

Automation Tips & Tricks

A growing reference for useful tools, workflows, and shortcuts that make business operations faster.

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1. Batch File Operations

Rename, move, and organize hundreds of files in seconds instead of clicking through Explorer one at a time. This is how we organized the WNZ sessions and strategy docs — and it scales to any size.

Example use cases:

- Rename 500 photos with a consistent naming convention
 - Sort a year's worth of invoices into monthly folders
 - Add dates to every file in a directory at once
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2. Auto-Generate PDFs from Markdown

Tools like `md-to-pdf` can convert `.md` files to styled PDFs automatically — write once, and the PDF stays in sync. No more manual exporting or copy-pasting into Word.

Why this matters:

- Markdown is easy to write and version-track
 - PDFs are what clients see — professional and polished
 - One command regenerates every PDF when content changes
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3. Templates & Boilerplate

Create reusable templates for recurring tasks so nothing gets missed:

- **New client onboarding** → auto-create folder structure + starter docs
 - **New session** → scaffold `Assets/Markdown/PDF` with pre-filled service agreement, invoice, and receipt
 - **New project** → generate a standard folder hierarchy instantly
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4. Instant Search Across Everything

Instead of opening files one by one, search tools can look **inside every file at once**.

Example queries:

- "Find every document that mentions WNZ scholarship"
- "Which invoices reference a specific client?"
- "Where did I write about membership pricing?"

Results come back in milliseconds across the entire workspace.

5. Data at a Glance

Quick scripts can answer business questions instantly:

- How many sessions have I done this year?
 - What's the total invoiced amount across all clients?
 - Which documents are missing their PDF pair?
 - When was the last time a specific file was updated?
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6. Scheduled Automation

Windows Task Scheduler can run scripts on a repeating schedule:

- **Nightly** → auto-backup business files
 - **Weekly** → generate a summary of new/modified documents
 - **Sunday** → clean up temp files and empty folders
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7. Web Scraping & Research

Pull structured data from websites automatically instead of copy-pasting:

- Competitor pricing and service comparisons
 - Event listings and venue details
 - Resource directories and contact info
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Priority Recommendations

Priority	What	Why
1	Session scaffolding workflow	One command sets up everything for a new client session
2	Auto PDF generation	Write markdown, get polished PDFs automatically
3	Quick search across all docs	Find anything in seconds

This document will be updated as new tips and workflows are discovered.