

Zapier Operations Overview - Relocation Roadmaps

Purpose

We use Zapier for the basics: backups, sales logging, and tracking subscribers. We keep these automations simple, and design for reliability.

Design Approach

Every workflow must be easy to verify. We never use Zapier for core business logic or decision-making. If a process needs judgment it doesn't belong in an automation. We don't do complex and fragile automations.

Active Automations

1. Daily Backup - Guides → Google Drive

Purpose Backs up the Guides database to Google Drive. This gives us redundancy if the primary source fails.

Trigger Runs every day on a schedule.

Actions Exports the current Guides data and drops a file into Google Drive.

Failure Handling We send a heartbeat ping to an external monitor at the end of the run. If the Zap fails or hangs, the ping never sends, and we get an alert.

2. Daily Backup - Vendors → Google Drive

Purpose Backs up the Vendors database to Google Drive.

Trigger Runs every day on a schedule.

Actions Exports the Vendors data and saves the file to Google Drive.

Failure Handling Uses the same heartbeat check as the Guides backup. If it misses a run, we know.

3. RR - Sales - Payhip → Google Sheets

Purpose Logs sales for quick reconciliation.

Trigger A customer buys something in Payhip.

Actions Adds a new row to a Google Sheet with the transaction details.

Failure Handling We rely on Zapier's built-in error logs. No external monitoring here.

4. Buyer Tag - Payhip → ConvertKit

Purpose Segments actual buyers from the general mailing list.

Trigger A customer buys something in Payhip.

Actions Tags the subscriber in ConvertKit.

Failure Handling Standard Zapier status checks. We review errors manually if numbers look off.

5. Subscriber Log - ConvertKit → Google Sheets

Purpose Keeps a simple, accessible log of new subscribers outside the email platform.

Trigger A new user joins the list via a Kit form on our home page..

Actions Adds subscriber info to a Google Sheet.

Failure Handling Standard Zapier error logs.

Intentional Limitations

We don't use Zapier for routing, conditional logic, or critical decisions. If a Zap proves unreliable or hard to watch, it is deleted and redeveloped if necessary.