

Simple Automation Documentation Template

Automation Name

[Name of Your Automation - e.g., "Newsletter Idea Auto-Processor"]

1. What it Does

[Briefly describe the main function of this automation. What problem does it solve or what task does it handle?]

Example: "Automatically captures content ideas labeled 'content-idea' in Google Tasks, generates related ideas using AI, and sends them to the #brain-dump-ideas Slack channel."

2. Why it Exists (The "Why")

[Explain the purpose and benefit.]

Example: "To ensure no content ideas are lost, to generate a backlog of on-brand content, and to keep the main task list focused on current priorities."

3. How to Check if It's Working

Primary Check

[How to verify the automation is functioning correctly]

Example: "Monitor the #logs Slack channel for success/error messages related to this automation."

Secondary Check (Optional)

[Additional verification method]

Example: "Verify that new ideas appear in the #brain-dump-ideas channel after adding a 'content-idea' task in Google Tasks."

Direct Link to Scenario (If applicable)

[Link to automation tool scenario]

Example: "Make.com Scenario Link: [Insert Link Here]"

4. What to Do If It Fails (Backup Plan)

Immediate Action

[First steps when automation fails]

Example: "Check the error message in the #logs channel for details."

Manual Process

[Steps to achieve the automation's goal manually]

Example: "Manually copy the task from Google Tasks, paste it into the AI tool for idea generation, and then post the results to the #brain-dump-ideas Slack channel."

Troubleshooting

[How to investigate and fix issues]

Example: "Review the Make.com scenario execution history for errors."

5. Who to Contact for Help (If applicable)

[Support contact information]

Example: "Your Name/Team Name" or "N/A if solo"

6. AI Agent Monitoring (If applicable)

[Description of AI monitoring setup]

Example: "The AI Agent monitors Make.com scenario [Scenario Name/ID] and reports status to #logs. It may offer initial troubleshooting suggestions based on common error types."

Tips for Using This Template

1. **Keep it Simple:** Focus on clarity and brevity. If you can't explain it simply, consider simplifying the automation.
2. **Update Regularly:** Review and update this documentation whenever you make changes to the automation.
3. **Test the Backup Plan:** Periodically verify that the manual process works when the automation is down.
4. **Use Visual Aids:** Consider adding screenshots or diagrams for complex steps.
5. **Version Control:** Keep track of major changes to both the automation and its documentation.