Automated Marketing Pack Portal - Client Intake to Asset Generation

The **Automation System** is an end-to-end workflow designed to streamline the creation of marketing, appraisal and vendor reports for real estate listings. It integrates **Google Sheets**, **Google Forms**, **Google Drive**, and **AI-powered content generation** (via **Pipedream**) into a single automated pipeline.

Outcome (Impact)

- Reduces manual marketing pack preparation by automating document creation, folder setup, and link write-backs
- Produces consistent, template-based outputs with minimal agent re-entry
- Uses a shared **PropertyID** as a join key across all workflows to maintain data integrity

Core Workflows

1. **Marketing Pack Automation**
   Generates **signboard, flyer, and social tile** assets from Slides templates when an agent submits the Marketing Pack form. AI-generated copy (e.g., captions/headlines) is created via a Pipedream endpoint and output links are written back to Sheets.
2. **Vendor Report Automation**
   Generates an AI-assisted **Vendor Report** using a Google Docs template populated with listing data + weekly performance inputs. Outputs are created as both **Google Doc + PDF**, stored in Drive, and logged back to Sheets.
3. **Appraisal Generator**
   Produces a structured appraisal draft using templates and a controlled knowledge base (vector store) to support consistent, reusable content generation.

How everything stays connected

All forms and outputs are linked using a shared **PropertyID**, so listing data flows downstream without manual duplication or retyping.

System Components

Sheets
- PropertyReport: Master listing register (source of truth; contains PropertyID).
- MarketingPack: Form responses used to generate marketing assets.
- VendorReport: Form responses used to generate AI-assisted vendor reports.

Apps Script (Google Workspace)
- Code.gs: doGet/doPost API + marketing automation + shared helpers + Vendor form link generation.
- Vendor.gs: Vendor report automation (mapping, AI call, Doc merge, PDF export).

External Services
- Pipedream (Marketing): AI copy generation endpoint (MARKETING_WEBHOOK_URL stored securely; not committed).
- Pipedream (Vendor): AI narrative generation endpoint + auth token (stored securely; not committed).
- Google Drive: Templates + structured output folders (Slides, Docs, PDFs).

PropertyReport is the single source of truth. Marketing, Appraisal, and Vendor workflows all branch from the same **PropertyID**, ensuring downstream forms and generated assets stay linked without manual re-entry.
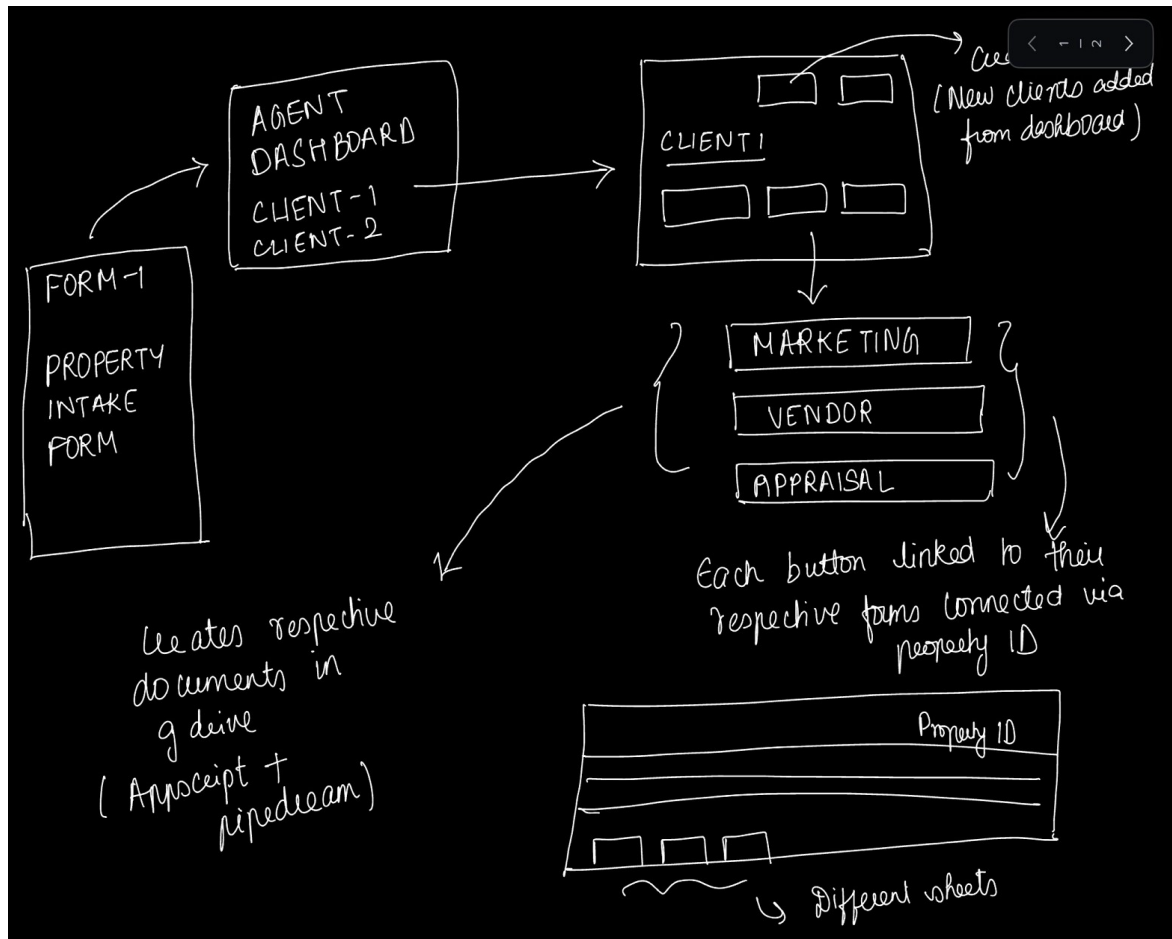

Figure - High-level architecture, PropertyReport (Property Intake Form) is the main sheet, Marketing, Appraisal and Vendor flows off from the same PropertyID.

Dashboard Overview (Agent Portal)

The Agent Portal Dashboard is the operator interface for the automation system. It enables agents to:
• Create a new client/property record via a single intake form.
• View existing records pulled from the PropertyReport sheet.
• Launch downstream forms (Marketing Pack / Vendor Report / Appraisal) without re-entering listing details.

When an agent selects a client record, the portal opens a detail view with links to each workflow. Each workflow is tied to the same PropertyID so duplicates are avoided, and every output is mapped to the correct listing automatically.

Now within existing clients, when a client name is selected, it takes to another page

The dashboard hosts three embedded forms, each serving a distinct purpose. Depending on the requirement, the user can select the relevant form to submit property details. Upon submission, all information is automatically recorded in the linked Google Sheet, with every entry connected through a unique **Property ID** to ensure seamless integration across workflows.

Code Development Environment (VS Code Integration)

All automation logic is developed and maintained through **Google Apps Script**, but the coding, versioning, and debugging are done in **Visual Studio Code** using the **Google Apps Script CLI (clasp)**. This setup allows for professional-grade script management, source control, and modular code design.

Prerequisites & Access

- Access to the Google Sheet containing the three tabs.
- Apps Script editor access to three files: `Code.gs` and `Vendor.gs`.
- Drive IDs for:
    - Slides templates (Signboard, Flyer, Social)
    - Vendor report Google Doc template
    - Output folders (Marketing & Vendor)
- Two Pipedream workflows (one for Marketing, one for Vendor) and their HTTPS endpoints.

Configuration (CONFIG)

All configuration is centralized in `CONFIG`:

- **Marketing**:
    - `SLIDES_TEMPLATE_ID`, `FLYER_TEMPLATE_ID`, `SOCIAL_TEMPLATE_ID`, `OUTPUT_FOLDER_ID`, `PIPEDREAM_URL`
- **Vendor**:
    - `VENDOR_FORM_BASE`, `VENDOR_ENTRY_ID` (entry id of the "Property ID" field in Google Form)
    - `ENDPOINT_URL`, `WRITER_AUTH_TOKEN`, `VECTOR_STORE_ID`, `BRAND_VOICE`
    - `TEMPLATE_VENDOR_ID`, `PROPERTY_ROOT_FOLDER_ID`, `MAX_OFFER`

Data Model
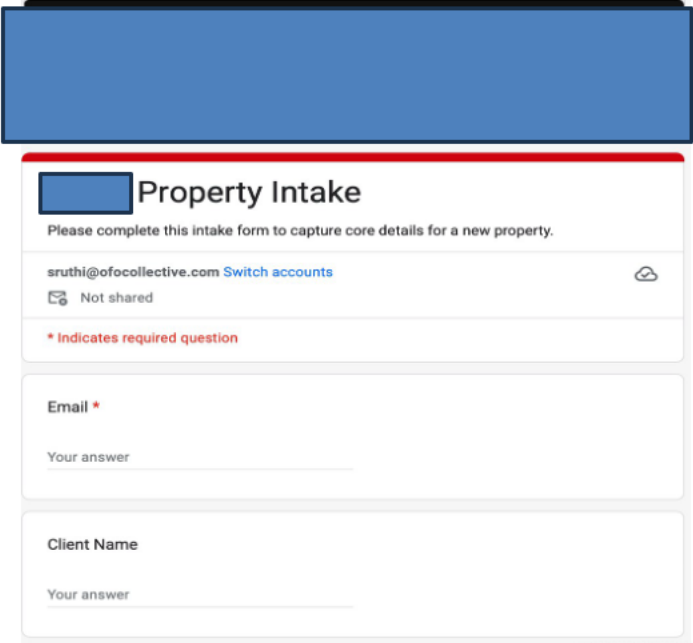
PropertyReport (Source of Truth)

- `PropertyID` *(unique join key across all workflows)*
- Listing details: Address, Suburb, State, Property Type, Sale/Lease, Listing URL
- Agent details: Agent 1/2 Name, Agent 1/2 Mobile

- Size details: Building Area, Site Area
- `VendorReportFormURL` is **generated dynamically** via `doGet` *(not stored as a column)*

VendorReport (Form Responses)

- `PropertyID` *(prefilled from dashboard link)*
- Campaign period: Week, Period From/To, Campaign Mode
- KPIs: REA Views, Domain Views, Enquiries, Offers *(etc.)*
- Narrative inputs: Buyer Quotes, Price Guidance, Risks/Issues, Next Actions
- Scheduling: Next Open Home (date/time)
- Media inputs: Property Photos + Captions, Issues Photos + Captions

Why this matters: `PropertyID` prevents duplicate entry and ensures every downstream form/report maps to the correct listing automatically.

Figure: PropertyReport contains all static property data keyed by PropertyID.

Purpose

Serve JSON to a simple front-end, including **dynamic prefilled Vendor Report form links** for each property.
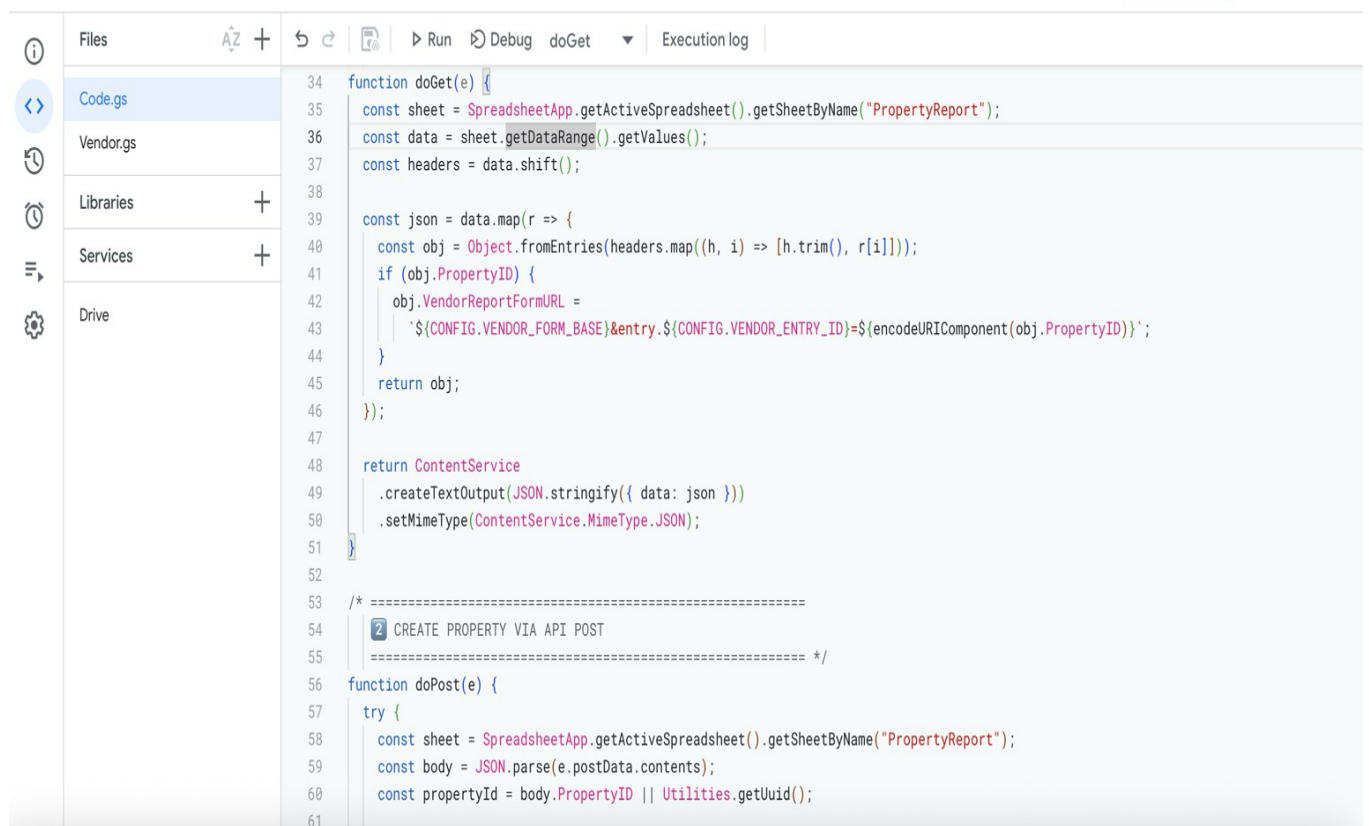
What happens

1) doGet (Code.gs)
• Reads PropertyReport rows and converts each row to JSON.
• Appends VendorReportFormURL to each row using:
  VENDOR_FORM_BASE + "&entry." + VENDOR_ENTRY_ID + "=" +
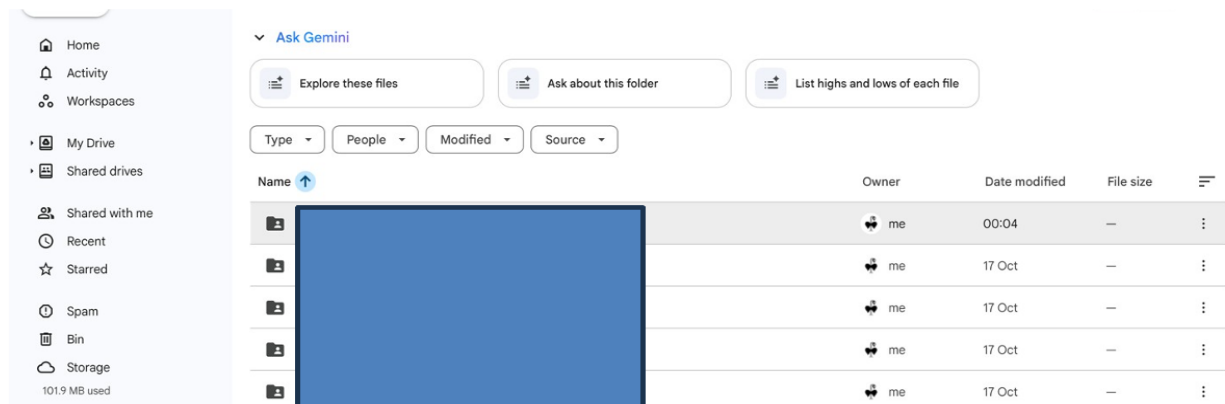encodeURIComponent(PropertyID)

2) doPost (Code.gs)
• Accepts a new property payload.
• Writes a row to PropertyReport.
• Returns { propertyId, vendorURL } to the portal.
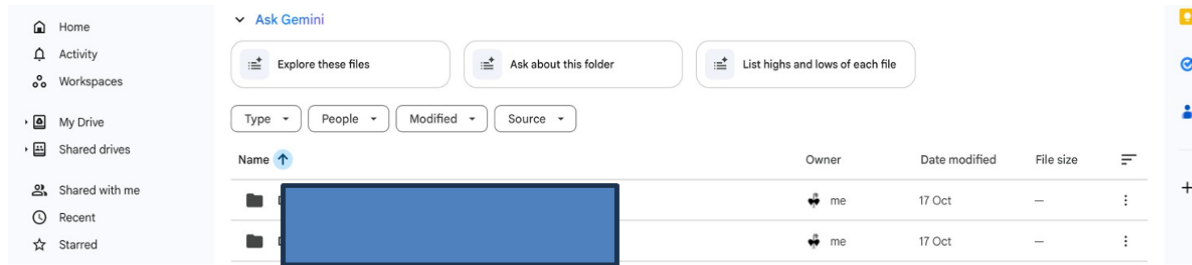
Automation trigger behavior

When an agent submits a Marketing Pack or Vendor Report form response, Apps Script routes execution to the correct automation (Marketing vs Vendor) and outputs are generated within minutes.

A separate folder contains all outputs related to **Vendor Reports**, such as AI-generated documents and corresponding PDF versions.

This folder in Google Drive stores all automatically generated **Marketing Pack materials**, including signboards, social tiles, and flyers.

Conclusion

This automation system demonstrates a complete, end-to-end workflow that turns a single client/property intake into consistent marketing assets and vendor reporting with minimal manual effort. By using PropertyID as the shared join key, the system maintains clean data integrity across Forms, Sheets, Drive outputs, and AI-generated content—eliminating duplicate entry and reducing human error.

The solution is intentionally modular: Apps Script orchestrates data movement and document generation inside Google Workspace, while Pipedream handles AI content generation so the writing layer can evolve without changing the core workflow. Outputs are automatically stored in structured Drive folders and written back into response sheets for fast agent access.

With basic configuration and access controls in place (templates, folders, endpoints, and permissions), this system can be reused across listings and scaled to additional document types with the same architecture.