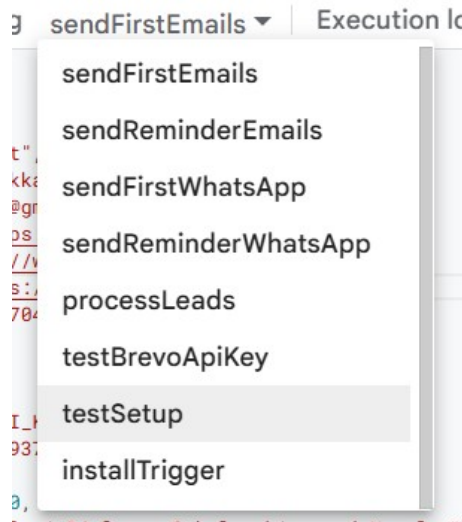


GOOGLE APPS SCRIPT LEAD AUTOMATION

Function Run Order, Testing and Trigger Setup

For email automation with optional Brevo WhatsApp messaging



Apps Script function selector

SAFE START ORDER

testSetup -> testBrevoApiKey (WhatsApp only) -> individual send functions -> processLeads -> installTrigger

Version 1.0 | Prepared as a practical operator guide

1. Before You Run Any Function

Do these checks first. They prevent duplicate messages, failed runs and accidental communication to real leads.

Check	What to confirm
Use one test row only	Enter your own email address and, if needed, your own WhatsApp number.
Back up the sheet	Make a copy of the spreadsheet before testing automation.
Check the sheet tab name	It must exactly match the configured sheet name.
Check row 1 headings	Required headings must match the code configuration.
Keep status fields blank	First email, reminder email and WhatsApp status cells must be blank for the test row.
Confirm the waiting period	For normal use it may be 24 hours. For testing, use an older sent date or a

Check	What to confirm
	shorter test value.
Do not install the trigger yet	Install the trigger only after every individual function works correctly.

Required Sheet Columns

For email-only automation, the minimum recommended headings are:

Email	Name	First email status/date	Reminder status/date
email_address	first_name	First email / First email date	Reminder Email / Reminder Email Date

Important: If WhatsApp is enabled, the phone and WhatsApp status/date columns must also be present.

2. Recommended Function Run Order

1

testSetup - *Always run first*

Purpose: Checks the sheet tab and required columns. Approve Google permissions when prompted.

Expected result: The execution completes without error and the log says the setup is valid.

2

testBrevoApiKey - *WhatsApp only*

Purpose: Checks whether BREVO_API_KEY exists in Script Properties and whether Brevo accepts it.

Expected result: Run only when WhatsApp automation is enabled.

3

sendFirstEmails - *Manual test*

Purpose: Sends the first email to rows that have a valid email address and a blank first-email status.

Expected result: The test email arrives; status becomes SENT; date is recorded.

4

sendReminderEmails - *Manual test*

Purpose: Sends a reminder only after the configured waiting period and only when the reminder status is blank.

Expected result: The reminder arrives; reminder status becomes SENT; date is recorded.

5

sendFirstWhatsApp - *WhatsApp only*

Purpose: Sends the approved first WhatsApp template through Brevo.

Expected result: Message arrives and the sheet records SENT plus the API response.

6

sendReminderWhatsApp - *WhatsApp only*

Purpose: Sends the WhatsApp reminder after the configured waiting period.

Expected result: Reminder date and API response are recorded.

7

processLeads - *Combined manual test*

Purpose: Runs the complete workflow together. Use only after all individual functions succeed.

Expected result: No duplicate messages; each eligible field updates correctly.

8

installTrigger - *Run last*

Purpose: Deletes an old trigger for the same handler and installs the scheduled automation trigger.

Expected result: A new trigger appears in Apps Script > Triggers.

3. Choose the Correct Path

EMAIL-ONLY AUTOMATION

- 1. testSetup
- 2. sendFirstEmails
- 3. sendReminderEmails
- 4. processLeads
- 5. installTrigger

EMAIL + BREVO WHATSAPP

- 1. testSetup
- 2. testBrevoApiKey
- 3. sendFirstEmails
- 4. sendReminderEmails
- 5. sendFirstWhatsApp
- 6. sendReminderWhatsApp
- 7. processLeads
- 8. installTrigger

Testing the Reminder Without Waiting 24 Hours

- Option A: Temporarily set reminderHours to 1 for testing.
- Option B: Manually change the first-email sent date in the test row to an older date.
- Keep the reminder status and reminder date blank before running sendReminderEmails.
- Return reminderHours to the intended value before installing the trigger.

What processLeads Does

The combined process function runs the active workflow in one sequence. In an email-only setup, it sends first emails and eligible reminders. In a WhatsApp-enabled setup, it also runs the first and reminder WhatsApp functions. A script lock prevents overlapping runs.

New lead

First email

Wait period

Reminder email

Status updated

4. Install and Verify the Trigger

1. **Run installTrigger once** - Do this only after the manual tests pass.
2. **Open Apps Script > Triggers** - Confirm that processLeads is listed as a time-driven trigger.
3. **Check the interval** - Verify that the interval matches the configured minutes.
4. **Wait for one automatic cycle** - Use a controlled test row and confirm that the sheet updates without manually running a function.
5. **Review Executions** - Open Apps Script > Executions to confirm successful scheduled runs and inspect errors.

Do not repeatedly run installTrigger. The script is designed to replace the old trigger for the same handler, but the safest practice is to install it only once after testing.

5. Safety Rules

- Never test with the complete live lead database.
- Use your own email and phone number for the first test.
- Do not clear SENT markers on real rows unless you intentionally want to send the message again.
- Check Gmail daily sending limits before running large campaigns.
- Keep the Brevo API key only in Script Properties - never in the spreadsheet or public webpage.
- Use approved WhatsApp templates and consented contact data.
- Pause or delete the trigger before changing column names or campaign settings.

6. Troubleshooting

Problem	Likely cause	Action
Sheet not found	The configured sheetName does not exactly match the spreadsheet tab name.	Correct the tab name or configuration, then rerun testSetup.
Missing required columns	One or more row 1 headings do not match the expected headings.	Correct the headings; avoid extra spaces and spelling differences.
Email not sent	Email is invalid, status is already filled, lead is skipped, or Gmail permission is missing.	Use a valid test email, clear only the test status cell, check lead status and approve permissions.
Reminder not sent	The waiting period has not passed, the reminder status is filled, or the response blocks reminders.	Use an older first-email date and confirm reminder fields are blank.
Brevo API key not found	BREVO_API_KEY is missing from Script Properties.	Add it under Project Settings > Script Properties.

Problem	Likely cause	Action
WhatsApp error response	Template, sender, number format or Brevo setup may be invalid.	Read the API response column and correct the sender/template/contact number.
Duplicate messages	A SENT marker was cleared, a duplicate row exists, or multiple scripts/triggers are active.	Stop the trigger, inspect duplicates and existing project triggers, then test again.
Trigger runs but nothing happens	No row is currently eligible for sending.	Check email validity, blank status fields, waiting time and skip statuses.

Final Go-Live Checklist

- ☐ testSetup completed successfully.
- ☐ First email tested and received.
- ☐ Reminder email tested and received.
- ☐ WhatsApp tests completed, if enabled.
- ☐ processLeads tested with one controlled row.
- ☐ Live reminder timing restored.
- ☐ Trigger installed and visible.
- ☐ Automatic run confirmed in Executions.
- ☐ Test data removed or clearly marked.

StudyTable by ITforAll.org - Learn Together. Build Practical Systems.