

Automated Invoice Reminder System – Documentation

1. Trigger

Starts the workflow manually when “Execute Workflow” is clicked.

2. Get Invoice Data

Reads all invoice records from Google Sheets.

3. Filter Overdue + Unpaid

Keeps only invoices that are unpaid and past the due date.

4. Create Data Groups (Rules)

- Unpaid Users
- Overdue Users
- Ambiguous Data (fallback)

5. Send Emails

- Unpaid User Email: Sends reminder for pending invoices.
- Overdue User Email: Sends urgent overdue notice.
- Team Email (Ambiguous): Alerts team to incorrect/missing data.

6. Prepare Credential Document

Explains required credentials, how to generate them, and how to add them in n8n.

7. Setup Instructions

Guide includes importing workflow, environment variables, prerequisites, and test data.

8. Delivery Package Checklist

- Workflow JSON file
- Credential setup document
- README / setup guide
- Sample invoice spreadsheet
- Email templates