

Anwar Sales Ecosystem - Comprehensive Documentation

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System Overview

The **Anwar Sales Ecosystem** is a comprehensive Google Apps Script-based CRM and workflow management system designed for construction material supply chain operations. It manages the entire customer journey from lead generation to order fulfillment, covering:

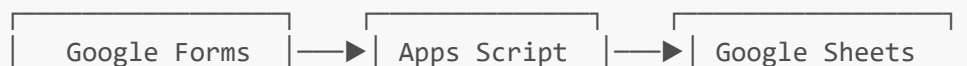
- **Customer Registration & Management** (Engineers, Retailers, Partners)
- **Site & Project Management** (Potential Sites, Site Prescriptions)
- **Order Processing & Fulfillment** (Orders, Disputes, Tracking)
- **Operational Workflows** (Visits, Updates, Approvals)
- **Business Operations** (Retailer Points, Demand Generation)
- **Automated Notifications** (WhatsApp integration)

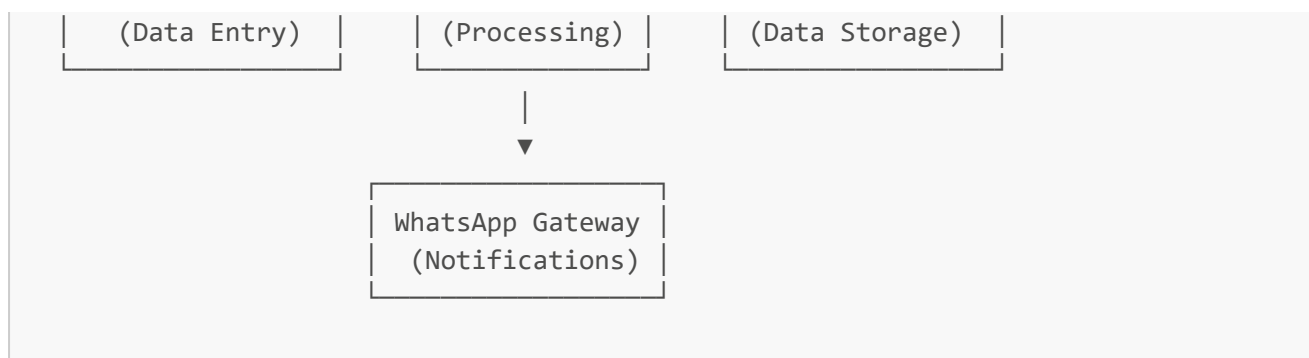
Key Business Benefits

- ☒ **Streamlined Operations:** Automated workflows reduce manual intervention
 - ☒ **Real-time Notifications:** WhatsApp integration ensures instant communication
 - ☒ **Territory-based Management:** Role-based assignment and routing
 - ☒ **Comprehensive Tracking:** End-to-end visibility of all operations
 - ☒ **Scalable Architecture:** Modular design supports growth
-

Architecture

System Architecture





Technology Stack

- **Backend:** Google Apps Script (JavaScript)
- **Data Storage:** Google Sheets
- **Forms:** Google Forms
- **Notifications:** WhatsApp API integration
- **Triggers:** Time-based and event-based automation

Modular Design

The system follows a modular architecture with separate JavaScript files for each business domain:

```
AnwarSalesEcosystem/  
├─ config.js           # Configuration & Constants  
├─ triggers.js        # Event Handling & Routing  
├─ setup.js           # System Setup & Form Creation  
├─ sheets.js          # Data Layer & Sheet Operations  
├─ notifications.js   # WhatsApp & Communication  
├─ validation.js      # Data Validation & Business Rules  
├─ admin.js           # Administrative Functions  
├─ crm.js              # CRM Operations & Approvals  
├─  
├─ Core Business Modules:  
├─ engineer.js        # Engineer Registration & Management  
├─ retailer.js         # Retailer Operations  
├─ partner.js         # Partner & Contractor Management  
├─ potential-site.js  # Site Registration & Approval  
├─ order.js           # Order Processing & Disputes  
├─ visit.js           # Customer Visits & Updates  
├─ site-prescription.js # Site Prescriptions & Recommendations  
├─ ihb.js             # IHB (Independent House Builder) Management  
├─ retailer-point.js   # Retailer Point Requests  
├─ demand-generation.js # Demand Generation Requests  
├─  
├─ Testing Modules:  
├─ test-visit.js  
├─ test-triggers.js  
├─ test-order-dispute.js  
├─ test-retailer-point-asm.js  
└─ test-demand-generation.js
```

Core JavaScript Files

1. **config.js** - System Configuration

Purpose: Central configuration management for the entire system.

Key Functions:

- **CONFIG** - Main configuration object containing:
 - **SPREADSHEET_IDS**: All Google Sheets IDs for data storage
 - **FORMS**: Form configurations with fields and validation
 - **SHEET_NAMES**: Standardized sheet naming conventions
 - **SCHEMAS**: Data structures for each entity type
 - **TRIGGERS**: Event handler mapping

Business Logic:

- **Centralized Configuration**: Single source of truth for system settings
- **Form Definitions**: Standardized form structures across all modules
- **Data Schema Management**: Consistent data structure across sheets

Use Cases:

- System initialization and setup
- Form creation and validation
- Data structure consistency
- Multi-environment configuration management

2. **triggers.js** - Event Handling & Routing

Purpose: Central event routing system for form submissions and sheet edits.

Key Functions:

- **onFormSubmitTrigger(e)**: Routes form submissions to appropriate handlers
- **onEditTrigger(e)**: Handles sheet edit events for approvals
- **createTriggers()**: Sets up all system triggers with auto-cleanup
- **createAllTriggersMenu()**: Admin interface for trigger management

Business Logic:

- **Event Routing**: Automatically routes events to correct business modules
- **Trigger Management**: Prevents duplicate triggers, ensures clean setup
- **Error Handling**: Robust error handling with detailed logging

User Journey Integration:

- Form submissions trigger business workflows

- Sheet edits trigger approval processes
 - Background processes handle notifications
-

3. **setup.js** - System Setup & Form Creation

Purpose: Complete system setup and form creation automation.

Key Functions:

- `setupProject()`: Complete system initialization
- `createFormWithConfig()`: Automated Google Form creation
- `createAllForms()`: Bulk form creation for all modules
- `setupRetailerPointRequestForm()`: Specific form setup functions
- `setupDemandGenerationRequestForm()`: Demand generation form setup

Business Logic:

- **Automated Setup:** Zero-configuration system deployment
- **Form Generation:** Dynamic form creation from configuration
- **Validation Integration:** Built-in validation and error checking

Admin User Stories:

- As an admin, I want to set up the entire system with one click
 - As an admin, I want to create all forms automatically
 - As an admin, I want to ensure all triggers are properly configured
-

4. **sheets.js** - Data Layer & Sheet Operations

Purpose: Secure and reliable data operations for Google Sheets.

Key Functions:

- `getOrCreateSheetSafe()`: Safe sheet creation with error handling
- `appendRow()`: Secure data insertion with validation
- `findRow()`: Data lookup and search operations
- `updateRow()`: Safe data updates with concurrency control

Business Logic:

- **Data Integrity:** Ensures data consistency and validation
- **Error Recovery:** Handles sheet access failures gracefully
- **Performance Optimization:** Efficient data operations

Technical Features:

- Atomic operations for data consistency
 - Automatic sheet creation with proper schemas
 - Comprehensive error handling and logging
-

5. notifications.js - Communication System

Purpose: WhatsApp and communication management across all modules.

Key Functions:

- `sendWhatsAppMessage()`: Core WhatsApp messaging functionality
- `findEmployeeByEmail()`: Employee lookup for notifications
- `findEmployeesByRole()`: Role-based employee filtering
- `formatNotificationMessage()`: Message templating and formatting

Business Logic:

- **Role-based Routing:** Messages sent to appropriate personnel
- **Template Management:** Consistent message formatting
- **Fallback Mechanisms:** Ensures critical notifications are delivered

Communication Patterns:

- **Instant Notifications:** Real-time updates for urgent matters
- **Approval Workflows:** Status change notifications
- **Error Alerts:** System issue notifications

Business Logic & Workflows

1. Engineer Registration Workflow (`engineer.js`)

Process Flow:

```
Engineer Submits Form → Data Validation → CRM Storage →  
Admin Notification → Manual Approval → WhatsApp Confirmation
```

Key Functions:

- `handleEngineerFormSubmit(e)`: Main form submission handler
- `handleEngineerApprovalsEdit(e)`: Approval workflow management

Business Rules:

- Engineers must provide complete contact information
- NID documentation required for verification
- Territory-based assignment for management
- WhatsApp notifications for status updates

User Stories:

- **As an Engineer**, I want to register in the system to receive project notifications

- **As a BDO**, I want to approve engineer registrations to expand our network
 - **As an Admin**, I want to track all registered engineers by territory
-

2. Potential Site Management (potential-site.js)

Process Flow:

Site Registration → Location Validation → BDO Review →
Approval/Rejection → Project Creation → Customer Notification

Key Functions:

- `handlePotentialSiteFormSubmit(e)`: Site registration processing
- `handlePotentialSiteApprovalsEdit(e)`: Approval workflow
- `createProjectFromApprovedSite()`: Automatic project creation
- `handlePotentialSiteUpdateFormSubmit(e)`: Site information updates

Business Rules:

- GPS coordinates required for location accuracy
- BDO approval required before project creation
- Automatic project ID generation (P.S-XXX format)
- Territory-based BDO assignment

User Stories:

- **As a Customer**, I want to register my construction site to get services
 - **As a BDO**, I want to approve valid sites to expand our coverage area
 - **As an Engineer**, I want to receive notifications about approved sites in my territory
-

3. Order Processing System (order.js)

Process Flow:

Order Submission → Site Validation → Territory Assignment →
Engineer/Partner Routing → Dispute Management → Fulfillment Tracking

Key Functions:

- `handleOrderFormSubmit(e)`: Main order processing
- `sendOrderNotifications()`: Multi-party notification system
- `sendDisputeNotifications()`: Dispute escalation management
- `createDisputeNotificationMessage()`: Dispute communication templates

Business Rules:

- Orders must reference approved potential sites
- Automatic engineer/partner assignment based on requirements
- Dispute notifications for unmet requirements (Engineer/Partner)
- BDO/CRO escalation for dispute resolution

Advanced Features:

- **Smart Routing:** Orders automatically assigned to appropriate personnel
- **Dispute Management:** Automatic escalation when requirements not met
- **Status Tracking:** Real-time order status updates

User Stories:

- **As a Customer,** I want to place orders for construction materials easily
- **As an Engineer,** I want to receive order notifications for my assigned sites
- **As a BDO,** I want to handle disputes when engineers are not available

4. Visit Management System (`visit.js`)

Process Flow:

Visit Scheduling → Customer Notification → Visit Execution → Status Updates → Follow-up Actions → Progress Tracking

Key Functions:

- `handleVisitFormSubmit(e)`: Visit scheduling and processing
- `sendVisitNotification()`: Customer and team notifications
- `handleVisitUpdateFormSubmit(e)`: Visit status and progress updates
- `sendVisitUpdateNotification()`: Status change communications

Business Rules:

- GPS coordinates captured for visit verification
- Photo documentation required for visit proof
- Automatic follow-up scheduling based on visit outcomes
- Customer satisfaction tracking

Visit Types:

- **Initial Site Survey:** First customer contact and site assessment
- **Follow-up Visits:** Progress monitoring and relationship building
- **Technical Consultation:** Engineering and technical support
- **Problem Resolution:** Issue investigation and solutions

5. Retailer Point System (`retailer-point.js`)

Process Flow:

BDO/CRO Request → ASM Notification → Territory Validation → Approval/Rejection → Point Assignment → Performance Tracking

Key Functions:

- `handleRetailerPointFormSubmit(e)`: Point request processing
- `sendRetailerPointNotifications()`: ASM notification system
- `sendFallbackASMNotification()`: Fallback notification for unassigned territories
- `handleRetailerPointRequestsEdit(e)`: Approval workflow management

Business Rules:

- Only BDO/CRO can request retailer points
- ASM approval required for point assignment
- Territory-based ASM routing with fallback mechanisms
- Performance tracking and reporting

User Stories:

- **As a BDO**, I want to request retailer points to expand our retail network
- **As an ASM**, I want to approve retailer point requests in my territory
- **As a CRO**, I want to track retailer point performance across regions

6. Demand Generation System (`demand-generation.js`)

Process Flow:

ASM Submission → BD Incharge Notification → Market Analysis → Approval/Rejection → Implementation Guidance → Progress Monitoring

Key Functions:

- `handleDemandGenerationFormSubmit(e)`: Request processing
- `sendDemandGenerationNotifications()`: BD Incharge notification
- `findBDInchargeByTerritoryAndBusinessUnit()`: Smart routing logic
- `approveDemandGenerationRequest()`: Approval workflow

Business Rules:

- ASM-only submission rights
- Territory and business unit-based BD Incharge assignment
- Market viability assessment required
- Implementation tracking and monitoring

Strategic Features:

- **Market Intelligence:** Territory-based demand analysis
 - **Resource Planning:** Strategic resource allocation
 - **Performance Metrics:** Demand generation effectiveness tracking
-

User Journeys

1. Customer Journey: From Inquiry to Order Fulfillment

Stage 1: Discovery & Registration

Customer Contact → Site Registration → Location Verification →
BDO Approval → Project Creation → Welcome Communication

Touchpoints:

- Initial contact through referral or marketing
- Site registration via Google Form
- GPS location capture for accuracy
- BDO verification and approval
- Automatic project ID generation
- WhatsApp welcome message with project details

Stage 2: Service Engagement

Visit Scheduling → Site Survey → Prescription Generation →
Technical Consultation → Order Placement → Fulfillment

Touchpoints:

- Engineer visit scheduling
- On-site technical assessment
- Material prescription and recommendations
- Order submission through dedicated forms
- Engineer/partner assignment
- Order tracking and updates

Stage 3: Ongoing Relationship

Follow-up Visits → Additional Orders → Feedback Collection →
Referral Generation → Long-term Partnership

2. Engineer Journey: Registration to Service Delivery

Stage 1: Registration & Onboarding

Registration Application → Document Verification → Territory Assignment → Approval → System Access → Training & Orientation

Stage 2: Daily Operations

Order Notifications → Visit Scheduling → Site Assessment → Service Delivery → Status Reporting → Customer Follow-up

Stage 3: Performance & Growth

Performance Tracking → Feedback Integration → Territory Expansion → Leadership Opportunities → Partner Development

3. BDO Journey: Territory Management

Stage 1: Site Development

Lead Generation → Site Evaluation → Approval Decisions → Territory Expansion → Team Coordination

Stage 2: Operations Management

Engineer Coordination → Order Oversight → Dispute Resolution → Performance Monitoring → Strategic Planning

Stage 3: Business Growth

Retailer Network Development → Demand Generation → Market Analysis → Team Development → Goal Achievement

User Stories

Engineer User Stories

Registration & Setup

- As an **Engineer**, I want to register in the system easily so that I can receive project assignments
- As an **Engineer**, I want to upload my NID documents securely for verification
- As an **Engineer**, I want to specify my service areas so I receive relevant assignments

Daily Operations

- As an **Engineer**, I want to receive WhatsApp notifications for new orders in my territory
- As an **Engineer**, I want to update my availability status to manage my workload
- As an **Engineer**, I want to submit visit reports with photos for documentation

Customer Service

- As an **Engineer**, I want to access customer site information before visits
- As an **Engineer**, I want to create site prescriptions with material recommendations
- As an **Engineer**, I want to escalate complex technical issues to specialists

Customer User Stories

Site Registration

- As a **Customer**, I want to register my construction site easily through a simple form
- As a **Customer**, I want to receive confirmation when my site is approved
- As a **Customer**, I want to track the status of my site registration

Service Requests

- As a **Customer**, I want to request engineer visits for site consultation
- As a **Customer**, I want to receive advance notice of scheduled visits
- As a **Customer**, I want to place orders for construction materials easily

Order Management

- As a **Customer**, I want to track my order status in real-time
- As a **Customer**, I want to receive notifications about order updates
- As a **Customer**, I want to report issues or request changes to my orders

BDO (Business Development Officer) User Stories

Territory Management

- As a **BDO**, I want to review and approve potential site registrations in my territory
- As a **BDO**, I want to assign engineers to customer sites based on availability and expertise
- As a **BDO**, I want to monitor territory performance and growth metrics

Team Coordination

- As a **BDO**, I want to manage engineer assignments and workload distribution
- As a **BDO**, I want to handle order disputes when engineers are unavailable
- As a **BDO**, I want to request retailer points to expand our network

Performance Monitoring

- As a **BDO**, I want to track customer satisfaction and service quality
- As a **BDO**, I want to generate reports on territory performance
- As a **BDO**, I want to identify opportunities for business growth

ASM (Area Sales Manager) User Stories

Retailer Network Management

- As an **ASM**, I want to approve retailer point requests from BDOs and CROs
- As an **ASM**, I want to monitor retailer performance in my area
- As an **ASM**, I want to coordinate with multiple BDOs for territory coverage

Demand Generation

- As an **ASM**, I want to submit demand generation requests for new markets
- As an **ASM**, I want to receive feedback on my demand generation proposals
- As an **ASM**, I want to track the success of implemented demand generation strategies

BD Incharge User Stories

Strategic Planning

- As a **BD Incharge**, I want to review demand generation requests from ASMs
- As a **BD Incharge**, I want to assess market viability and resource requirements
- As a **BD Incharge**, I want to approve or reject requests with detailed feedback

Business Development

- As a **BD Incharge**, I want to guide ASMs on effective demand generation strategies
- As a **BD Incharge**, I want to coordinate with other BD Incharge for regional planning
- As a **BD Incharge**, I want to monitor the success of approved demand generation initiatives

Admin User Stories

System Management

- As an **Admin**, I want to set up the entire system with minimal configuration
- As an **Admin**, I want to create all necessary forms and triggers automatically
- As an **Admin**, I want to monitor system health and performance

User Management

- As an **Admin**, I want to manage user roles and permissions
- As an **Admin**, I want to track system usage and identify bottlenecks
- As an **Admin**, I want to backup and restore system data safely

Maintenance & Support

- As an **Admin**, I want to update system configurations without downtime

- As an **Admin**, I want to troubleshoot issues and provide user support
- As an **Admin**, I want to ensure data security and privacy compliance

API Reference

Core Configuration Functions

CONFIG

Type: Object

Description: Central configuration object containing all system settings.

```
CONFIG = {  
  SPREADSHEET_IDS: { /* All Google Sheets IDs */ },  
  FORMS: { /* Form configurations */ },  
  SHEET_NAMES: { /* Sheet naming conventions */ },  
  SCHEMAS: { /* Data structures */ },  
  TRIGGERS: { /* Event handlers */ }  
}
```

Trigger Management Functions

onFormSubmitTrigger(e)

Parameters:

- **e** (Object): Google Apps Script form submission event object

Returns: void

Description: Central router for all form submissions. Automatically routes to appropriate business module handlers.

Example:

```
// Automatically called by Google Apps Script  
// Routes to handleOrderFormSubmit(), handleVisitFormSubmit(), etc.
```

createTriggers()

Returns: void

Description: Creates all system triggers with automatic cleanup of existing triggers.

Features:

- Deletes all existing triggers first
- Creates fresh triggers for all configured forms

- Skips unconfigured forms with warnings
- Comprehensive error handling and logging

Data Layer Functions

`getOrCreateSheetSafe(spreadsheetId, sheetName, schema)`

Parameters:

- `spreadsheetId` (string): Google Sheets ID
- `sheetName` (string): Name of the sheet
- `schema` (Array): Column schema for sheet creation

Returns: Sheet object

Description: Safely creates or retrieves a sheet with proper error handling.

`appendRow(sheet, data)`

Parameters:

- `sheet` (Sheet): Target sheet object
- `data` (Array): Data array to append

Returns: Range object

Description: Safely appends data to sheet with validation.

Notification Functions

`sendWhatsAppMessage(phoneNumber, message)`

Parameters:

- `phoneNumber` (string): Recipient's WhatsApp number
- `message` (string): Message content

Returns: boolean

Description: Sends WhatsApp message with error handling and retry logic.

`findEmployeeByEmail(email)`

Parameters:

- `email` (string): Employee email address

Returns: Object|null

Description: Finds employee record by email with role and territory information.

Business Module Functions

Order Processing

`handleOrderFormSubmit(e)`

Parameters:

- `e` (Object): Form submission event

Returns: void

Description: Processes customer orders with automatic routing and notifications.

Workflow:

1. Validates potential site ID
2. Generates unique order ID
3. Assigns engineer/partner based on requirements
4. Sends notifications to all parties
5. Creates dispute notifications if requirements not met

`sendDisputeNotifications(orderData, potentialSiteInfo, submitterEmployee)`

Parameters:

- `orderData` (Object): Order information
- `potentialSiteInfo` (Object): Site details
- `submitterEmployee` (Object): Customer information

Returns: void

Description: Handles dispute notifications when engineer/partner requirements are not met.

Visit Management

`handleVisitFormSubmit(e)`

Parameters:

- `e` (Object): Form submission event

Returns: void

Description: Processes visit scheduling with customer notifications.

`sendVisitNotification(visitData)`

Parameters:

- `visitData` (Object): Visit details and scheduling information

Returns: void

Description: Sends visit confirmations to customers and team members.

Setup Functions

setupProject()

Returns: void

Description: Complete system initialization including sheets, forms, and triggers.

createFormWithConfig(formKey, formConfig, folder)

Parameters:

- **formKey** (string): Configuration key for the form
- **formConfig** (Object): Form configuration object
- **folder** (Folder): Google Drive folder for form storage

Returns: Object with form and spreadsheet references

Description: Creates Google Form based on configuration with automatic spreadsheet linking.

Setup & Deployment

Prerequisites

- Google Account with Google Apps Script access
- Google Drive storage for forms and sheets
- WhatsApp Business API access (for notifications)

Quick Setup

1. Create New Apps Script Project

```
// In Google Apps Script Editor  
// Copy all .js files to the project
```

2. Run Initial Setup

```
setupProject(); // Creates all required sheets and configurations
```

3. Create Forms

```
createAllForms(); // Generates all Google Forms
```

4. Setup Triggers

```
createAllTriggersMenu(); // Creates all event triggers
```

Configuration Steps

1. Update Spreadsheet IDs in config.js

```
CONFIG.SPREADSHEET_IDS = {  
  CRM: 'your-crm-spreadsheet-id',  
  // Update other IDs as forms are created  
};
```

2. Configure WhatsApp Integration

```
// Update notification.js with your WhatsApp API credentials
```

3. Test System

```
runAllTests(); // Comprehensive system testing
```

Production Deployment

1. Environment Configuration

- Set up production Google Sheets
- Configure WhatsApp API endpoints
- Update configuration constants

2. Security Setup

- Configure access permissions
- Set up data backup procedures
- Implement error monitoring

3. Performance Optimization

- Enable trigger batching
- Configure caching where appropriate
- Set up monitoring dashboards

Testing

Test Coverage

The system includes comprehensive test suites for all major components:

Core System Tests

- `test-triggers.js`: Trigger creation and management
- `test-visit.js`: Visit workflow and notifications
- `test-order-dispute.js`: Order processing and dispute handling
- `test-retailer-point-asm.js`: Retailer point management
- `test-demand-generation.js`: Demand generation workflow

Test Execution

Run All Tests:

```
runAllTests(); // Comprehensive system testing
```

Individual Module Tests:

```
runAllVisitTests();           // Visit system
runAllTriggerTests();         // Trigger management
runAllDemandGenerationTests(); // Demand generation
```

Quick Verification:

```
quickTriggerTest();           // Rapid trigger verification
quickVisitTest();             // Basic visit functionality
```

Test Categories

Unit Tests

- Individual function testing
- Data validation testing
- Error handling verification

Integration Tests

- End-to-end workflow testing
- Cross-module communication
- External API integration

Performance Tests

- Load testing for high-volume operations
- Trigger performance verification

- Notification delivery testing

Troubleshooting

Common Issues & Solutions

Trigger Issues

Problem: Duplicate triggers causing multiple executions

Solution: Run `createAllTriggersMenu()` to clean up and recreate all triggers

Problem: Triggers not firing for form submissions

Solution: Verify spreadsheet IDs in config.js match actual form response sheets

Notification Issues

Problem: WhatsApp messages not being sent

Solution:

1. Check WhatsApp API credentials
2. Verify phone number formats
3. Check employee data for valid WhatsApp numbers

Data Issues

Problem: Sheet not found errors

Solution: Run `initializeCRMSpreadsheet()` to create missing sheets

Problem: Data validation failures

Solution:

1. Check schema definitions in config.js
2. Verify data types match expected formats
3. Review validation functions in validation.js

Performance Issues

Problem: Slow form processing

Solution:

1. Optimize sheet operations to reduce API calls
2. Implement batching for bulk operations
3. Add caching for frequently accessed data

Debug Tools

Logging & Monitoring

```
// Enable detailed logging
console.log('Debug info:', debugData);
Logger.log('Persistent log entry');
```

Test Functions

```
// Quick system health check
quickSystemTest();

// Detailed component testing
runSpecificModuleTest('order');
```

Manual Verification

```
// Check trigger status
viewCurrentTriggers();

// Verify sheet structures
validateAllSheets();

// Test notification delivery
testNotificationSystem();
```

Support Resources

Documentation

- System architecture diagrams
- API documentation
- User guides and tutorials

Monitoring

- Error tracking and alerts
- Performance metrics
- Usage analytics






Maintenance

- Regular backup procedures
- System health checks
- Update and upgrade procedures






Conclusion

The **Anwar Sales Ecosystem** represents a comprehensive, scalable solution for construction material supply chain management. Its modular architecture, robust error handling, and automated workflows make it an ideal platform for businesses looking to streamline their operations and improve customer satisfaction.

Key Strengths

-  **Comprehensive Coverage:** Handles entire customer lifecycle
-  **Automated Workflows:** Reduces manual intervention and errors
-  **Real-time Communication:** WhatsApp integration for instant updates
-  **Scalable Architecture:** Modular design supports business growth
-  **Robust Testing:** Comprehensive test coverage ensures reliability

Future Enhancements

-  Mobile app integration
-  Advanced analytics and reporting
-  AI-powered recommendations
-  Multi-language support
-  Performance optimization

This documentation covers the complete Anwar Sales Ecosystem. For specific implementation details or support, refer to the individual module documentation or contact the development team.