🔥

WhatsApp Complete System - Templates + Tasks (MERGED)

≡ Description	Unified workflow: delivers free templates, handles task requests with AI, manages credits, and logs everything to Notion
≔ Services	Gemini AI Notion Supabase Twilio WhatsApp n8n
⊙ Status	Draft
⊙ Type	WhatsApp Automation

🔥 Complete WhatsApp System - MERGED

This unified workflow combines **free template delivery** with **full concierge task management**.

What This Does

Stage 1: Template Delivery (Lead Gen)

✅ Automatically sends 5 free ND-aware templates

✅ Keyword-based routing (moving, routine, therapy, bills, social)

✅ Logs all downloads to Notion

✅ Soft upsell to concierge service

Stage 2: Task Management (Revenue)

✅ AI-powered task classification using Gemini

✅ Automatic credit quotes for tasks

✅ YES/NO confirmation handling

✅ Credit balance checking via Supabase

✅ Task lifecycle tracking in Notion

✅ Admin notifications for new tasks

✅ Free quick questions (up to 2 mins research)

Stage 3: Data & Analytics

✅ Logs to 3 Notion databases: Templates, Tasks, Users

✅ Tracks conversion from template → paid task

✅ Credit balance and purchase history

✅ Full message history for context

Integration Overview

- **Twilio WhatsApp API:** Message sending/receiving

- **Google Gemini AI:** Task classification and intent detection

- **Supabase:** Credit balance tracking and transactions

- **Notion API:** All data storage (3 databases)

- **n8n:** Workflow orchestration

Required Notion Databases

1. Template Downloads Database

Purpose: Track free template delivery

Properties:

- Template Name (title)

- User Phone (text)

- User Name (text)

- Template Type (select: Moving, Routine, Therapy, Bills, Social)

- Delivery Status (select: Sent, Failed)

- Downloaded (date)

- Message Body (text)

- Email Captured (checkbox)

- Converted to Task (checkbox) ← **NEW: tracks if they later became a paying customer**

2. Tasks Database

Reference: 📋 Tasks

Purpose: Track all concierge task requests

Key Properties:

- Task Summary (title)

- User Phone (text)

- User Name (text)

- Branch (select: 7 Branches options)

- Credits Quoted (number)

- Status (select: Quoted, Confirmed, In Progress, Complete, Cancelled)

- Message Body (text)

- Confirmed At (date)

- Assigned To (person)

- Outcome (text)
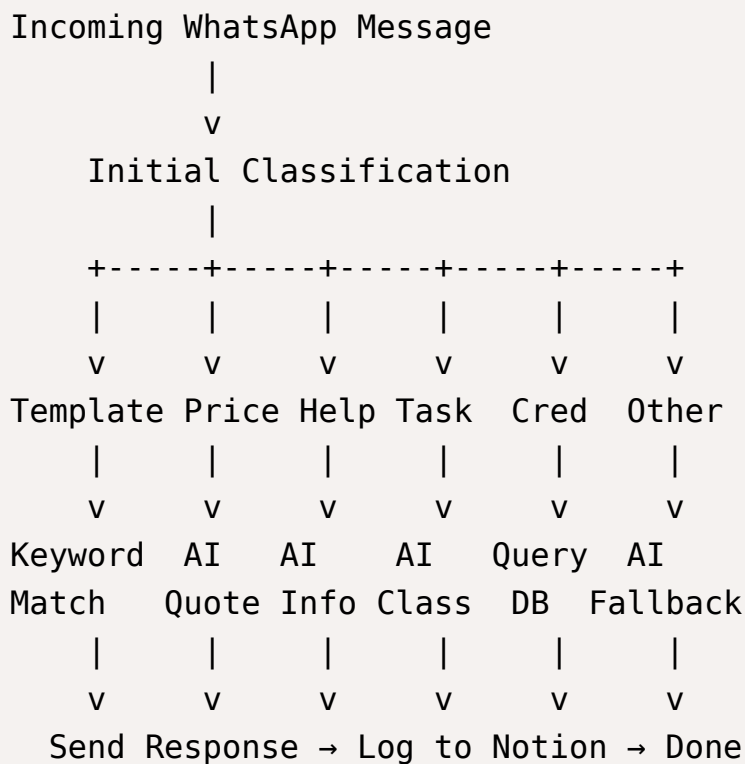
3. Users Database

Reference: 👥 Users

Purpose: Track all users and credit balances

Key Properties:

- Name (title)

- Phone (text)

- Credits Balance (number)

- Pack Type (select)

- Total Spent (number)

- Tasks Completed (number)

- Templates Downloaded (number) ← **NEW**

- First Contact (date)

- Last Activity (date)

Message Flow

```
Incoming WhatsApp Message
          |
          v
    Initial Classification
          |
    +-----+-----+-----+-----+-----+
    |     |     |     |     |     |
    v     v     v     v     v     v
Template Price Help Task  Cred  Other
    |     |     |     |     |     |
    v     v     v     v     v     v
Keyword  AI    AI    AI   Query  AI
Match   Quote Info Class   DB  Fallback
    |     |     |     |     |     |
    v     v     v     v     v     v
   Send Response → Log to Notion → Done
```

Workflow Logic

Step 1: Initial Classification

When a message arrives, check for:

A. Template Keywords (instant match)

- "moving" / "move house" → Moving Checklist

- "routine" / "executive function" → Routine Template

- "therapy" / "therapist" → Therapy Search Tree

- "bills" / "bill audit" → Bill Audit Worksheet

- "social" / "event" / "party" → Social Event Planner

- "help" / "templates" / "what do you have" → List all templates

- "hi" / "hello" / "start" (short message) → Welcome message

B. Service Keywords (AI classification)

- "how much" / "pricing" / "cost" → Pricing template

- "credits" / "balance" / "how many credits" → Check Supabase balance

- "yes" / "confirm" / "let's do it" → Confirm quoted task

- "no" / "cancel" / "not now" → Cancel quoted task

C. Task Requests (AI classification)

- Anything else → Send to Gemini AI for:

  - Task classification

  - Branch identification

  - Credit estimation

  - Generate personalized quote

Step 2: Response Generation

For Templates:

- Send template file link

- Include soft upsell ("Want me to actually DO this task?")

- Log to Template Downloads database

For Task Requests:

- AI generates quote with credits

- Explain what you'll do

- Ask for YES/NO confirmation

- Save task as "Quoted" status in Tasks database

For Confirmations (YES):

- Update task to "Confirmed" status

- Deduct credits from Supabase balance

- Notify admin via Slack/email

- Send confirmation message to user

For Declines (NO):

- Update task to "Cancelled" status

- Reassure user ("No worries! I'm here when you need me")

- Don't deduct credits

Step 3: Database Logging

Every message logs to:

- Template Downloads DB (if template request)

- Tasks DB (if task request/confirmation)

- Users DB (update last activity, increment counters)

Setup Instructions

1. Create Notion Databases

Create these three databases in Notion:

1. **Template Downloads** (use schema above)

2. **Tasks** (link to 📋 Tasks)

3. **Users** (link to 👥 Users)

2. Get API Credentials

Twilio:

1. Go to twilio.com/console

2. Copy Account SID and Auth Token

3. Set up WhatsApp Sandbox or get approved WhatsApp number

Google Gemini:

1. Go to ai.google.dev

2. Create API key

3. Copy API key

Supabase:

1. Create project at supabase.com

2. Create `users` table with columns: `phone` , `credits_balance` , `pack_type`

3. Copy API URL and anon key

Notion:

1. Go to notion.so/my-integrations

2. Create new integration

3. Copy Internal Integration Token

4. Share all 3 databases with the integration

3. Configure n8n

1. Import the workflow JSON (see below)

2. Add credentials for each service

3. Update database IDs in Notion nodes

4. Update Supabase table references

5. Activate workflow

4. Set Twilio Webhook

In Twilio console, set WhatsApp webhook URL to:

```
https://your-n8n-instance.com/webhook/whatsapp-complete
```

Workflow Structure Overview

Core Nodes:

1. **Webhook Trigger** - Receives WhatsApp messages from Twilio

2. **Initial Classifier** - JavaScript code to detect message type

3. **Template Router** - Routes template keyword requests

4. **AI Classifier** - Gemini AI for complex task classification

5. **Template Senders** - 7 nodes sending each template

6. **Task Quote Generator** - AI creates personalized quote

7. **Confirmation Handler** - Processes YES/NO responses

8. **Credit Balance Checker** - Queries Supabase

9. **Notion Loggers** - 6+ nodes logging to different databases

10. **Admin Notifier** - Alerts you of new confirmed tasks

11. **Response Node** - Sends reply via Twilio

Key Features:

- **Smart Fallbacks:** If keyword match fails, AI takes over

- **Context Aware:** AI can reference previous messages (via Notion history)

- **Credit Safety:** Checks balance before confirming tasks

- **Conversion Tracking:** Links template downloads to task conversions

Template Messages

Welcome Message

```
Hey {name}! 👋

Welcome to **SOR7ED** - your neurodivergent-affirming life
admin ally.

**Free ND-Aware Templates:**
📦 Moving House Checklist
📅 Executive Function Routine
🧠 Therapy Search Decision Tree
💰 Bill Audit Worksheet
🎉 Sensory-Friendly Social Planner

**How it works:**
1. Tell me what you need (or request a template)
2. I'll give you a quote in credits
3. Say YES and I'll handle it for you
```

Quick questions? (Under 2 mins research) → FREE!

💬 Try saying: "moving checklist" or "help me find a therapist"

Pricing Template

💰 **SOR7ED Pricing**

How Credits Work:
- Buy credit packs
- Use credits for tasks
- Credits never expire

Credit Packs:
• 5 credits - £15 (£3 each)
• 10 credits - £25 (£2.50 each) ⭐ POPULAR
• 25 credits - £50 (£2 each) 💎 BEST VALUE

What 1 Credit Gets You:
• Research (up to 1 hour)
• 3-5 phone calls
• Form filling
• Basic booking
• Email drafting

Example Tasks:
• Find ND-affirming therapist: 2-3 credits
• Compare car insurance: 2 credits
• Book GP appointment: 1 credit
• Research moving companies: 1-2 credits
• Plan sensory-friendly party: 3-4 credits

Quick questions (under 2 mins) are always FREE!

Reply "buy credits" to purchase a pack.

Help / 7 Branches Template

🌿 **The 7 Branches of Life Admin**

I can help with any of these:

1. 🏥 Healthcare
Book appointments, find specialists, prescription reminders

2. 💰 Finance
Bill audits, insurance quotes, budget tracking

3. 🏡 Home
Utilities setup, maintenance booking, moving coordination

4. 🚗 Transport
MOT reminders, insurance renewals, travel planning

5. 📞 Appointments
Booking, rescheduling, reminder management

6. 🧠 Mental Health
Therapist search, crisis plans, self-care tracking

7. 🎉 Social Life
Event planning, gift buying, RSVP management

Try saying:
• "Find me a therapist in London"
• "Compare my car insurance"
• "Book a GP appointment"
• "Help me plan a birthday party"

Quick questions (under 2 mins) are FREE!

AI Classification Prompt

When a message doesn't match templates or service keywords, send to Gemini with this prompt:

```
You are a task classification assistant for SOR7ED, a conci
erge service for neurodivergent adults.

User message: "{message}"

Analyze this message and return JSON:

{
  "intent": "task_request" | "question" | "unclear",
  "branch": "Healthcare" | "Finance" | "Home" | "Transport"
| "Appointments" | "Mental Health" | "Social Life" | "Othe
r",
  "task_summary": "Brief description of what they want",
  "estimated_credits": 1-10,
  "is_quick_question": true/false (true if under 2 mins res
earch),
  "suggested_response": "Personalized message explaining wh
at you'll do and the credit cost"
}

Examples:
- "I need to find a therapist" → {"intent":"task_reques
t","branch":"Mental Health","estimated_credits":3}
- "What's the weather?" → {"intent":"question","is_quick_qu
estion":true}
- "asdfgh" → {"intent":"unclear"}
```

Testing Checklist

Template Delivery Tests

☐ Send "moving" → Receive moving checklist

☐ Send "routine" → Receive routine template

- ☐ Send "therapy" → Receive therapy tree

- ☐ Send "bills" → Receive bill audit

- ☐ Send "social" → Receive social planner

- ☐ Send "help" → Receive template list

- ☐ Send "hi" → Receive welcome message

- ☐ Verify: Template logged to Notion

Task Management Tests

- ☐ Send "find me a therapist" → Receive AI quote

- ☐ Reply "YES" → Task confirmed, credits deducted

- ☐ Reply "NO" → Task cancelled, reassuring message

- ☐ Send "credits" → Receive balance from Supabase

- ☐ Send "how much does it cost" → Receive pricing

- ☐ Send quick question → Receive free answer

- ☐ Verify: Task logged to Notion

- ☐ Verify: Admin notification sent

Conversion Tracking Tests

- ☐ User downloads template, then requests paid task

- ☐ Verify: Template download record updated with "Converted to Task"

- ☐ Verify: User record shows both template count and task count

n8n Workflow JSON

Note: The complete JSON is very large (1000+ lines). Key sections to customize:

1. **Database IDs:** Replace Notion database IDs with yours

2. **Template URLs:** Add your actual template file URLs

3. **Supabase Config:** Update table names and API endpoints

4. **Admin Contact:** Set your notification method (Slack/email)

5. **AI Prompts:** Customize the Gemini classification prompts

Structure:

- 1 Webhook node
- 1 Initial classifier (JavaScript)
- 8 Router nodes (IF conditions)
- 7 Template sender nodes (Twilio)
- 1 AI classifier node (Gemini)
- 1 Task quote generator (AI)
- 2 Confirmation handlers (YES/NO)
- 1 Credit checker (Supabase)
- 8 Notion logger nodes
- 1 Admin notifier
- 1 Response node

Total: ~30 nodes

Contact me if you need the complete JSON exported!

Analytics & Insights

Track in Notion:

Template Performance:

- Which templates are most downloaded?
- What time of day do people request templates?
- Which templates lead to task conversions?

Task Metrics:

- Average credits per task
- Most common branches
- Confirmation rate (% who say YES after quote)
- Time to completion

User Behavior:

- Template → paid task conversion rate

- Average credits purchased per user

- Repeat customer rate

- Most valuable users

Revenue Model

This merged workflow supports your full business model:

Stage 1: Awareness → Free templates (lead magnet)

Stage 2: Interest → Soft upsell after template delivery

Stage 3: Consideration → AI quotes show value before commitment

Stage 4: Purchase → Credit packs (no subscriptions required)

Stage 5: Retention → Track satisfaction, offer credit top-ups

Expected Conversion Funnel:

- 1000 template downloads

- → 100 task quote requests (10%)

- → 30 confirmed tasks (30% of quotes, 3% of templates)

- → Average 3 credits per task = 90 credits sold

- → At £2.50/credit = £225 revenue

Next Steps

1. **Set up databases** in Notion using schemas above

2. **Get all API keys** (Twilio, Gemini, Supabase, Notion)

3. **Create the workflow** in n8n (I can help build this!)

4. **Upload your templates** to accessible URLs

5. **Test thoroughly** using the checklist above

6. **Launch soft** with WhatsApp Sandbox

7. **Get approved** for production WhatsApp number

8. **Monitor analytics** and iterate

Advantages of Merged System

✅ **Single workflow** = easier to maintain

✅ **Seamless UX** = user doesn't see system switches

✅ **Better conversion tracking** = know which templates lead to tasks

✅ **Unified data** = complete customer journey in Notion

✅ **Cost efficient** = one n8n workflow, not two

✅ **AI enhancement** = even templates can use AI if keywords fail

Status: Ready to build 🚀

Want me to help create the actual n8n workflow JSON?