# The n8n Automation Cookbook

25 Ready-to-Deploy Workflows for Small Business

Lead Capture • Invoicing • CRM • Social Media • Reporting • E-Commerce

By The AI Department • Omni AI Business Services

**25 workflows** • **10 chapters** • **Node-by-node setup guides** • **Copy-paste configs**

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Chapter 1

# Why n8n? The Small Business Case for Open-Source Automation

Every small business owner knows the feeling: you spend half your day on repetitive tasks that don't generate revenue. Copying data between apps. Sending follow-up emails. Updating spreadsheets. Creating invoices. Posting on social media. These tasks are necessary, but they're eating the hours you should be spending on growth.

Automation tools like Zapier solve this — but at $69-$149/month for serious usage, the cost adds up fast. For a small business watching every dollar, that's $828-$1,788/year before you automate your first workflow.

## Enter n8n.

n8n (pronounced 'n-eight-n') is a free, open-source workflow automation platform that does everything Zapier does — and more — without the monthly bill. Self-host it on a $5/month server or use n8n Cloud starting at $24/month. Either way, you get unlimited workflows, unlimited executions, and 400+ integrations.

### The Numbers:

| Platform | Monthly | Annual |
|---|---|---|
| Zapier Pro (750 tasks/mo) | $29.99/month | $360/year |
| Zapier Team (2,000 tasks/mo) | $69.50/month | $834/year |
| Zapier Company (50K tasks) | $148.50/month | $1,782/year |
| **n8n Self-Hosted** | **$0 + $5 server** | **$60/year** |
| **n8n Cloud Starter** | **$24/month** | **$288/year** |

### What Makes n8n Different:

- **Visual workflow builder** — drag-and-drop nodes, no code required for most workflows
- **400+ integrations** — Google Sheets, Slack, HubSpot, Stripe, Shopify, Notion, Airtable, and hundreds more
- **Custom code when needed** — JavaScript or Python nodes for anything custom
- **Self-host or cloud** — your data stays on your servers if you want
- **No execution limits** — run as many automations as your server can handle
- **AI nodes built-in** — connect ChatGPT, Claude, or local LLMs directly into workflows

- **Active community** — 40,000+ community workflows you can import with one click

## Who This Cookbook Is For:

This cookbook is for small business owners, solopreneurs, and operators who want to automate their business without paying enterprise prices. You don't need to know how to code. Every workflow in this book includes step-by-step node configuration, trigger setup, and the exact settings to use. Copy the recipe. Paste it into n8n. Customize for your business. Done.

Chapter 2

# Getting Started: Installation & First Workflow

## Option 1: n8n Cloud (Recommended for Beginners)

**Step 1:** Go to n8n.io and click 'Get Started Free'

**Step 2:** Create your account (14-day free trial, no credit card)

**Step 3:** You're in. The workflow editor opens immediately.

**Step 4:** Starter plan is $24/month — unlimited workflows, 2,500 executions/month

## Option 2: Self-Host (For the Cost-Conscious)

Self-hosting n8n on a $5/month VPS (DigitalOcean, Hetzner, or Hostinger) gives you unlimited everything for the cost of a coffee. Here's the quickest path:

```
# On your VPS, run:
docker run -d --name n8n \
-p 5678:5678 \
-v n8n_data:/home/node/.n8n \
n8nio/n8n
```

That's it. Visit your-server-ip:5678 and you're running n8n. For production use, add a reverse proxy (Caddy or Nginx) and SSL — the n8n docs walk you through it in 10 minutes.

## Your First Workflow: The 5-Minute Test

Before diving into the recipes, build this simple workflow to confirm everything works:

### ■ WORKFLOW: Hello World — Webhook to Email

A simple test: when someone hits a webhook URL, you receive an email notification. Proves your n8n instance works and can connect to external services.

**Trigger:** Webhook (HTTP POST to your unique URL)

**Nodes (in order):**

→ **Webhook** — creates a unique URL that listens for incoming data

→ **Send Email** — sends you an email with the webhook payload

■ Pro Tip: Test it by pasting your webhook URL into your browser or using curl. You should get an email within seconds.

### Key Concepts (Quick Reference):

- **Node** — a single step in your workflow (trigger, action, or logic)
- **Trigger** — the event that starts your workflow (webhook, schedule, new row, etc.)
- **Credential** — saved API keys/logins for external services (stored encrypted)
- **Expression** — dynamic values using {{ $json.fieldName }} syntax
- **Execution** — one complete run of your workflow from trigger to end
- **Workflow** — the full chain of nodes from trigger to final action

Chapter 3

# Lead Capture & Contact Management

Lead capture is where most small businesses leak the most money. A form submission comes in at 2 AM, and by the time you see it at 9 AM, the prospect has already contacted your competitor. These five workflows eliminate that gap.

### ■ WORKFLOW: Website Form to CRM + Instant Email Response

When someone submits your website contact form, automatically add them to your CRM, send a personalized thank-you email, and notify your sales channel on Slack.

**Trigger:** Webhook (connected to your website form's action URL)

**Nodes (in order):**

→ **Webhook** — receives form submission data (name, email, message)

→ **Set** — formats and normalizes the data (trim whitespace, capitalize name)

→ **HubSpot / Airtable** — creates a new contact record with all form fields

→ **Send Email (SMTP)** — sends personalized 'Thanks, [Name]' email within 30 seconds

→ **Slack** — posts to #leads channel: 'New lead: [Name] — [Email] — [Message preview]'

■ Pro Tip: Add a 'Lead Score' field in the Set node based on message keywords. If someone mentions 'pricing' or 'quote', tag them as hot and @mention your sales person in the Slack message.

### ■ WORKFLOW: Facebook/Instagram Lead Ad to Google Sheets + Follow-Up

Automatically capture leads from Facebook Lead Ads, log them in a Google Sheet, and trigger a 3-email drip sequence.

**Trigger:** Facebook Lead Ads Trigger (new lead submitted)

**Nodes (in order):**

→ **Facebook Trigger** — fires when a new Lead Ad form is submitted

→ **Set** — extracts name, email, phone from the lead data

→ **Google Sheets** — appends a new row to your Leads spreadsheet with timestamp

→ **Wait** — pauses 2 minutes (so the email doesn't feel instant/automated)

→ **Send Email** — sends Email 1 of your welcome sequence

→ **Wait** — pauses 24 hours

→ **Send Email** — sends Email 2 (value-add content)

→ **Wait** — pauses 48 hours

→ **Send Email** — sends Email 3 (soft CTA to book a call)

■ Pro Tip: Use the IF node after the first email to check if the lead opened it (via email tracking). If they opened, send the CTA email sooner. If not, send a different subject line.

## ■ WORKFLOW: Business Card Scanner to CRM

Snap a photo of a business card, send it to a webhook, and let AI extract the contact details and add them to your CRM automatically.

**Trigger:** Webhook (POST with image attachment)

**Nodes (in order):**

→ **Webhook** — receives the image (from a mobile shortcut or email forward)

→ **OpenAI / Claude** — extracts name, title, company, email, phone from the image

→ **Set** — structures the extracted data into CRM-ready fields

→ **HubSpot / Airtable** — creates a new contact with all extracted details

→ **Send Email** — sends you a confirmation: 'Added [Name] from [Company] to CRM'

■ Pro Tip: Set up an iOS Shortcut or Android Tasker action that takes a photo and POSTs it to your webhook URL. One tap: photo → CRM entry.

## ■ WORKFLOW: Typeform / JotForm Survey to Segmented Email List

When a prospect fills out your qualification survey, automatically segment them into the right email list based on their answers.

**Trigger:** Typeform / JotForm new submission

**Nodes (in order):**

→ **Typeform Trigger** — fires on new survey submission

→ **Set** — extracts survey answers and scores them

→ **Switch** — routes to different paths based on score (Hot / Warm / Cold)

→ **Mailchimp / ConvertKit** — adds contact to the appropriate list/tag

→ **Slack** — notifies team for Hot leads only

■ Pro Tip: Create a simple scoring system: Budget > $5K = +3 points, Timeline < 30 days = +2 points, Decision maker = +2 points. Score 5+ = Hot, 3-4 = Warm, below = Cold.

## ■ WORKFLOW: LinkedIn Connection to CRM + Outreach Sequence

When you connect with someone on LinkedIn, automatically add them to your CRM and start a personalized outreach sequence.

**Trigger:** Schedule (every 6 hours)

**Nodes (in order):**

→ **Schedule Trigger** — runs every 6 hours

→ **HTTP Request** — checks LinkedIn connections via API/scraper

→ **IF** — filters only new connections (not already in CRM)

→ **Google Sheets** — logs new connection with profile data

→ **HubSpot / Airtable** — creates contact record

→ **Wait** — pauses 3 days (don't pitch immediately)

→ **Send Email** — sends a 'Great connecting' email referencing their role/company

■ Pro Tip: Use the AI node to generate a personalized first line based on the person's headline and company. Generic outreach gets ignored; specific outreach gets replies.

Chapter 4

# Sales & CRM Automation

Your CRM should work for you, not the other way around. These workflows eliminate data entry, ensure no deal falls through the cracks, and keep your pipeline moving without manual intervention.

### ■ WORKFLOW: Deal Stage Change → Auto-Tasks + Notifications

When a deal moves to a new stage in your CRM, automatically create tasks, send notifications, and update related records.

**Trigger:** HubSpot deal updated (stage changed)

**Nodes (in order):**

→ **HubSpot Trigger** — fires when deal stage changes

→ **Switch** — routes based on new stage (Qualified / Proposal / Negotiation / Won / Lost)

→ **Todoist / Asana** — creates stage-specific tasks (e.g., 'Send proposal by Friday')

→ **Slack** — notifies the appropriate channel with deal details

→ **IF (Won)** — triggers onboarding workflow for closed deals

→ **IF (Lost)** — tags contact for re-engagement sequence in 90 days

■ Pro Tip: For Won deals, automatically create a Google Drive folder with the client's name, copy your onboarding template docs into it, and share the folder link via email.

### ■ WORKFLOW: Stale Deal Alert → Follow-Up Reminder

Automatically flag deals that haven't been updated in 7+ days and send follow-up reminders with suggested next actions.

**Trigger:** Schedule (daily at 8:00 AM)

**Nodes (in order):**

→ **Schedule Trigger** — runs every morning at 8 AM

→ **HubSpot / Airtable** — fetches all open deals

→ **IF** — filters deals with last_activity > 7 days ago

→ **OpenAI / Claude** — generates a suggested follow-up message based on deal context

→ **Slack** — sends digest: 'X stale deals need attention' with suggested actions

→ **Send Email** — optionally auto-sends the follow-up to the prospect

■ Pro Tip: Adjust the stale threshold by deal value: $1K deals = 5 day alert, $10K+ deals = 3 day alert. Higher-value deals deserve faster follow-up.

### ■ WORKFLOW: Proposal Sent → Auto-Track + Remind

When you send a proposal via email, automatically log it in your CRM, start a follow-up timer, and track engagement.

**Trigger:** Gmail trigger (sent emails matching 'Proposal' in subject)

**Nodes (in order):**

→ **Gmail Trigger** — fires when you send an email with 'Proposal' in subject

→ **Set** — extracts recipient, subject, and attachment info

→ **HubSpot** — logs activity on the matching contact/deal record

→ **Google Sheets** — adds to Proposals Tracker (date, client, amount, status)

→ **Wait** — pauses 3 days

→ **IF** — checks if deal stage has changed (if yes, stop; if no, continue)

→ **Send Email** — sends a gentle follow-up: 'Wanted to make sure you received...'

■ Pro Tip: Attach a tracking pixel or use a service like Mailtrack. If the proposal email is opened 3+ times, that's buying intent — escalate the follow-up to a phone call reminder.

Chapter 5

# Email Marketing Automation

Email is still the highest-ROI marketing channel ($36 for every $1 spent). These workflows let n8n handle the heavy lifting so your email program runs on autopilot.

## ■ WORKFLOW: New Subscriber → Welcome Drip Sequence

When someone joins your email list, automatically send a 5-email welcome sequence over 14 days. No manual sending, no missed subscribers.

**Trigger:** Webhook or Mailchimp new subscriber trigger

**Nodes (in order):**

→ **Webhook / Mailchimp Trigger** — fires on new subscriber

→ **Send Email** — Email 1: Welcome + free resource (immediately)

→ **Wait** — 2 days

→ **Send Email** — Email 2: Your story + quick win tip

→ **Wait** — 3 days

→ **Send Email** — Email 3: Case study or social proof

→ **Wait** — 3 days

→ **Send Email** — Email 4: Common objection buster

→ **Wait** — 4 days

→ **Send Email** — Email 5: Soft pitch with limited-time offer

■ Pro Tip: Store your email templates in Google Docs. Reference them in n8n so you can edit copy without touching the workflow. Change the words, not the plumbing.

## ■ WORKFLOW: Blog Post Published → Newsletter + Social

When you publish a new blog post, automatically send it to your email list and schedule social media posts across platforms.

**Trigger:** RSS Feed trigger (checks every hour)

**Nodes (in order):**

→ **RSS Trigger** — detects new post on your blog's RSS feed

→ **OpenAI / Claude** — generates newsletter intro + 3 social media captions

→ **Mailchimp / ConvertKit** — creates and sends newsletter campaign

→ **Twitter / X** — posts tweet with blog link

→ **LinkedIn** — publishes post with professional angle

→ **Facebook** — shares to your business page

■ Pro Tip: Use the AI node to tailor the tone per platform: professional for LinkedIn, conversational for Twitter, visual-hook for Instagram. Same content, different packaging.

### ■ WORKFLOW: Re-Engagement Campaign for Inactive Subscribers

Automatically identify subscribers who haven't opened an email in 90 days and send a re-engagement sequence before cleaning your list.

**Trigger:** Schedule (every Monday at 9:00 AM)

**Nodes (in order):**

→ **Schedule Trigger** — runs weekly on Monday

→ **Mailchimp** — fetches subscribers with no opens in 90 days

→ **IF** — splits into 'never purchased' vs 'past customer'

→ **Send Email** — re-engagement email with 'We miss you' + incentive

→ **Wait** — 7 days

→ **Mailchimp** — checks if they opened the re-engagement email

→ **IF (opened)** — move back to active segment

→ **IF (not opened)** — unsubscribe and clean list

■ Pro Tip: A clean list = better deliverability = higher open rates for everyone else. Don't be afraid to unsubscribe people. A smaller, engaged list beats a large, dead one.

Chapter 6

# Social Media & Content

Consistent social media presence is a compounding asset — but it's a time vampire if done manually. These workflows keep your profiles active without you living on the platforms.

### ■ WORKFLOW: Content Calendar Auto-Publisher

Load a month of content into a Google Sheet, and n8n publishes each post at the scheduled time across all your platforms.

**Trigger:** Schedule (every 30 minutes)

**Nodes (in order):**

→ **Schedule Trigger** — runs every 30 minutes

→ **Google Sheets** — checks for posts where scheduled_time = now and status = 'ready'

→ **IF** — routes based on platform column (Twitter, LinkedIn, Facebook, Instagram)

→ **Twitter / LinkedIn / Facebook** — publishes the post with caption and image

→ **Google Sheets** — updates status to 'published' with timestamp

→ **Slack** — logs: 'Published: [platform] — [post title]'

■ Pro Tip: Batch-create a month of content in one sitting. Put it all in the spreadsheet. n8n handles the publishing schedule. You never touch social media again until next month.

### ■ WORKFLOW: Mention & Review Monitor

Monitor brand mentions across social media and review sites. Get instant alerts for negative mentions and auto-respond to positive reviews.

**Trigger:** Schedule (every 2 hours)

**Nodes (in order):**

→ **Schedule Trigger** — runs every 2 hours

→ **HTTP Request** — checks Google Alerts RSS / Twitter API / Google Business reviews

→ **OpenAI / Claude** — classifies sentiment: Positive / Neutral / Negative

→ **Switch** — routes by sentiment

→ **Slack (Negative)** — URGENT alert to #reputation channel

→ **Google Sheets** — logs all mentions with sentiment, source, and timestamp

→ **Send Email (Positive)** — auto-responds with 'Thank you' template for reviews

■ Pro Tip: Respond to negative reviews within 1 hour and you're 33% more likely to have the reviewer update their rating. Speed matters more than perfection in reputation management.

## ■ WORKFLOW: AI Content Idea Generator

Every Monday, automatically generate a week's worth of content ideas based on trending topics in your industry, past performance, and competitor analysis.

**Trigger:** Schedule (Monday at 7:00 AM)

**Nodes (in order):**

→ **Schedule Trigger** — runs every Monday at 7 AM

→ **HTTP Request** — fetches trending topics from Google Trends API / Reddit / X

→ **Google Sheets** — pulls your top 10 performing posts from the past 30 days

→ **OpenAI / Claude** — generates 7 content ideas with hooks, captions, and hashtags

→ **Google Sheets** — writes ideas to your Content Ideas sheet

→ **Slack** — posts the weekly content brief to #marketing

■ Pro Tip: Feed the AI your brand voice guide and top-performing posts as examples. The output quality jumps dramatically when it has your actual voice to reference.

Chapter 7

# Invoicing & Payments

Cash flow is the oxygen of small business. These workflows make sure invoices go out on time, payments get tracked, and nothing falls through the cracks.

### ■ WORKFLOW: Project Complete → Auto-Generate & Send Invoice

When you mark a project as complete in your project management tool, automatically generate and send the invoice.

**Trigger:** Airtable/Notion record updated (status = Complete)

**Nodes (in order):**

→ **Airtable / Notion Trigger** — fires when project status = 'Complete'

→ **Set** — pulls client name, email, project scope, and agreed price

→ **Stripe / QuickBooks** — creates an invoice with line items

→ **Send Email** — sends invoice to client with payment link

→ **Google Sheets** — logs invoice in Accounts Receivable tracker

→ **Wait** — 7 days

→ **IF** — checks if payment received (Stripe webhook / manual check)

→ **Send Email** — if unpaid, sends polite payment reminder

■ Pro Tip: Add a 2% early payment discount for invoices paid within 48 hours. Automate this by including the discount in the first email and removing it in the reminder.

### ■ WORKFLOW: Payment Received → Thank You + Receipt + Upsell

When a payment hits your Stripe account, automatically send a thank-you email, update your records, and offer a relevant upsell.

**Trigger:** Stripe payment_intent.succeeded webhook

**Nodes (in order):**

→ **Stripe Trigger** — fires on successful payment

→ **Set** — extracts customer name, email, amount, product purchased

→ **Google Sheets** — logs payment in Revenue Tracker

→ **Send Email** — sends personalized thank-you + receipt PDF

→ **Wait** — 3 days

→ **OpenAI / Claude** — generates personalized upsell suggestion based on purchase

→ **Send Email** — sends upsell email with complementary product/service

■ Pro Tip: Track your upsell conversion rate. Even a 10% upsell rate on a $200 average order adds $20 to your average customer value with zero acquisition cost.

### ■ WORKFLOW: Overdue Invoice Escalation Sequence

Automatically escalate overdue invoices from gentle reminder to firm notice, keeping you professional while ensuring you get paid.

**Trigger:** Schedule (daily at 9:00 AM)

**Nodes (in order):**

→ **Schedule Trigger** — runs daily at 9 AM

→ **Google Sheets / QuickBooks** — fetches all unpaid invoices

→ **IF** — segments by days overdue: 7 / 14 / 30 / 60

→ **Send Email (7 days)** — friendly reminder: 'Just a heads up...'

→ **Send Email (14 days)** — firm reminder: 'Your invoice is past due...'

→ **Send Email (30 days)** — final notice: 'Please remit payment immediately...'

→ **Slack (60 days)** — alerts you to take manual action or involve collections

■ Pro Tip: Never send angry emails. Keep every reminder professional and factual. Include the payment link in every message — make it easy for people to pay.

Chapter 8

# Operations & Internal Tools

The workflows nobody sees but everyone depends on. These keep your internal operations running smoothly without anyone thinking about them.

### ■ WORKFLOW: Daily Business Dashboard Digest

Every morning, automatically compile key business metrics from multiple sources into a single Slack message or email — your daily executive briefing.

**Trigger:** Schedule (daily at 7:30 AM)

**Nodes (in order):**

```
→ Schedule Trigger — runs daily at 7:30 AM
→ Stripe — fetches yesterday's revenue and transaction count
→ Google Analytics — pulls website traffic, top pages, conversion rate
→ Mailchimp — gets subscriber count and latest campaign performance
→ Google Sheets — reads pipeline value and deal count
→ Set — compiles all metrics into a formatted digest
→ Slack / Email — sends the daily dashboard: revenue, traffic, leads, pipeline
```

■ Pro Tip: Add week-over-week comparisons to spot trends early. 'Revenue: $1,240 yesterday (+15% vs last week)' is infinitely more useful than just '$1,240'.

### ■ WORKFLOW: New Employee / Contractor Onboarding Automation

When you add someone to your team roster, automatically provision their accounts, send welcome materials, and create their onboarding tasks.

**Trigger:** Airtable new record (Team sheet)

**Nodes (in order):**

```
→ Airtable Trigger — fires when new row added to Team roster
→ Google Workspace — creates email account and adds to groups
→ Slack — invites to workspace and relevant channels
→ Google Drive — shares team folder and onboarding docs
→ Todoist / Asana — creates onboarding task list (30 items over 2 weeks)
```

→ **Send Email** – sends welcome email with all access links and first-week schedule

■ Pro Tip: Build a contractor-specific version with limited access that auto-expires after the project end date. Use the Wait + Delete nodes to auto-revoke access on the last day.

### ■ WORKFLOW: Document Approval Workflow

When a team member uploads a document for approval, automatically route it to the right approver, track status, and notify when complete.

**Trigger:** Google Drive file created in 'Pending Approval' folder

**Nodes (in order):**

→ **Google Drive Trigger** – fires when file added to 'Pending Approval' folder

→ **Set** – extracts file name, uploader, and document type

→ **Switch** – routes based on document type (Contract / Proposal / Report)

→ **Slack** – sends approval request to the right person with file link

→ **Wait** – pauses until approval response received (via Slack button or webhook)

→ **Google Drive** – moves file to 'Approved' or 'Needs Revision' folder

→ **Send Email** – notifies uploader of the decision

■ Pro Tip: Add a 48-hour escalation: if no response within 2 days, remind the approver and cc their manager. Documents should never sit in limbo.

Chapter 9

# Reporting & Analytics Dashboards

Data without action is just noise. These workflows turn your scattered data into clear, actionable reports — delivered to you automatically.

### ■ WORKFLOW: Weekly Business Scorecard (Auto-Generated)

Every Friday, compile a comprehensive weekly report with revenue, marketing, sales, and operations metrics — formatted and delivered to your inbox.

**Trigger:** Schedule (Friday at 4:00 PM)

**Nodes (in order):**

- → **`Schedule Trigger`** `— runs every Friday at 4 PM`
- → **`Stripe`** `— weekly revenue, refunds, new customers`
- → **`Google Analytics`** `— traffic, bounce rate, top content, conversions`
- → **`HubSpot`** `— new leads, deals closed, pipeline changes`
- → **`Mailchimp`** `— email performance (opens, clicks, unsubscribes)`
- → **`OpenAI / Claude`** `— generates executive summary with insights and recommendations`
- → **`Send Email`** `— sends formatted HTML report to stakeholders`
- → **`Google Sheets`** `— archives metrics for historical trend tracking`

■ Pro Tip: The AI summary is the most valuable part. Prompt it to identify the #1 win, #1 concern, and #1 recommendation for next week. Three sentences that actually drive decisions.

### ■ WORKFLOW: Competitor Price Monitor

Track competitor pricing changes weekly and get alerts when they change their prices, launch new products, or run promotions.

**Trigger:** Schedule (Wednesday at 10:00 AM)

**Nodes (in order):**

- → **`Schedule Trigger`** `— runs every Wednesday`
- → **`HTTP Request`** `— scrapes competitor pricing pages (3-5 competitors)`
- → **`Set`** `— extracts current prices for tracked products`
- → **`Google Sheets`** `— compares against last week's prices`

→ **IF** — checks for price changes > 5%

→ **Slack** — alerts: 'Competitor X changed [product] price from $Y to $Z'

→ **Google Sheets** — updates price history for trend analysis

■ Pro Tip: Don't just track prices — track positioning. Use the AI node to analyze their landing pages and summarize any messaging changes. Pricing is what they charge; positioning is how they sell.

### ■ WORKFLOW: Monthly Revenue & Expense Report

On the 1st of every month, automatically generate a P&L; summary pulling data from Stripe, QuickBooks, and your expense tracker.

**Trigger:** Schedule (1st of each month at 8:00 AM)

**Nodes (in order):**

→ **Schedule Trigger** — runs on the 1st of each month

→ **Stripe** — fetches total revenue, fees, refunds for previous month

→ **QuickBooks / Google Sheets** — pulls categorized expenses

→ **Set** — calculates gross margin, net profit, MoM growth

→ **OpenAI / Claude** — generates narrative summary with key callouts

→ **Google Sheets** — adds to Annual P&L; tracker

→ **Send Email** — sends PDF-formatted report to you and your accountant

■ Pro Tip: Set up expense categories that match your tax filing structure. When tax season arrives, you already have 12 months of categorized data ready to go.

Chapter 10

# E-Commerce & Order Management

If you sell products online — digital or physical — these workflows handle the post-purchase experience that turns one-time buyers into repeat customers.

### ■ WORKFLOW: New Order → Fulfillment + Customer Journey

When a Shopify or WooCommerce order comes in, automate the entire post-purchase flow: confirmation, fulfillment tracking, review request, and repeat purchase offer.

**Trigger:** Shopify order paid webhook

**Nodes (in order):**

```
→ Shopify Trigger — fires on new paid order
→ Set — extracts order details, customer info, items purchased
→ Google Sheets — logs order in Order Tracker
→ Send Email — branded order confirmation (not the default Shopify email)
→ Wait — delivery estimate + 2 days
→ Send Email — 'How's your [product]?' + review request with direct link
→ Wait — 14 days
→ OpenAI / Claude — generates personalized product recommendation based on purchase
→ Send Email — repeat purchase offer with discount code
```

■ Pro Tip: The review request email is worth its weight in gold. Time it 2 days after expected delivery — the customer has the product, the excitement is fresh, and they haven't forgotten yet.

### ■ WORKFLOW: Abandoned Cart Recovery Sequence

When someone adds items to their cart but doesn't complete checkout, automatically send a 3-email recovery sequence.

**Trigger:** Shopify checkout abandoned event

**Nodes (in order):**

```
→ Shopify Trigger / Webhook — fires on checkout abandoned
→ Wait — 1 hour (give them time to come back naturally)
```

→ **IF** — check if order was completed in the meantime

→ **Send Email** — Email 1: 'You left something behind' + cart contents

→ **Wait** — 24 hours

→ **Send Email** — Email 2: Social proof + 'Still thinking about it?'

→ **Wait** — 48 hours

→ **Send Email** — Email 3: Time-limited 10% discount code

→ **Google Sheets** — logs recovery attempt and whether it converted

■ Pro Tip: Abandoned cart emails have a 45% open rate and recover 5-11% of lost sales. At $0 cost with n8n, this workflow pays for your entire n8n setup in one recovery.

Bonus

# The 15-Minute Weekly Automation Audit

Building workflows is step one. Keeping them healthy is step two. Spend 15 minutes every Monday reviewing your automation health — here's the checklist:

## Monday Morning Automation Audit (15 min):

- **Check execution history** (2 min) — Open n8n → Executions. Look for any red (failed) runs. Fix or note them.
- **Review error notifications** (2 min) — Check your #automation-errors Slack channel or email folder. Prioritize by impact.
- **Verify trigger health** (3 min) — Confirm all webhook URLs are still active. Check that scheduled workflows ran on time.
- **Check credential expiry** (2 min) — OAuth tokens expire. API keys get rotated. Verify all credentials still work.
- **Review metrics** (3 min) — How many leads captured this week? Invoices sent? Emails delivered? Are the numbers what you expected?
- **Identify new automation opportunities** (3 min) — What did you do manually this week that could be automated? Add it to your automation backlog.

## The Automation Health Scorecard:

| Metric | Healthy | Warning | Critical |
|---|---|---|---|
| Failed executions/week | < 2 | 2-5 | > 5 |
| Avg response time | < 30 sec | 30-120 sec | > 120 sec |
| Credential errors | 0 | 1 | > 1 |
| Missed scheduled runs | 0 | 1-2 | > 2 |
| Manual tasks automated | 80%+ | 50-80% | < 50% |

Appendix

# n8n Node Reference & Tool Comparison

## Most-Used Nodes in This Cookbook:

| Node | Category | What It Does |
|---|---|---|
| Webhook | Trigger | Listens for incoming HTTP requests |
| Schedule Trigger | Trigger | Runs workflow on a cron schedule |
| Set | Transform | Creates, renames, or reformats data fields |
| IF | Logic | Routes data based on conditions (true/false) |
| Switch | Logic | Routes data to multiple paths based on value |
| Wait | Flow | Pauses execution for a set duration |
| HTTP Request | Integration | Calls any REST API or scrapes web pages |
| OpenAI / Claude | AI | Generates text, classifies, summarizes, extracts |
| Google Sheets | Data | Reads/writes spreadsheet rows |
| Send Email (SMTP) | Comms | Sends emails via your SMTP server or Gmail |
| Slack | Comms | Posts messages to channels or DMs |
| HubSpot | CRM | Creates/updates contacts, deals, activities |
| Stripe | Payments | Creates invoices, processes payments, reads data |
| Shopify | E-Commerce | Manages orders, products, customers |

## n8n vs. Competitors (2026):

| Feature | n8n | Zapier | Make | Power Automate |
|---|---|---|---|---|
| **Pricing (serious use)** | $0-24/mo | $69-149/mo | $16-83/mo | $15-40/user/mo |
| **Self-host option** | Yes | No | No | No |
| **Workflow complexity** | Unlimited | Linear only | Advanced | Advanced |
| **Built-in AI nodes** | Yes | Limited | Yes | Limited |
| **Custom code support** | JS + Python | JS only | Limited | Limited |
| **Community workflows** | 40,000+ | 6,000+ | 10,000+ | 3,000+ |
| **Open source** | Yes (fair-code) | No | No | No |

| | | | | |
|---|---|---|---|---|
| **Error handling** | Advanced | Basic | Advanced | Basic |
| **Best for** | Technical SMBs | Non-technical | Mid-market | Microsoft shops |

### Recommended AI Tools for n8n Workflows:

- **OpenAI API (GPT-4o)** — best for general text generation, classification, and extraction
- **Anthropic Claude API** — best for long-context analysis, nuanced writing, and complex reasoning
- **Google Gemini** — best for multimodal tasks (image + text) and Google ecosystem integration
- **Groq** — fastest inference for real-time workflow responses (Llama/Mixtral models)
- **Ollama (local)** — free, private AI for self-hosted n8n setups (no API costs)

## What's Next?

You now have 25 ready-to-deploy workflows covering every major business function. Start with the one that saves you the most time this week. Build it. Test it. Let it run for a week. Then add the next one.

Automation compounds. The first workflow saves you 2 hours/week. The fifth saves you 10. By the time you've built all 25, your business runs itself while you focus on growth.

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