AI & Automation 101

Cover letter

Hi — this guide is designed to be practical and easy to read. Each topic gets one clean page with a short explanation, a concrete example, and simple do/avoid lists.

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1. API Keys

Private credentials that authenticate your app. Treat as secrets.

Quick example

Apply this in TheLazyCPA signup flow with clear validation, confirmation emails, and persistent lead storage.

Do

- Keep it simple
- Document assumptions
- Test with real submissions

Avoid

- Hidden configuration
- Silent failures
- Overengineering too early

2. Terminal Basics

Fast command-line control for deployments, scripts, and debugging.

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3. Environment Variables

Keep config outside code across dev/preview/prod.

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4. Webhooks

Automatic event messages between systems.

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5. APIs

Clear contracts for system-to-system communication.

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6. Data Storage

Use durable storage in production, not ephemeral runtime files.

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7. Automation Flow

Trigger → logic → action → logging.

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8. Prompting AI

Specific context and output format improve reliability.

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9. Human Approval

Add approval gates for high-risk actions.

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10. Monitoring

Track health and failures proactively.

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11. Security Basics

Least privilege, token rotation, and auditability.

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12. Iteration Loop

Ship, measure, improve weekly.

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