

Google Sheets job tracker: freeze, drop-downs, SUMIF, colour rules and filter views on one page

The steps from the free Google Workspace for Work course, practised there on real Google Sheets screens (free Google account).

Set up the sheet

1. Type **sheets.new** in the address bar, click the title and rename it.
2. Headers in row 1, one job per row: Date, Client, Crew, Status, Amount.
3. Click row 1, then **View > Freeze > 1 row**.

Status drop-down

1. Type **D2:D100** in the Name box and press Enter.
2. **Data > Data validation > Add rule**. Criteria is already **Dropdown**.
3. Select the "Option 1" text before typing, add **Booked**, **Done**, **Invoiced**, **Paid**, then **Done**.

Totals and colours

SUMIF

`=SUMIF($D$2:$D$100, G2, $E$2:$E$100)` next to each status label, copied down.

Highlight a row

Select A2:E100, **Format > Conditional formatting > Custom formula is** `=D2="Done"`, yellow fill.

Total shows 0?

Check the spelling matches the drop-down and Amount holds numbers, not "\$" text.

Views and sharing

- **Data > Create filter view**: only changes what you see. Filter Crew, then **Save view** with a name.
- **Share**: add people by email as Editor or Viewer.
- Keep **General access** on **Restricted**. "Anyone with the link" means anyone who gets the link.
- Made a mistake? **File > Version history** restores an earlier version.

Remember: Pick values from a drop-down, let formulas do the totals, and share with named people, never with anyone who has the link.

Practice it free: Google Sheets: Build a Job Tracker That Totals Itself at learn.ynteractive.com/modules/google-sheets-job-tracker. This sheet: learn.ynteractive.com/content/cheat-sheets/google-sheets-job-tracker. Maria's cleaning company is a made-up business from the lesson. By Robert Breen, October 23, 2026.