

1 fact,
one place

products, stock, orders
and invoices in one
workbook you build



Build Your Own Spreadsheet System

A hands-on **Google Sheets** workbook for small
businesses and online sellers

Every formula tested in Google Sheets

Build Your Own Spreadsheet System

A Step-by-Step Google Sheets Workbook for Tracking Products, Stock, Orders and Invoices, No Coding Required

Build Your Own series · Book 2 · First edition, 2026 · **Free sample: Chapters 0 and 1**

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Disclaimer: The formulas in this book were tested in Google Sheets in October 2026; the look of the menus may change. The **Invoices** tab makes pro forma invoices, not tax invoices. This book is not legal, tax, accounting or financial advice.

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0 · Before you start

By the end of this chapter: You will know what this book has you build, what it won't do for you, and what to have ready before Chapter 1.

Time: 10 minutes.

What this book has you do

This book doesn't teach you every function in a spreadsheet program. It has you build one thing: a workbook that tracks your products, your stock, your orders and your invoices, and shows you the week's numbers on one tab.

1. You will list everything you keep track of today and decide where each piece belongs (Chapter 1).
2. You will build a **Products** tab: one row for each product you sell (Chapter 2).
3. You will build a **Stock movements** tab that works out your current stock for you (Chapter 3).
4. You will build **Orders** and **Customers** tabs that look up prices and names instead of retyping them (Chapter 4).
5. You will build an **Invoices** tab that fills itself in from an order number (Chapter 5).
6. You will build a **Dashboard** tab that shows sales, open orders and low stock at a glance (Chapter 6).
7. You will protect the workbook, share it safely, and learn to spot the day it is no longer enough (Chapter 7).

You won't write code, macros or scripts. Every formula in the book is shown in full, and you type it exactly as it is printed.

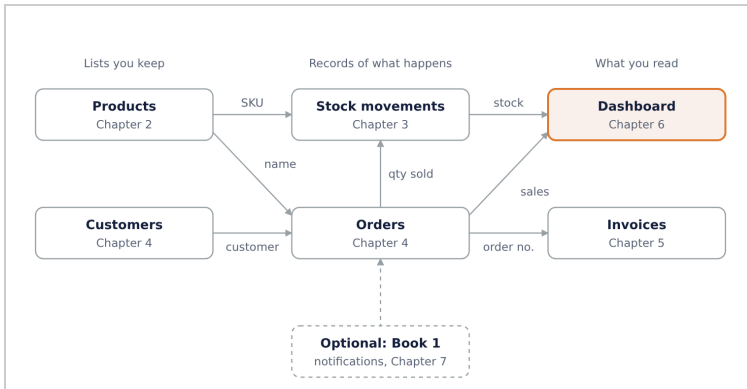


Figure 0.1 · The workbook you will have at the end of the book. The two lists on the left feed the records in the middle; the tabs on the right only read them.

What you will have when you finish, and what you won't

You will have:

- One workbook with six tabs, filled with your own products, stock and orders
- A current stock figure for every product, worked out from what came in and what went out
- A pro forma invoice for any order, filled in from its order number
- A weekly dashboard you can read in two minutes
- A clear idea of where your system will break as you grow, and what to do then

You won't have:

- Accounting software. The workbook keeps track of your business; it doesn't keep your books and doesn't replace your accountant.

- Legal tax invoices. The **Invoices** tab makes pro forma invoices and keeps a record of what you billed. If your country requires e-invoices or invoices from an approved system, keep issuing them there.
- Stock that updates itself across several online stores. If you sell the same product in several places, Chapter 7 tells you when a spreadsheet stops being enough.
- An income guarantee. Knowing your numbers helps you decide; it doesn't promise sales.

Who this book is for, and who it isn't for

This book is for you if:

- You sell products, online or in person, and you are the one who keeps the records
- Your records are spread over notebooks, seller panels, messages and several spreadsheet files
- You work alone or with a small team

The test is this: If you can type into a cell, copy a cell and open a menu, you have enough skills for this book.

This book isn't for you if:

- You already run your stock and orders in dedicated software and are happy with it
- You want to learn spreadsheet functions for their own sake. This book teaches only the ones the workbook needs.

Do you need the first book? No. *Build Your Own Automation* is the first book in this series; it builds workflows that write data into spreadsheets. If you have built one, Chapter 7 shows where its data can go in this workbook. You can read this book on its own.

What you need

What	Why	When
A computer and the Chrome browser	You build the workbook in the browser. A phone is fine for reading it later, not for building it	Every chapter
A Google account	Google Sheets comes with it at no cost	From Chapter 1
Your product list	Names, codes, costs and prices of what you sell	Chapter 2
A count of your shelf, and the orders that come in after it	You learn by entering your own data	Chapters 3 and 4
About an hour per chapter	Reading is quick; building takes time	Every chapter

If you use Excel: The steps in this book are written for Google Sheets. Every formula works in Excel too. Where Excel differs, a short “In Excel” note says so, and Appendix B lists the differences in one place.

How to use this book

- **Go in order.** Each tab uses the ones before it: **Orders** looks up prices in **Products**, and the **Dashboard** reads everything.
- **Use your own data.** Sample data doesn’t teach you what breaks. Enter at least ten real products, and at least twenty real order lines before Chapter 6.
- **Stop at the checkpoints.** Lines marked ☐ tell you whether you are on the right track. If you don’t see what you should see,

don't move on; look at the "If something goes wrong" table next to the step.

- **If a formula shows an error, see Appendix C.** The errors you may run into, and what to do about each, are listed there.
- **Keep the appendices at hand.** The templates are described in Appendix A, the formulas in Appendix B, the checklists in Appendix D, and the glossary and exercise answers in Appendix E.

Conventions in this book

Marker	Meaning
Bold text	A button, menu or tab name written exactly as it appears on screen, for example Products
This typeface	Something you type exactly as shown
☐ Checkpoint	What you should see on your screen before you continue

A note on dates

Every formula in this book was tested in Google Sheets in **October 2026**. Google changes the look of Sheets from time to time. If a menu has moved when you read this, the steps still work; the formulas don't change. Corrections and current screens are here: **skytekpress.com**

This book's approach in one sentence

Write each fact once, and let every other tab look it up. Most spreadsheet trouble starts when the same price, name or stock count is typed in two places and one of them goes out of date. Chapter 1 starts by finding those places.

1 · Map what you track

By the end of this chapter: You will have a list of at least 20 pieces of information you track today, each one assigned to a tab, and an empty workbook with the six tabs named and in order.

Time: One hour.

You need: - Paper and a pen - The places your records live today: notebooks, seller panels, spreadsheet files, messages - A Google account

Remember

1. What does the **Invoices** tab in this book make, and what doesn't it replace?
2. How did we sum up this book's approach in one sentence?

Just enough to know

List: A tab that describes things that exist and rarely change: your products, your customers. One row for each thing.

Record: A tab that writes down something that happened on a date: stock arrived, an order came in. One row for each event. You add new rows; you don't change old ones.

Calculated: Anything you can work out from the lists and the records: your current stock, an order's total, this week's sales. You never type it; a formula works it out.

Key: A short code that names exactly one thing, so another tab can point at it. A product code (SKU), an order number, a customer

number.

Why split it this way? Your current stock is the best example. If you type it in by hand, it is right until the next sale and wrong after it. If you write down what came in and what went out, the current stock is a sum, and a sum is never out of date.

Step by step

1.1 Find where your records live today

1. Take a sheet of paper and write **Where my records live** at the top.
2. Write every place you keep business information, one per line. Think of: notebooks, the seller panels of the marketplaces you sell on, your online store's admin page, spreadsheet files, email folders, messages with suppliers, the notes app on your phone.
3. Next to each place, write who looks at it most often.

☐ **Checkpoint:** Do you have at least four places? Most small businesses have more than they think; the notes app and the message history are the ones people forget.

1.2 List what you track

4. Go through the places one by one. For each place, write down every piece of information you find there, one per line, as a noun: "product name", "cost price", "stock count", "customer phone", "order date", "shipping fee".
5. Write it once for each place it appears. If "stock count" is in a notebook and in two seller panels, write it three times, with the place next to it. You will use the repeats in step 1.4.

6. Keep going until you have at least 20 lines.

How to write them: Write the piece of information, not the document. Not “the order email”, but “order number”, “order date”, “product ordered”, “quantity”, “price paid”.

Not like this	Like this
Supplier invoice	Supplier name, date goods arrived, quantity arrived, cost price
Order email	Order number, order date, product, quantity, price paid
Customer list	Customer name, email, phone, delivery address

☐ **Checkpoint:** Does your list have at least 20 lines, each a single piece of information?

1.3 Give each line a tab

7. For each line, ask the five questions below, in this order. The first question that gets a “yes” gives the line its tab. Write the tab name next to the line.

#	Question	If yes, it goes to
1	Can I work it out from other information on my list?	Calculated: you never type it; a formula shows it
2	Does it describe one product, whatever happens?	Products
3	Does it describe one customer, whatever happens?	Customers
4	Does it happen on a date, again and again?	Stock movements if goods come in or go out without a sale; Orders if it is a sale
5	Is it about billing an order?	Invoices

8. Mark every line that got “Calculated” with a circle. These are the numbers the workbook will work out for you.

Why ask question 1 first? Because the most common mistake is typing a number that could be calculated. “Stock count” and “order total” feel like facts, but each is a sum of other facts. If you type them, you’ll have to retype them every day.

If something goes wrong

What you see	Likely cause	What to do
A line fits two tabs	It is really two pieces of information	Split it: “price” becomes “list price” (Products) and “price paid” (Orders)
“Stock count” landed on Products	Question 1 was skipped	Ask question 1 again: stock is what came in minus what went out, so it is Calculated
A line fits no tab	It isn’t about products, stock, customers, orders or invoices	Leave it out of this workbook. Not everything has to live here

1.4 Keep each fact in one place

- 9. Find the lines you wrote more than once in step 5. For each one, cross out every copy except the one in the tab you chose.
- 10. Look at the lines you kept. For every line that belongs to a product, a customer or an order but sits on another tab, write the key that will link them: **SKU** for a product, **order number** for an order, **customer number** for a customer.

Good to know: price is the exception that isn’t one. A product’s list price belongs to **Products**. The price a customer paid belongs to **Orders**, because it happened on a date: if you raise your prices next month, last month’s orders must still show what was paid. These are two facts, not one fact typed twice.

☐ **Checkpoint:** Does every fact on your list now appear once, apart from keys?

1.5 Draw the tabs on paper

11. Draw six boxes: **Products** and **Customers** on the left, **Stock movements** and **Orders** in the middle, **Dashboard** and **Invoices** on the right.
12. Draw an arrow from each tab to every tab that needs something from it, and write the key on the arrow. For example, an arrow from **Products** to **Orders** labelled “SKU”.
13. Compare your drawing with Figure 0.1 in Chapter 0.

□ **Checkpoint:** Does no arrow start at **Dashboard** or **Invoices**?

These two tabs only read. If an arrow starts at one of them, something that should be calculated is being typed; go back to step 1.3.

1.6 Create the workbook

14. In Chrome, type `sheets.new` in the address bar and press Enter. A new, empty spreadsheet opens.
15. Click **Untitled spreadsheet**, type `Business Workbook` and press Enter.
16. Right-click the **Sheet1** tab, click **Rename**, type `Products` and press Enter.
17. Click **Add Sheet** (the + button next to the tabs) five times. Five new tabs appear.
18. Rename the five new tabs, from left to right: `Stock movements`, `Orders`, `Customers`, `Invoices`, `Dashboard`.

□ **Checkpoint:** Do you see six tabs, in this order: **Products**, **Stock movements**, **Orders**, **Customers**, **Invoices**, **Dashboard**?

If something goes wrong

What you see	Likely cause	What to do
A Tables panel opens next to the sheet	Google Sheets suggests its table feature in new files	Close the panel. This book doesn't use it
The tabs are in the wrong order	They were renamed out of order	Drag a tab sideways to move it
The file appeared in a different Google account	Chrome was signed in to another account	Open the account picture, choose the right account, and repeat step 14
"A sheet with this name already exists"	Two tabs were given the same name	Rename the second one correctly

In Excel: The steps are the same: + adds a sheet, and right-clicking a tab shows **Rename**. Save the file as `Business Workbook.xlsx`.

Now you try

Here is the record list of a small online candle shop (a made-up example). Give each line a tab, or mark it “Calculated”. Answers are in Appendix E.

Line	Tab
Candle name	
Wax cost per candle	
Number of candles in stock	
Date a box of jars arrived	
Number of jars that arrived	
Customer email	
Order number	
Price the customer paid	
Order total	
Invoice number	

Which line did you want to put on a tab before you asked question 1?

Apply it to your business

Copy ten lines from your list here: the ones you look at most often.

Piece of information	Where it lives today	Tab (or "Calculated")	Key it uses

How many of your ten lines did you mark "Calculated"? ____ Each one is a number you will never type again.

Real example: one product, eight stock numbers

Skytek sells on eight online marketplaces. Each marketplace has its own seller panel, and each panel keeps its own stock number for the same product. Some of the panels update each other; the others don't. On a list like the one in step 1.2, one product's stock count would appear at least eight times.

So we don't keep the stock count in any of the eight panels. We keep it in a stock panel we built ourselves: one place, one number. The **Stock movements** tab you build in Chapter 3 does the same job in a spreadsheet.

How many times does your stock count appear on your list?

Checklist

- ☐ I wrote down every place my records live
- ☐ My list has at least 20 lines, each a single piece of information
- ☐ Every line has a tab or is marked "Calculated"
- ☐ Every fact appears once, apart from keys
- ☐ I drew the six tabs and their keys on paper
- ☐ The workbook has six tabs in the right order

Test yourself

1. Why is "current stock" marked "Calculated" and not given a column on **Products**?
2. A customer's delivery address: which tab, and which question decides it?
3. Why does the price a customer paid belong to **Orders** and not only to **Products**?
4. What is a key, and which key links **Orders** to **Products**?

Answers are in Appendix E.

The rest of the book

You have read the first two chapters. The full book builds the workbook tab by tab:

2 · Products	SKUs, dropdowns, margin
3 · Stock movements	Opening count, current stock, reorder points
4 · Orders and customers	Order lines, XLOOKUP, cancellations and returns
5 · Invoices	A pro forma invoice filled from the order
6 · The weekly dashboard	One date, the whole week
7 · Keep it working	Protection, sharing, backups, the monthly count
Appendices	Workbook map, formula guide, error catalogue, checklists, glossary and answers

The answers to the exercises in Chapter 1 are in Appendix E of the full book.

Complete Kit: the e-book (PDF) and the ready-made Business Workbook (Excel, also opens in Google Sheets), with sample data and empty. **skytekpress.com**