

# 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.