

Project Title

Day 28: Automated Invoice & Payment Workflow

Client Role (Office Manager)

Our company BrightPath Consulting provides online training services and sells digital courses. Currently, after every payment through Stripe or PayPal, our finance team manually generates invoices, emails them to customers, and uploads a copy to Google Drive. This process is time-consuming, error-prone, and not scalable as sales grow. We want a system that automatically generates invoices for every successful payment and ensures the customer receives it instantly via email. Also, we need a backup copy of each invoice stored in Google Drive for auditing.

Key Requirements

- Payment trigger: Stripe / PayPal / Shopify - Generate professional invoice (PDF) - Email invoice to customer immediately - Save invoice to Google Drive under "Invoices" folder - Admin should get a copy (CC) - Must be maintainable with our team's APIs

Solution Architecture (n8n Expert)

Tools & Services: - n8n (Automation Engine) - Stripe / PayPal / Shopify Nodes (Triggers) - Function Node (Format data → customer name, order ID, price, date) - PDF Generator Node (Generate invoice) - Google Drive Node (Save PDF) - Gmail / SMTP Node (Send invoice email)

Workflow Steps

1. Trigger Node (Stripe/PayPal/Shopify) - Event: Successful Payment - Extracts payment details 2. Function Node - Clean & format data Example: return [{ invoice_number: 'INV-' + Date.now(), customer_name: \$json.customer_name, customer_email: \$json.customer_email, amount: \$json.amount, product: \$json.product, date: new Date().toISOString().slice(0,10) }]; 3. PDF Node - Template: Invoice layout with company logo - Output: Invoice_INV1234.pdf 4. Google Drive Node - Folder: /Invoices - Upload generated PDF 5. Gmail/SMTP Node - To: customer_email - CC: admin@brightpath.com - Subject: Your Invoice - {{invoice_number}} - Attach PDF

Deliverables

- Fully working n8n workflow (exportable JSON) - Documentation (this file) - Setup Guide: • Connect APIs (Stripe, PayPal, Gmail, Google Drive) • Replace test emails/logos

Benefits to Client

■ 100% automated – no manual invoice handling ■ Faster payment confirmation → happier customers ■ Centralized storage of invoices for audit ■ Scalable – works for 10 or 10,000 payments ■ BYO-API (client connects own accounts)

Next Steps

- Client connects API keys in n8n - Test workflow with sandbox payments - Deploy on VPS/Docker (secured with HTTPS) - Train admin staff on monitoring logs

Final Note (n8n Expert)

This project demonstrates a real, production-grade automation solving a common business pain point. It's reusable, API-independent, and presentable to any firm as a portfolio project.