

Zapier Workflow Automation Example

This is a sample workflow automation overview created for demonstration purposes. It shows how Zapier can be used to automate invoice approvals and reduce manual work in operations.

■ Workflow: Automated Invoice Approval Process

- Trigger: A new invoice is submitted via Google Form.
- Action 1: Zapier automatically saves the invoice details into a Google Sheet tracker.
- Action 2: Zapier sends a Slack notification to the Finance channel for review.
- Action 3: Manager approves or rejects the invoice via Slack reaction or linked form.
- Action 4: Approved invoices are sent to QuickBooks for payment processing.
- Action 5: Confirmation email is sent to the submitter with status update.

■ Benefits of This Workflow

- Reduces manual data entry and errors.
- Speeds up invoice approval cycle by 40%.
- Provides real-time visibility to managers via Slack notifications.
- Ensures records are centralized in Google Sheets and QuickBooks.
- Improves compliance with documented approval steps.