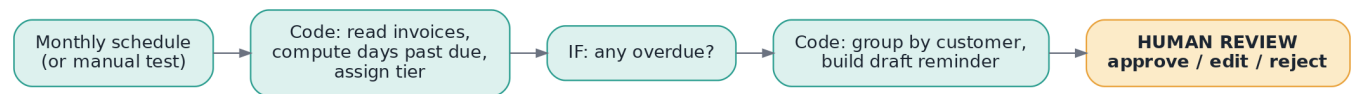


AI Workflow Automation | n8n + Zapier

The same business flow designed for two tools: overdue-invoice follow-up with a human approval step.
Fictional sample data.

Flow in n8n



The importable workflow file is included in this folder. It uses sample invoices inside the first node so it runs without any connection; for real use that node is replaced by a spreadsheet or database read.

Nodes

Node	Type	Purpose
Monthly schedule / Manual test	Trigger	Runs on the 1st of each month, or on demand for testing
Sample invoices and tiering	Code	Computes days past due and assigns Friendly (1-30), Firm (31-60) or Escalate (60+)
Any overdue invoices?	IF	Stops the run when nothing is overdue
Draft reminders by customer	Code	One draft per customer, using the highest tier among their invoices
Human review	No-op placeholder	Where a person approves, edits or rejects. No email is sent automatically

Same flow in Zapier

Step	Zapier action	Notes
1	Schedule by Zapier: every month	Trigger
2	Google Sheets: find rows (unpaid invoices)	Or Excel / Airtable / database app
3	Formatter or Code by Zapier	Days past due and tier, same rules as above
4	Filter	Continue only if days past due is above 0
5	ChatGPT or Claude: draft reminder	Prompt includes invoice facts and tone by tier
6	Gmail: create draft (not send)	The reviewer opens, edits and sends
7	Google Sheets: update row	Log date, tier and reviewer

Design rules used in both tools

- **Human before external action:** drafts are reviewed; the flow never sends on its own.
- **Same rules in both tools:** tiers and thresholds are written once and reused.
- **Logging:** every run records what was drafted, what was sent and who approved.
- **Failure handling:** an empty input stops the run quietly; an error should alert the owner.
- **No secrets in the flow text:** credentials live in the tool's credential store.

To use

- n8n: Workflows, Import from file, choose the JSON, then Execute workflow.
- Replace the sample-invoice node with your real data source before using it on live data.

Sample data only. No real company information is shown.