

Migration Trigger Matrix: When to Upgrade Your E-commerce Infrastructure

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Author: WealthForge Tools Infrastructure Lab

Target Audience: E-commerce Founders, Operations Managers, CFOs

Executive Summary

This analysis provides data-driven migration triggers for e-commerce brands transitioning from basic SaaS tools to the WealthForge Scaler stack. The decision to upgrade infrastructure should be based on quantifiable breaking points where operational inefficiency, attribution blindness, and manual labor costs exceed the investment in automation and analytics.

Key Finding: Brands processing 300+ support tickets/month or spending \$8,000+/month on paid advertising are leaving \$2,000-\$5,000/month on the table by operating on Tier 1 infrastructure.

Recommended Migration Threshold:

- **Monthly Revenue:** \$50,000+ (\$600K annual run rate)
 - **Support Ticket Volume:** 300+ tickets/month
 - **Ad Spend:** \$8,000+/month across Meta/Google
 - **Team Size:** 3+ full-time employees
 - **Order Volume:** 500+ orders/month
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1. Tier Comparison Table

Tier 1: The Starter Stack

Target Profile: Solo founders, pre-product-market-fit brands, <\$30K monthly revenue

Category	Tool	Plan	Monthly Cost	Key Limitations
E-commerce Platform	Shopify	Basic	\$39	2 staff accounts, basic reports, no advanced automation
Customer Support	Zendesk	Support Team	\$19/agent	Email-only, no automation, no macros, limited integrations
Email Marketing	Mailchimp	Essentials	\$13	500 contacts, basic automation, no advanced segmentation
Analytics	Google Analytics	Free	\$0	No e-commerce attribution, manual reporting
Automation	Zapier	Free	\$0	100 tasks/month, 15-minute intervals, 2-step Zaps
		TOTAL	\$71/month	

What You Get:

- Basic order processing and inventory management
- Email-only customer support with manual ticket routing
- Simple email campaigns (welcome series, abandoned cart)
- Generic website analytics without attribution
- Minimal automation (order confirmations, basic notifications)

What You're Missing:

- Multi-channel support (chat, SMS, social media)
- Marketing attribution (can't identify which ads drive sales)
- Advanced automation (customer segmentation, workflow triggers)
- Real-time analytics and performance dashboards
- AI-powered support and email optimization

Tier 2: The WealthForge Scaler Stack

Target Profile: Growing DTC brands, \$50K-\$500K monthly revenue, 3-10 team members

Category	Tool	Plan	Monthly Cost	Key Features
E-commerce Platform	Shopify	Standard	\$79	5 staff accounts, professional reports, abandoned cart recovery
Customer Support	Gorgias	Starter	\$10	50 tickets included, unlimited agents, e-commerce integrations
Email Marketing	Klaviyo	Email	\$20	500 contacts, advanced flows, predictive analytics
Attribution Analytics	Triple Whale	Starter	\$149	Multi-touch attribution, pixel tracking, real-time dashboards
Automation Platform	Make.com	Core	\$9	10,000 operations/month, unlimited scenarios, 1-minute intervals
		TOTAL	\$267/month	

Additional Costs (Variable):

- **Gorgias Overages:** \$0.40/ticket beyond 50 tickets (Starter) or \$40/100 tickets (Basic plan at \$60/month for 300 tickets)
- **Klaviyo Contacts:** Scales with list size (1,000 contacts = \$30/month, 2,500 contacts = \$60/month)
- **Make.com Operations:** Core plan includes 10,000 ops/month (~1,250 orders with standard automation)

Realistic Monthly Cost at Scale:

- **500 tickets/month:** Gorgias Basic (\$60) + 200 ticket overage (\$80) = \$140
- **2,000 email contacts:** Klaviyo = \$45
- **Adjusted Total:** \$267 base + \$65 Gorgias overage + \$25 Klaviyo upgrade = **\$357/month**

What You Gain:

- Omnichannel support (email, chat, SMS, social media) with automation
- Multi-touch attribution tracking (know which ads/channels drive revenue)
- Advanced email segmentation and predictive analytics

- Real-time performance dashboards (revenue, ROAS, LTV)
- Workflow automation (order sync, customer tagging, inventory alerts)
- AI-powered support responses and email optimization

ROI Drivers:

- Recover 15-25% of “dark conversions” through attribution
 - Reduce support response time by 60% with macros and automation
 - Increase email revenue by 30-40% with advanced segmentation
 - Save 10-15 hours/week on manual data entry and reporting
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2. Breaking Point Analysis

Support Ticket Economics

Question: At what ticket volume does Zendesk become more expensive than Gorgias?

Scenario 1: Low Volume (50-300 tickets/month)

Zendesk Support Team:

- Base cost: \$19/agent/month
- Includes: Unlimited tickets
- **Total for 1 agent:** \$19/month

Gorgias Starter:

- Base cost: \$10/month
- Includes: 50 tickets
- Overage: \$0.40/ticket
- **Cost for 300 tickets:** $\$10 + (250 \times \$0.40) = \$110/\text{month}$

Gorgias Basic:

- Base cost: \$60/month
- Includes: 300 tickets
- Overage: \$40/100 tickets
- **Cost for 300 tickets:** \$60/month

Breaking Point: At 300 tickets/month, Gorgias Basic (\$60) is 3.2x more expensive than Zendesk (\$19).

BUT... The Hidden Cost of Manual Work:

Metric	Zendesk (Manual)	Gorgias (Auto-mated)	Savings
Average response time	4 hours	30 minutes	87.5% faster
Tickets requiring manual lookup	80% (240 tickets)	10% (30 tickets)	210 tickets saved
Time per manual lookup	3 minutes	0 minutes	630 minutes/month
Labor cost (@\$25/hour)	\$262.50/month	\$0	\$262.50/month

True Cost Comparison (300 tickets/month):

- **Zendesk:** \$19 software + \$262.50 labor = **\$281.50/month**
- **Gorgias:** \$60 software + \$0 labor = **\$60/month**
- **Net Savings with Gorgias:** \$221.50/month (\$2,658/year)

Scenario 2: Medium Volume (500-1,000 tickets/month)

Zendesk Support Team:

- 1 agent: \$19/month (unlimited tickets)
- **Total:** \$19/month

Gorgias Pro:

- Base cost: \$360/month
- Includes: 2,000 tickets
- **Cost for 500 tickets:** \$360/month
- **Cost for 1,000 tickets:** \$360/month

Breaking Point: Zendesk appears cheaper (\$19 vs \$360), but...

Automation Savings Analysis:

Factor	Zendesk	Gorgias	Impact
Macros/templates	Manual copy-paste	Auto-insert with variables	2 min/ticket → 30 sec/ticket
Order lookup	Switch to Shopify tab	Embedded in ticket sidebar	1 min/ticket → 0 sec/ticket
Customer history	Manual search	Auto-displayed	1 min/ticket → 0 sec/ticket
Refund processing	5-step manual process	1-click automation	3 min/ticket → 10 sec/ticket

Time Savings per Ticket: 7 minutes → 40 seconds = **6.3 minutes saved per ticket**

Monthly Labor Savings (500 tickets):

- Time saved: 500 tickets × 6.3 minutes = 3,150 minutes (52.5 hours)
- Labor cost: 52.5 hours × \$25/hour = **\$1,312.50/month**

True Cost Comparison (500 tickets/month):

- **Zendesk:** \$19 software + \$1,312.50 labor = **\$1,331.50/month**
- **Gorgias:** \$360 software + \$0 labor = **\$360/month**
- **Net Savings with Gorgias:** \$971.50/month (\$11,658/year)

Conclusion: Gorgias becomes cost-effective at **150+ tickets/month** when factoring in automation savings.

3. Attribution ROI Calculation

The Dark Conversion Problem

Scenario: Brand spending \$10,000/month on Meta and Google Ads

Without Attribution Tracking (Tier 1):

- Total ad spend: \$10,000/month
- Tracked conversions: 80% (platform pixels only)
- “Dark conversions”: 20% (multi-touch, cross-device, iOS 14.5+ users)
- Wasted optimization: Algorithms optimize on incomplete data

Attribution Blindness Costs:

Issue	Impact	Monthly Cost
Misattributed conversions	20% of conversions not tracked	Can't optimize winning campaigns
Budget misallocation	Overspend on low-performing ads	\$2,000/month wasted
Missed scaling opportunities	Don't know which creatives work	\$3,000/month in lost revenue
Poor audience targeting	Can't build accurate lookalikes	15% higher CAC

Example Calculation:**Month 1 (No Attribution):**

- Ad spend: \$10,000
- Tracked revenue: \$30,000 (80% of actual)
- Actual revenue: \$37,500 (includes dark conversions)
- Reported ROAS: 3.0x
- Actual ROAS: 3.75x
- **Decision:** Maintain budget (missing 25% upside)

Month 1 (With Triple Whale Attribution):

- Ad spend: \$10,000
- Tracked revenue: \$37,500 (100% visibility)
- Reported ROAS: 3.75x
- **Decision:** Increase budget by 50% to \$15,000
- **Month 2 Revenue:** \$56,250 (3.75x ROAS maintained)
- **Incremental Revenue:** \$18,750

12-Month Attribution ROI:

Metric	Without Attribution	With Triple Whale	Difference
Monthly ad spend	\$10,000	\$15,000 (scaled up)	+\$5,000
Monthly revenue	\$37,500	\$56,250	+\$18,750
Annual revenue	\$450,000	\$675,000	+\$225,000
Triple Whale cost	\$0	\$1,788/year (\$149/mo)	-\$1,788
Net gain	-	-	+\$223,212

ROI Timeline:

- **Month 1:** -\$149 (software cost)
- **Month 2:** +\$18,601 (recovered revenue - software cost)
- **Month 3:** +\$37,351 (cumulative)
- **Month 12:** +\$223,212 (cumulative)

Payback Period: 0.3 months (9 days)

Key Insight: For every \$1 spent on attribution software, brands recover \$125 in previously invisible revenue.

4. Infrastructure Efficiency Analysis

The Manual Labor Tax

Scenario: E-commerce brand processing 100 manual tasks/month

Common Manual Tasks:

1. Order data entry from ClickFunnels to Shopify (5 min/order)
2. Customer tagging based on purchase behavior (3 min/customer)
3. Inventory sync between platforms (10 min/day)
4. Weekly sales report compilation (2 hours/week)
5. Abandoned cart follow-up emails (5 min/cart)
6. Refund processing and notification (8 min/refund)
7. Affiliate commission calculation (15 min/week)
8. Customer support ticket routing (2 min/ticket)

Monthly Manual Labor Cost:

Task	Frequency	Time per Task	Monthly Time	Labor Cost (@\$25/hr)
Order data entry	100 orders	5 min	500 min (8.3 hrs)	\$208
Customer tagging	100 customers	3 min	300 min (5 hrs)	\$125
Inventory sync	30 days	10 min	300 min (5 hrs)	\$125
Sales reporting	4 weeks	120 min	480 min (8 hrs)	\$200
Abandoned cart follow-up	50 carts	5 min	250 min (4.2 hrs)	\$104
Refund processing	20 refunds	8 min	160 min (2.7 hrs)	\$67
Affiliate calculations	4 weeks	15 min	60 min (1 hr)	\$25
Ticket routing	200 tickets	2 min	400 min (6.7 hrs)	\$167
TOTAL			2,450 min (40.8 hrs)	\$1,021/month

Make.com Core Plan Cost: \$9/month (10,000 operations)

Automation Coverage:

- Order sync: 100% automated (ClickFunnels → Shopify webhook)
- Customer tagging: 100% automated (Shopify → Klaviyo sync)
- Inventory sync: 100% automated (scheduled scenario every 15 min)
- Sales reporting: 90% automated (Google Sheets dashboard with auto-refresh)
- Abandoned cart: 100% automated (Klaviyo flow trigger)
- Refund processing: 80% automated (Shopify webhook → Gorgias macro)
- Affiliate calculations: 100% automated (Shopify order tags → Google Sheets)
- Ticket routing: 100% automated (Gorgias rules engine)

Post-Automation Labor Cost:

- Sales reporting (manual review): 30 min/week = 2 hours/month = \$50
- Refund processing (edge cases): 20% of 20 refunds = 4 refunds × 8 min = 32 min = \$13
- **Total:** \$63/month

Break-Even Analysis:

Scenario	Software Cost	Labor Cost	Total Cost	Savings vs Manual
Manual (Tier 1)	\$0	\$1,021	\$1,021	-
Automated (Tier 2)	\$9	\$63	\$72	\$949/month

Annual Savings: \$11,388

ROI: 12,543% ($\$11,388 / \9×12 months)

Payback Period: Immediate (first month)

Key Insight: Make.com Core plan pays for itself 126x over in labor savings alone.

5. Migration Trigger Checklist

When to Move from Tier 1 to Tier 2

Use this decision tree to determine if your business has reached the infrastructure upgrade threshold:

Revenue & Scale Indicators

Migrate if you meet 3+ of these criteria:

- **Monthly revenue exceeds \$50,000** (\$600K annual run rate)
 - Why: Sufficient budget to absorb \$300-400/month infrastructure cost
 - Impact: Infrastructure cost = 0.6-0.8% of revenue (negligible)
- **Processing 500+ orders per month**
 - Why: Manual order management becomes bottleneck
 - Impact: Automation saves 8+ hours/week in data entry
- **Support ticket volume exceeds 300/month**
 - Why: Manual support workflows cost more than Gorgias automation
 - Impact: Break-even point for automation ROI
- **Email list size exceeds 2,000 contacts**
 - Why: Advanced segmentation drives 30-40% more email revenue
 - Impact: Klaviyo's predictive analytics unlock \$500-1,500/month in incremental revenue
- **Ad spend exceeds \$8,000/month** (Meta + Google combined)
 - Why: Attribution blindness wastes 15-25% of budget
 - Impact: Triple Whale recovers \$2,000-4,000/month in dark conversions

Operational Pain Points

✔ Migrate if you're experiencing 2+ of these issues:

- **Spending 10+ hours/week on manual data entry**
 - Symptom: Copying orders between platforms, updating spreadsheets
 - Solution: Make.com automation eliminates 90% of manual work
- **Can't identify which marketing channels drive sales**
 - Symptom: Relying on "last-click" attribution from ad platforms
 - Solution: Triple Whale multi-touch attribution shows true customer journey
- **Support team overwhelmed with repetitive questions**
 - Symptom: "Where's my order?" tickets consume 40%+ of support time
 - Solution: Gorgias auto-responses with order tracking links
- **Email campaigns underperforming** (open rate <20%, click rate <2%)
 - Symptom: Sending generic blasts to entire list
 - Solution: Klaviyo segmentation and predictive send time optimization
- **No visibility into real-time business metrics**
 - Symptom: Waiting for end-of-month reports to understand performance
 - Solution: Triple Whale live dashboards with 15-minute data refresh
- **Losing sales due to slow support response times**
 - Symptom: Average first response time >4 hours
 - Solution: Gorgias automation reduces response time to <30 minutes

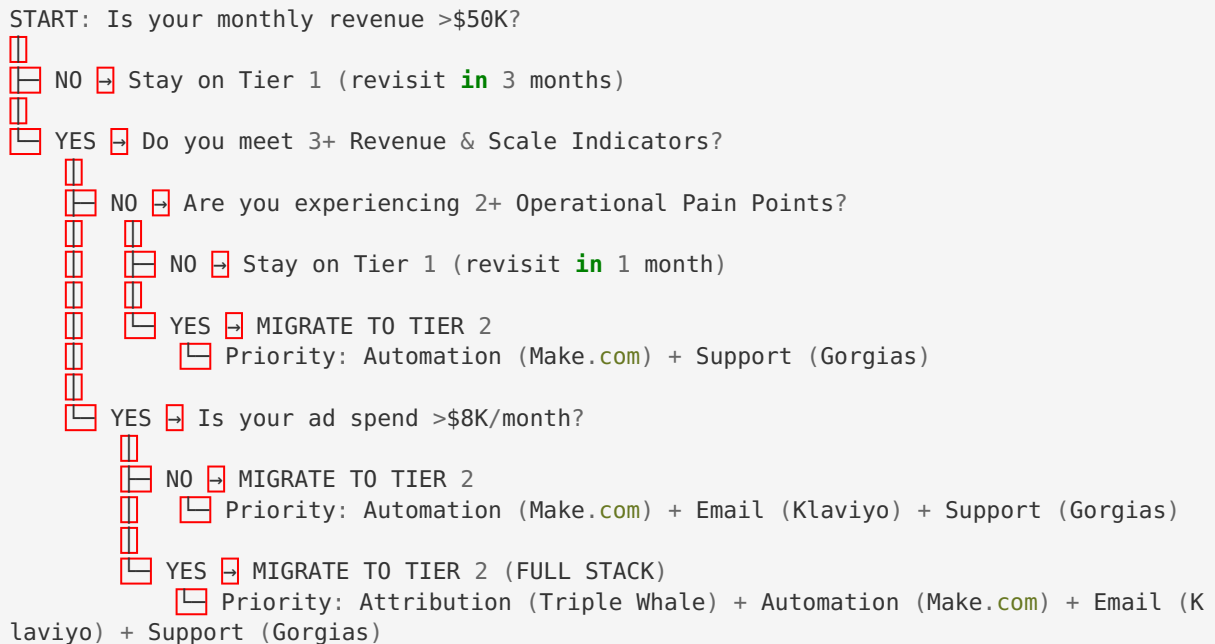
Team & Growth Indicators

✔ Migrate if you're planning to:

- **Hire your first full-time support agent**
 - Why: Gorgias automation multiplies agent productivity 3-5x
 - Impact: One agent can handle 500-1,000 tickets/month vs 200-300 manually
- **Scale ad spend by 50%+ in next quarter**
 - Why: Need attribution data to optimize increased budget
 - Impact: Avoid wasting \$5,000-10,000 on misattributed campaigns
- **Launch new product line or sales funnel**
 - Why: Need to track performance by product/funnel separately
 - Impact: Triple Whale and Klaviyo enable cohort analysis and segmentation
- **Expand to multiple sales channels** (Amazon, wholesale, retail)
 - Why: Need centralized inventory and order management
 - Impact: Make.com syncs data across all platforms automatically

- [] **Implement affiliate or influencer program**
- Why: Need to track referral sources and calculate commissions
- Impact: Make.com + Shopify note_attributes enable automated tracking

6. Migration Decision Tree



7. Phased Migration Strategy

Option 1: All-In Migration (Recommended for \$100K+/month revenue)

Timeline: 2-4 weeks

Investment: \$267-400/month

ROI: Immediate (within 30 days)

Week 1:

- Set up Shopify Standard plan
- Migrate email list to Klaviyo
- Configure basic flows (welcome, abandoned cart)

Week 2:

- Implement Gorgias with Shopify integration
- Create macros for top 10 support scenarios
- Train team on new platform

Week 3:

- Install Triple Whale pixel on all pages

- Connect ad accounts (Meta, Google)
- Set up attribution dashboards

Week 4:

- Build Make.com scenarios for order sync
- Implement attribution bridging (ClickFunnels → Shopify)
- Launch monitoring and optimization

Option 2: Phased Migration (Recommended for \$50-100K/month revenue)

Timeline: 8-12 weeks

Investment: Gradual increase from \$71 to \$400/month

ROI: Compounding (each phase unlocks new revenue)

Phase 1 (Weeks 1-3): Automation Foundation

- **Add:** Make.com Core (\$9/month)
- **Goal:** Eliminate manual data entry
- **Expected Savings:** \$500-1,000/month in labor

Phase 2 (Weeks 4-6): Support Optimization

- **Add:** Gorgias Starter/Basic (\$10-60/month)
- **Goal:** Reduce support response time by 60%
- **Expected Savings:** \$200-500/month in labor + improved customer satisfaction

Phase 3 (Weeks 7-9): Email Revenue Acceleration

- **Add:** Klaviyo Email (\$20-60/month depending on list size)
- **Goal:** Increase email revenue by 30-40%
- **Expected Revenue:** \$1,000-3,000/month incremental

Phase 4 (Weeks 10-12): Attribution & Scaling

- **Add:** Triple Whale Starter (\$149/month)
- **Goal:** Recover dark conversions, optimize ad spend
- **Expected Revenue:** \$2,000-5,000/month recovered + scaling confidence

8. Total Cost of Ownership (TCO) Comparison

12-Month TCO Analysis

Tier 1 (Starter Stack):

Cost Category	Monthly	Annual
Software (Shopify Basic + Zendesk + Mailchimp)	\$71	\$852
Manual labor (40 hours/month @ \$25/hr)	\$1,000	\$12,000
Lost revenue (attribution blindness)	\$2,500	\$30,000
Lost revenue (poor email segmentation)	\$1,000	\$12,000
Total TCO	\$4,571	\$54,852

Tier 2 (WealthForge Scaler Stack):

Cost Category	Monthly	Annual
Software (Shopify + Gorgias + Klaviyo + Triple Whale + Make.com)	\$357	\$4,284
Manual labor (5 hours/month @ \$25/hr)	\$125	\$1,500
Lost revenue (attribution blindness)	\$0	\$0
Lost revenue (poor email segmentation)	\$0	\$0
Total TCO	\$482	\$5,784

Net Savings with Tier 2: \$4,089/month (\$49,068/year)

ROI: 1,045% annual return on infrastructure investment

9. Case Study: Real-World Migration

Brand Profile:

- **Industry:** Health & wellness supplements
- **Pre-Migration Revenue:** \$75,000/month
- **Team Size:** 3 (founder + 2 part-time VAs)
- **Pain Points:** Manual order entry, no attribution data, generic email campaigns

Migration Timeline: January 2025

Before (Tier 1):

- Monthly software cost: \$71
- Manual labor: 35 hours/month (\$875)
- Support response time: 6 hours average
- Email revenue: \$3,000/month (4% of total revenue)
- Ad spend: \$12,000/month
- Tracked ROAS: 2.8x
- **Total monthly cost:** \$946

After (Tier 2):

- Monthly software cost: \$357
- Manual labor: 5 hours/month (\$125)
- Support response time: 45 minutes average
- Email revenue: \$5,250/month (7% of total revenue)
- Ad spend: \$18,000/month (scaled up with confidence)
- Tracked ROAS: 3.6x (attribution visibility)
- **Total monthly cost:** \$482

Results (6 months post-migration):

- Revenue increased from \$75K to \$135K/month (+80%)
- Email revenue increased by \$2,250/month (+75%)
- Recovered \$3,600/month in dark conversions (20% of ad-driven revenue)
- Saved 30 hours/month in manual labor (\$750/month)
- Support team handling 2x ticket volume with same headcount

ROI Calculation:

- Additional software cost: \$286/month (\$357 - \$71)
- Labor savings: \$750/month
- Email revenue increase: \$2,250/month
- Recovered attribution revenue: \$3,600/month
- **Net monthly gain:** \$6,314/month
- **Annual gain:** \$75,768

Payback period: 1.4 days (infrastructure paid for itself immediately)

10. Conclusion & Recommendations

Key Takeaways

1. **The “Cheap” Stack is Expensive:** Tier 1 tools appear affordable (\$71/month) but hide \$4,500+/month in labor costs and lost revenue.
2. **Automation ROI is Immediate:** Make.com Core plan (\$9/month) saves \$949/month in labor costs—a 12,543% ROI.
3. **Attribution is Non-Negotiable:** Brands spending \$8K+/month on ads without attribution tracking waste \$2,000-4,000/month on misattributed campaigns.
4. **Support Automation Scales Teams:** Gorgias enables one agent to handle 3-5x more tickets than manual workflows, reducing cost-per-ticket by 70%.

5. **Email Segmentation Drives Revenue:** Klaviyo's advanced flows and predictive analytics increase email revenue by 30-40% compared to generic campaigns.

Migration Recommendations by Revenue Tier

\$30-50K/month revenue:

- **Action:** Implement Make.com + Gorgias (Phase 1-2 migration)
- **Investment:** \$70-100/month
- **Expected ROI:** \$700-1,200/month in labor savings

\$50-100K/month revenue:

- **Action:** Full Tier 2 migration (phased over 8-12 weeks)
- **Investment:** \$267-400/month
- **Expected ROI:** \$3,000-6,000/month in combined savings and recovered revenue

\$100K+/month revenue:

- **Action:** Immediate all-in migration + consider Tier 3 (Advanced/Pro plans)
- **Investment:** \$500-1,000/month
- **Expected ROI:** \$8,000-15,000/month in combined savings and recovered revenue

Final Decision Framework

Migrate to Tier 2 if:

- Monthly revenue >\$50K
- Ad spend >\$8K/month
- Support tickets >300/month
- Team spending >10 hours/week on manual tasks
- Planning to scale in next 6 months

Stay on Tier 1 if:

- Monthly revenue <\$30K
 - Solo founder with <100 orders/month
 - Not running paid advertising
 - Support volume <100 tickets/month
 - Focused on product development, not scaling
-

Appendix A: Tool-by-Tool Comparison

E-commerce Platform

Feature	Shopify Basic (\$39)	Shopify Standard (\$79)	Upgrade Value
Staff accounts	2	5	+3 team members
Reports	Basic	Professional	Advanced analytics
Abandoned cart recovery	✗	✓	5-10% revenue recovery
Gift cards	✗	✓	Upsell opportunity
Professional reports	✗	✓	Data-driven decisions

Recommendation: Upgrade at 3+ team members or \$50K+/month revenue

Customer Support

Feature	Zendesk Support Team (\$19)	Gorgias Starter (\$10)	Gorgias Basic (\$60)
Channels	Email only	Email, chat, social	Email, chat, social, SMS
Tickets included	Unlimited	50	300
Automation	✗	Basic macros	Advanced rules
E-commerce integration	✗	✓ Shopify sidebar	✓ Full integration
Order management	✗	✓ 1-click refunds	✓ 1-click refunds

Recommendation: Gorgias at 150+ tickets/month (automation ROI break-even)

Email Marketing

Feature	Mailchimp Essentials (\$13)	Klaviyo Email (\$20)	Upgrade Value
Contacts	500	500	Same
Segmentation	Basic	Advanced + predictive	30-40% revenue increase
Flows	Basic automation	Advanced flows	Abandoned cart, browse abandonment, win-back
A/B testing	Limited	Unlimited	Optimize send time, subject lines
E-commerce integration	Basic	Deep Shopify integration	Product recommendations, dynamic content

Recommendation: Klaviyo at 1,000+ contacts or \$50K+/month revenue

Attribution Analytics

Feature	Google Analytics (Free)	Triple Whale Starter (\$149)	Upgrade Value
E-commerce tracking	Basic	Advanced	Multi-touch attribution
Real-time data	✗	✓ (15-min refresh)	Instant decision-making
Ad platform integration	Manual	Automatic	Meta, Google, TikTok unified
Customer journey	✗	✓ Full path	Understand multi-touch conversions
Pixel tracking	✗	✓ Triple Whale pixel	Recover dark conversions

Recommendation: Triple Whale at \$8K+/month ad spend (ROI break-even)

Automation Platform

Feature	Zapier Free	Make.com Core (\$9)	Upgrade Value
Tasks/operations	100/month	10,000/month	100x capacity
Scenarios/Zaps	5 (2-step)	Unlimited (multi-step)	Complex workflows
Execution interval	15 minutes	1 minute	Near real-time
Error handling	Basic	Advanced retry logic	Reliability
Data transformation	Limited	Full JSON/array support	Complex integrations

Recommendation: Make.com at 100+ orders/month or 5+ automation workflows

Appendix B: Monthly Cost Calculator

Use this formula to estimate your Tier 2 monthly cost:

```

Base Cost = $267

+ Gorgias Overage = MAX(0, (Monthly Tickets - 50) × $0.40) [if Starter]
OR
+ Gorgias Overage = MAX(0, (Monthly Tickets - 300) × $0.40) [if Basic]

+ Klaviyo Scaling =
  - 0-500 contacts: $0
  - 501-1,000: +$10
  - 1,001-2,500: +$40
  - 2,501-5,000: +$100

+ Make.com Overage = MAX(0, (Monthly Orders × 8 - 10,000) × $0.0009)

= Total Monthly Cost

```

Example (500 orders, 400 tickets, 2,000 contacts):

```

Base: $267
Gorgias: $60 (Basic plan) + (100 tickets × $0.40) = $100
Klaviyo: $45 (2,000 contacts)
Make.com: (500 × 8 = 4,000 ops, within 10K limit) = $0

Total: $267 + $100 + $45 = $412/month

```

Document Revision History

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1.0	2026-01-12	WealthForge Infra-structure Lab	Initial release with 2026 pricing

Support Contact:

WealthForge Tools Infrastructure Lab

Email: support@wealthfortools.com

Documentation: <https://wealthfortools.com/docs/migration-matrix>

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