inbox or sheets. It improves responsiveness, client confidence, and organization — all automatically.

How It Works (Functionality)

Trigger

- **Portfolio Form Submission:**
  Each time a new form submission is received, the data is captured and passed to Make.com via webhook or linked Google Form.

Actions

1. **Save to Google Sheet (CRM Database):**
   - Form data is logged as a new row containing:
     Name | Email | Subject | Message | Timestamp
   - Each entry keeps message history organized and accessible.
2. **Send Auto Reply to Client (via Gmail):**
   - An immediate "Thank You" email is sent to the person who filled the form.
   - Example:

     Subject: Thanks for reaching out
     Hi [Name],
     Thank you for your message! I'll get back to you shortly.
     — [Your Name]
3. **Send Self Notification Email (via Gmail):**

    - You receive an instant notification with:
        - Sender’s name and email
        - Subject
        - Message body
        - Timestamp
    - This ensures you’re immediately informed of every new contact form submission.

Tools Required

- **Google Forms / Website Contact Form** – For collecting user input.
- **Make.com** – For automating data handling and email sending.
- **Google Sheets** – To act as a CRM log for contact submissions.
- **Gmail** – For sending both auto-replies and self-notifications.

Size of Project

Medium (3 tasks)

- Save to Google Sheet
- Send auto reply to client
- Send self notification to owner

Setup Requirements

1. Create a **Google Sheet** with columns:
    - Name, Email Address, Subject, Message, Timestamp
2. In **Make.com**:
    - Trigger: **Form Submission** (Webhook or Google Forms trigger).
    - Action 1: **Google Sheets → Add Row** to record the details.
    - Action 2: **Gmail → Send Email (Client Auto Reply)**
    - Action 3: **Gmail → Send Email (Self Notification)**
3. Map the fields from the form to both Gmail modules (e.g., client email → “To”, message → “Body”).
4. Test the workflow and activate scheduling.

Deployment Time Estimate

- **Without customization:** ~1 hour
- **With custom email design (HTML templates):** ~2 hours

Value Proposition

This automation offers a full **client communication pipeline** from inquiry to acknowledgment — without manual effort.

- Clients receive instant confirmation, boosting trust.
- You stay informed immediately through self-notifications.
- Every message is logged automatically for tracking.

Estimated savings: 2–3 hours per week
Value generated: Faster responses, higher client conversion rates

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Known Limitations

- Gmail daily sending limit applies (2,000 emails/day for Google Workspace, 500/day for free accounts).
- Ensure sender email is valid to avoid bounce errors.
- Google Sheets size limit (5M cells) for long-term CRM data.

Testimonials/Use Cases

- Freelancers using this to streamline inquiries on their portfolios.
- Small agencies turning contact forms into client databases.
- Creatives and developers improving client response times with auto-replies.

Size Classification

Medium Automation (3–6 tasks)

Estimated ROI

Formula: (Hours saved × Hourly rate) – Subscription cost
= (10 hours/month × $25/hr) – $0 (Google + Make Free Tier)
= **$250/month ROI**

Version & Updates

- **v1.0** – Contact form → Save to Sheet → Send auto reply + self notification
- **v1.1 (Planned)** – Include Slack notification or CRM sync (e.g., Airtable)
- **v1.2 (Future)** – Add AI summary of messages in the sheet for quick insights