



One quote follow-up draft: Google Sheets → Gmail drafts

A free Make.com template. Once a day it reads your quotes list, finds quotes sent **7 to 13 days ago** with no reply marked, and puts **one follow-up draft** in your Gmail Drafts folder. It **never sends email**. You read, edit and send each draft yourself.

What it does

- Reads the **Quotes** tab (columns A–G) once a day.
- Makes a draft only when **Replied** is not ticked, **Draft Created** is empty, **Client Email** is filled in and **Sent Date** is 7–13 days ago.
- Writes today's date into Draft Created, so a quote never gets a second draft.
- Older quotes are never drafted, so the first run is safe.

In the download

- **Flowpaja_Quote_FollowUp_Draft_FREE_blueprint.json**: the Make scenario (3 modules, no connections or account IDs inside).
- **Quote_FollowUp_Draft_EXAMPLE_sheet.xlsx**: 6 fictional quotes.
- **Quotes_tab.csv**: the same rows as CSV.
- **README.txt** and this guide.

You need a Make.com account (the Free plan works) and a Google account with Sheets and Gmail.

The sheet (tab "Quotes", row 1 = headers)

A Quote ID	B Client Name	C Client Email	D Project	E Sent Date	F Replied	G Draft Created
Q-1041	Lena Example	lena@example.com	Website copy, 5 pages	12 days ago	☐	→ today's date
Q-1042	Omar Sample	omar@example.org	Monthly social calendar	10 days ago	☒	skipped: replied
Q-1043	Test Garden Co.	hello@example.net	Logo refresh	1 day ago	☐	skipped: too new
Q-1046	(empty)	studio@example.com	Photo shoot	8 days ago	☐	→ draft says "Hi there"

Sent Date must be **shown as yyyy-mm-dd** (Format > Number > Custom date and time). The sample dates are formulas (=TODAY()-12) so the test works on any day.

What the draft looks like

To: lena@example.com · Subject: Following up on quote Q-1041: Website copy, 5 pages · in Drafts, not sent

Hi Lena Example,

I'm following up on the quote I sent on 2026-09-23 for Website copy, 5 pages (ref Q-1041). Do you have any questions, or would it help to adjust the scope?

Thanks,
[Your name]

From a real Run once in Make on 2 Oct 2026 with fictional data: 3 drafts, 7 credits. A second run made no new drafts.

Limits (please read)

- **It doesn't read your inbox**. Tick Replied when a client answers. Typing anything in Draft Created also skips a quote.
- **Skipped without an error**: a Sent Date in another format (e.g. 24/09/2026) or empty, an empty Client Email.
- **Credits**: 1 per daily run, plus 2 per draft (draft + sheet update). Reads up to 200 rows.
- **Gmail**: personal Gmail connections need re-authorizing about every 6 months. "7–13 days ago" uses your Make time zone.



● Set it up in 7 steps

- 1 Make your sheet.** Google Sheets > Blank spreadsheet > File > Import > Upload > choose `Quote_FollowUp_Draft_EXAMPLE_sheet.xlsx` > Replace spreadsheet. Then select F2:F200 > Insert > Checkbox. Keep the tab name `Quotes`.
- 2 Import the blueprint.** In Make: Scenarios > Create a new scenario > ... (More) at the bottom > Import Blueprint > choose `Flowpaja_Quote_FollowUp_Draft_FREE_blueprint.json` > Save.
- 3 Module 1 (Google Sheets):** add your Google connection, select your spreadsheet, choose the sheet `Quotes`. Leave "Value render option" on **Formatted value**. Click OK.
- 4 Module 2 (Gmail):** click Add and create a **new Gmail connection from this module** (Sign in with Google, allow all requested access). Edit the Subject and the text, and replace `[Your name]`. Click OK.
- 5 Module 3 (Google Sheets):** choose the same Google connection. Spreadsheet, sheet and row are already mapped. Click OK and save.
- 6 Test:** click **Run once**. With the example rows you get **2 drafts** (Q-1041 and Q-1046 "Hi there") and today's date in Draft Created on those rows. Check Gmail > Drafts: nothing is in Sent. Delete the test drafts.
- 7 Schedule it daily.** Clock icon > Every day > 09:00 (mid-morning, not near midnight) > OK > Save > switch the scenario ON. Delete the sample rows and add your own quotes.

Don't leave the schedule at "Every 15 minutes". It would still make only one draft per quote, but it would use about 96 credits a day for the checks. Once a day is enough.

● If something goes wrong

"Insufficient authentication scopes"	The Gmail connection was made for sending only. In module 2 click Add and create a new Gmail connection from the draft module.
0 drafts, but a quote should get one	Check: Sent Date shown as yyyy-mm-dd and 7-13 days ago, Replied unticked, Draft Created truly empty, Client Email filled in. Open the run's filter (the dotted line) to see which condition failed.
Dates show as numbers	Module 1 "Value render option" was changed. Set it back to Formatted value.
A quote got two drafts	The sheet update (module 3) failed after the draft was made, or the same quote is on two rows. Fix the error, delete the extra draft.
"Failed to verify connection" / 7-day expiry	Reauthorize it in Make > Connections. Weekly expiry only happens with your own Google Cloud OAuth app left in "Testing" status.
Scenario switched off by itself	Make switches a scenario off after repeated errors. Open the History tab, fix the cause, switch it on again.

Want a full follow-up sequence? Quote Follow-Up Assistant (\$19) makes drafts on day 3, 7 and 14 (you choose the days and texts), with a Status column (Open, Replied, Won, Closed, Paused), one draft at a time, a note per quote and error handling. It never sends by itself either.
flowpaja.gumroad.com/l/quote-follow-up-make-template · all 3 templates: \$39 bundle on flowpaja.com/templates

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