

# Zapier Operations Overview - Relocation Roadmaps

## Purpose

We use Zapier for the basics: backups, sales logging, subscriber tracking, and moving audit findings into the review queue. We keep automations simple and design for reliability.

## Design Approach

Every workflow must be easy to verify. We do not use Zapier for core business logic or decision-making. If a process needs judgment, it stays manual.

## Active Automations

### 1. Auditor - Sheets → Notion (Audit Review)

#### Purpose

Turns audit findings into an editor review queue.

#### Trigger

New Spreadsheet Row in Google Sheets.

#### Actions

Creates a matching item in Notion (Audit Review) and writes the returned Notion page ID back to the original Google Sheets row for traceability.

#### Failure Handling

We rely on Zapier's built-in error logs. If the Notion queue count looks wrong, we review the Zap history and reconcile against the Sheets log.

### 2. Daily Backup - Guides → Google Drive

#### Purpose

Backs up the Guides database to Google Drive for redundancy.

#### Trigger

Runs every day on a schedule.

#### Actions

Exports the current Guides data and saves a file to Google Drive.

#### Failure Handling

Sends 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.

### **3. 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.

### **4. 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.

### **5. Buyer Tag - Payhip → ConvertKit**

#### **Purpose**

Segments 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.

### **6. Subscriber Log - ConvertKit → Google Sheets**

#### **Purpose**

Keeps a simple 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.

## **7. Optional - Zapier Errors → Google Sheets (zapier\_error\_log)**

### **Purpose**

Keeps a persistent error log outside Zapier for visibility and review.

### **Trigger**

Zapier Manager - New Zap Error.

### **Actions**

Writes a row to a dedicated `zapier_error_log` tab in Google Sheets with the Zap name, error message, limited context, and a link back to the Zap.

### **Failure Handling**

This is a monitoring Zap. If it fails, we fall back to Zapier's native task history and error reporting.

## **Intentional Limitations**

We don't use Zapier for routing, conditional logic, or critical decisions. If a Zap becomes unreliable or hard to verify, it is removed and rebuilt in a simpler form.