AUTOMATION & INTEGRATIONS · SAMPLE DELIVERABLE

Automation Workflows: Maps, Code and Results

For: Kilima Home Goods (fictional) · Zapier, Make and Google Apps Script

SAMPLE · FICTIONAL DATA

Automations live	Hours saved	Enquiry reply time	Manual errors
3	≈ 26 h	2 min	0
tested and documented	per month	was 1 working day	in the first 60 days

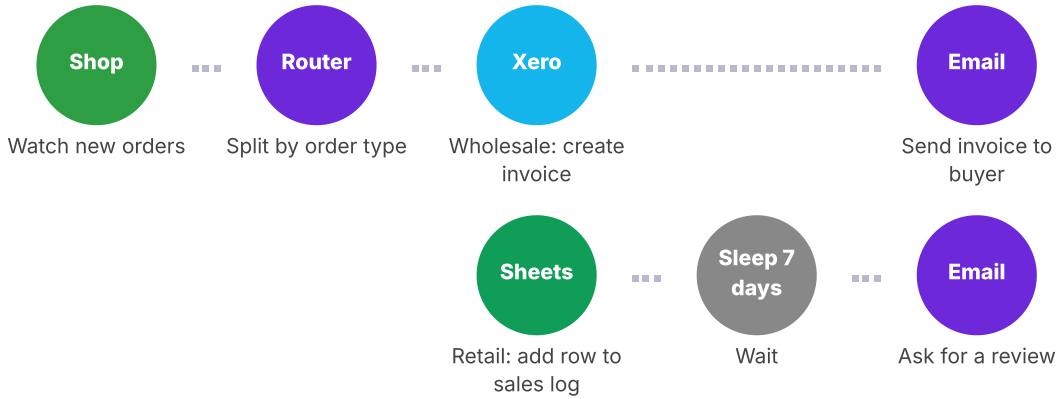
1. New enquiry → CRM → task → reply

Zapier Every website enquiry is logged, assigned and answered within minutes – even at weekends.

1. **TRIGGER** — **Website form (Fluent Forms)**
   New enquiry submitted on the Contact page
2. **FILTER** — **Only continue if...**
   Email does not contain 'test' and service field is filled in
3. **ACTION** — **CRM – create or update contact**
   Name, email, service wanted, source = 'Website'
4. **ACTION** — **Trello – create card**
   List 'Requests in', due in 1 working day, label by service
5. **ACTION** — **Gmail – send reply**
   Personal-sounding acknowledgement with booking link

2. New order → invoice or review request

Make One scenario handles every order. A router sends wholesale and retail orders down different paths.



Safeguards we built in

- Errors email the owner and pause the scenario – nothing fails silently
- Every run is logged in a Google Sheet for checking
- A person approves wholesale invoices over £1,000 before they are sent

3. Monthly report in one click (Google Apps Script)

Apps Script **Google Sheets** Runs on the 1st of each month. Excerpt of the script we wrote and documented:

```
// Monthly sales report — runs on the 1st at 7am (time-driven trigger).
// Totals last month's orders by channel, saves a PDF, leaves an email DRAFT.
function buildMonthlyReport() {
  const ss = SpreadsheetApp.getActive();
  const orders = ss.getSheetByName('Orders').getDataRange().getValues().slice(1);
  const now = new Date();
  const from = new Date(now.getFullYear(), now.getMonth() - 1, 1);
  const to = new Date(now.getFullYear(), now.getMonth(), 1);

  // Columns: 0 date, 1 order id, 2 channel, 3 total, 4 status
  const rows = orders.filter(r => r[0] >= from && r[0] < to && r[4] !== 'Refunded');
  const byChannel = {};
  rows.forEach(r => byChannel[r[2]] = (byChannel[r[2]] || 0) + Number(r[3]));
  const revenue = rows.reduce((s, r) => s + Number(r[3]), 0);

  // Write the summary to the 'Report' tab (charts there update automatically)
  const rep = ss.getSheetByName('Report');
  rep.getRange('B2:B4').setValues([[from], [rows.length], [revenue]]);
  rep.getRange(2, 4, Object.keys(byChannel).length, 2)
     .setValues(Object.entries(byChannel));
  SpreadsheetApp.flush();
  // Export the Report tab as a PDF into the shared Reports folder
  const url = ss.getUrl().replace(/edit.*$/, '') +
    'export?format=pdf&gid=' + rep.getSheetId() + '&portrait=false';
  const pdf = UrlFetchApp.fetch(url, {
    headers: { Authorization: 'Bearer ' + ScriptApp.getOAuthToken() }
  }).getBlob().setName('Sales report ' +
    Utilities.formatDate(from, 'Europe/London', 'MMMM yyyy') + '.pdf');
  DriveApp.getFolderById(REPORTS_FOLDER_ID).createFile(pdf);

  // Draft only — a person reviews before anything is sent
  GmailApp.createDraft(OWNER_EMAIL, 'Monthly sales report',
    'Hi Amani, last month\'s report is attached. Revenue: £' + revenue.toFixed(2),
    { attachments: [pdf] });
}
```

Result

3 hours → 4 minutes

The owner used to build this report by hand from three exports. Now it's waiting as a draft email on the 1st of every month.

What the client receives

- The working automation, in their own account
- A one-page guide: what it does, when it runs, how to pause it
- A map of every step (like the diagrams on page 1)
- A test log showing it was checked with real-looking data

Before and after (all three automations)

Task	Before	After
Enquiries logged and answered	4 h / month	15 min check
Wholesale invoicing	6 h / month	30 min approval
Monthly sales report	3 h / month	4 min
Review requests	Rarely sent	Every retail order

Our rule: automations prepare the work; a person checks anything that goes to a customer or moves money.

Fictional business and data. Zapier, Make, Xero and Google are trademarks of their owners; Bridge Imara is not affiliated with them. Automations are built in the client's own accounts and subscriptions.