

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.