

This is a sample document using fictional business data.

Inquiry pilot: operating notes

For an example service business with one website form, one inquiry tracker and a named reviewer. The handover identifies the deployed workflow, account owners and operator controls.

1. How it runs

A website inquiry arrives with a request ID.

The workflow checks required fields and looks for an earlier delivery of the same request.

A valid request becomes one tracker record. Missing details and failures stay visible.

A reply draft is prepared for the reviewer. Editing a draft resets approval.

The reviewer chooses the next action. Sending and financial actions require the permissions agreed in scope.

Keep secret values out of operating notes.

2. Daily checks

- Compare new intake requests with tracker records. Investigate a missing or repeated request ID.
- Review requests with missing fields and drafts waiting for approval.
- Check failed runs and interrupted attempts before replaying anything.
- Confirm who owns each unresolved exception. Do not assume an alert means someone acted.

3. Weekly checks

- Review repeated failures, duplicates and time spent resolving exceptions.
- Check provider quotas and usage against the agreed workload.
- Check that account permissions still match the workflow scope.
- Use an agreed controlled request to check intake, review and recovery after a provider or workflow change.
- Apply the agreed retention and deletion schedule.

4. Read the logs

At handover, record where an authorized operator can see run history and how long it is kept.

Request ID

Connects the intake, tracker record and run history. Example: INQ-EXAMPLE-001.

Stage and status

Shows whether validation, record creation or review preparation completed, failed or needs attention.

Timestamp and attempt

Helps distinguish an original delivery from a later retry.

Safe failure reason

Names the failed stage and whether recovery is possible without exposing credentials or copying a full inquiry into diagnostic logs.

A successful record save is different from a delivered email or a completed downstream action. Check the result for the specific stage.

5. Recognize a failure and recover

A missing required field needs correction. An expired credential needs authorized access repair. A quota or destination outage may need a later retry. A saved record with an uncertain later action needs reconciliation before replay.

Find the request ID and last confirmed successful stage.

Check whether the destination already has the record or action.

Resolve the cause or ask the account owner for help.

Use the agreed retry control only after checking duplicate protection.

Confirm the destination and review queue, then record the resolution.

Do not repeatedly resubmit a request when the last outcome is uncertain.

6. Pause the workflow

Use the agreed disable control for the intake trigger. Then check any in-flight run and queued work before resuming. Preserve the request references needed for recovery.

Ask the named operator before changing a live workflow if you do not know the pause and recovery controls.

7. Rotate a key

Have the client account owner create a replacement with only the required permissions.

Update the credential through the agreed secret store or platform control. Do not paste it into source, logs or these notes.

Check a controlled request and its destination.

Revoke the old key and verify it is no longer used.

Record who changed it and when, without recording the value.

If a key is exposed, pause affected work and have the account owner revoke it.

8. Ownership and contacts

The client owns the business accounts and API keys. Project permissions are removed at handover.

For a question about the agreed BuildZn implementation, contact buildznofficial@gmail.com. Include the request ID, failed stage and a redacted observation. Do not send credentials or full confidential records.

An inquiry address is not an ongoing monitoring service.

9. Outside these notes

New channels, additional integrations, historic migration, bulk outreach, unattended sending, new features and ongoing monitoring require a separate scope. A new provider limit or changed API can require investigation rather than a routine retry.

Read the scope and acceptance document or return to the pilot offer.