

# Automation Tips & Tricks

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

Created: 2026-02-08

---

## 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 WNQ 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
- 

## 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
- 

## 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
- 

## 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 WNQ 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?
- 

## 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
- 

## 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
- 

## Priority Recommendations

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

---

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