

# Automation Title -- **Automated Invoice Lifecycle System (PDF Generation + Email Delivery + Payment Reminders + Invoice Dashboard)**

BY

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**Category - Business Operations Automation / Financial Workflow Automation**

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## **Detailed Description**

This system provides a fully automated invoicing pipeline — from invoice creation to payment reminders and dashboard tracking.

Whenever a project is marked **Completed** in Airtable, the automation instantly generates a branded PDF invoice, assigns a unique invoice number, sends it to the client via email, and stores a copy in Google Drive for record-keeping. The system also updates Airtable with invoice metadata, turning the project record into a complete financial entry.

A second automation handles follow-ups automatically. It checks every day for invoices that remain unpaid for 7 days and sends polite reminder emails to clients. This ensures timely payments without requiring any manual follow-up.

A third automation provides a real-time Airtable dashboard that visualizes outstanding balances, paid invoices, monthly revenue, and invoice statuses. This gives businesses full visibility into their financial health with zero manual reporting.

Together, the automations eliminate repetitive admin work, improve billing speed, reduce missed payments, and provide a professional, consistent client experience.

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## **What It Does**

- Automatically generates branded PDF invoices
  - Assigns unique, sequential invoice numbers
  - Sends invoices directly to the client via Gmail
  - Stores invoices in Google Drive for record-keeping
  - Updates Airtable with invoice date, payment status, and file link
  - Sends 7-day payment reminders to clients
  - Tracks payment status and due invoices
  - Visualizes revenue, paid/unpaid invoices, and outstanding totals
  - Maintains a full audit trail of all invoicing activity
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## Use Case

Ideal for:

- Freelancers
- Consultants
- Agencies
- Service-based businesses
- Anyone who sends recurring invoices and wants instant, accurate billing

The system removes manual document creation, repeated follow-ups, and inconsistent tracking — allowing business owners to focus on delivery instead of administration.

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## How It Works (Functionality Overview)

### 1. Invoice Generation

When a project is updated to **Completed** in Airtable, the automation pulls client details, project information, fees, and line items. It generates an invoice date and invoice number, fills the branded Google Docs template, exports it as a PDF, emails it to the client, stores a copy in Drive, and updates the Airtable record with all metadata.

### 2. 7-Day Payment Reminder

Every day, the system checks for invoices that:

- Have been sent
- Are still marked as Unpaid
- Are at least 7 days old
- Have not yet received a reminder

A personalized reminder email is automatically sent to each client, and the invoice record is updated to ensure no duplicate reminders are sent.

### 3. Invoice Dashboard (Airtable Interface)

A real-time financial dashboard displays:

- Total invoices issued
- Total outstanding payments
- Paid invoices this month
- Revenue by month
- A Kanban board of Paid vs Unpaid invoices
- Pie chart of invoice distribution

This gives complete financial visibility at a glance.

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## Tools Used

- **Make.com** — Automation engine running all workflows
- **Airtable** — Database + Dashboard of invoices
- **Google Docs** — Invoice template for dynamic PDF creation
- **Google Drive** — Secure invoice storage
- **Gmail** — Sends invoices and payment reminders

(Optional: Telegram/SMS integrations for additional notifications)

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## Setup Requirements

### Airtable Fields

- Client Name
- Client Email
- Project Name
- Project Description
- Service Line Items
- Project Fee / Total
- Status (Draft → In Progress → Completed)
- Invoice Number
- Invoice Date
- Invoice Sent (checkbox)
- Payment Status (Paid / Unpaid)
- Payment Reminder Sent (checkbox)
- Invoice PDF Link

### Google Docs Template

Include placeholders such as:

{{clientName}}

{{clientEmail}}

{{invoiceNumber}}

{{invoiceDate}}

{{projectName}}

{{serviceBreakdown}}

{{totalAmount}}

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## Output

- A professional PDF invoice
  - Instant delivery to client inboxes
  - Online storage with permanent backup links
  - Automatic reminders for unpaid invoices
  - Full invoice lifecycle tracked in Airtable
  - A clean dashboard visualizing all financial metrics
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## Size of Project

Medium-sized automation  
(3 workflows, 10–14 total modules)

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## Estimated Setup Time

- Template creation: 30 minutes
- Invoice scenario: 1 hour
- Reminder scenario: 30–45 minutes
- Dashboard: 20–30 minutes

**Total:** ~2–3 hours

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## Value Proposition

This system removes all manual invoice creation, reduces billing errors, ensures fast and consistent communication with clients, and improves on-time payments. Businesses that adopt automated invoicing typically benefit from:

- Faster cash flow
- Fewer missed follow-ups
- Increased professionalism
- Complete historical invoice tracking
- Significant time savings

### Estimated time saved:

10–15 minutes per invoice

20 invoices/month → 3–5 hours saved monthly

= **36–60 hours saved yearly**