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n8n Workflow Starter Templates

8 ready-to-adapt workflow patterns for the automations most businesses build first — with the exact node sequence for each, built for n8n.

A free template pack from The Nexa Solutions · thanexasolutions.com

How to Use These Templates

Each template below shows a proven node sequence for n8n (n8n.io), the open-source workflow automation tool. They're written to be adapted, not copied exactly — your specific apps, fields, and business logic will differ, but the overall shape of each workflow holds up across most businesses that need it.

Each template shows: the trigger that starts it, the sequence of nodes in order, and a customization note for the most common ways businesses adapt it. If you're new to n8n, build each workflow in a test environment first and confirm every step with sample data before connecting it to real customer data.

A note on AI nodes

Several templates below use an "AI Agent / LLM" node for judgment-based steps (classifying, drafting, extracting details). In n8n this is typically the OpenAI node, the Anthropic node, or the generic AI Agent node, connected to whichever model provider you use.

TEMPLATE 1

New Lead Notification

Instantly notify the right person when a new lead comes in, instead of relying on someone checking an inbox.

1	Webhook	Receives the form submission the moment it’s sent.
2	IF	Checks which product/service the lead is interested in, to branch by owner.
3	Set	Formats the lead’s details into a clean, readable message.
4	Slack / Gmail	Sends the formatted notification to the right person or channel.
5	Google Sheets / CRM node	Logs the lead as a permanent record, independent of the notification.

Trigger: A new submission on your website contact form or landing page.

Customize it: Add a second IF branch to route by lead value (budget field) to different people or channels.

TEMPLATE 2

Lead-to-CRM Sync

Automatically create a CRM record from every form submission, with zero manual data entry.

1	Webhook / Google Sheets Trigger	Captures the new lead data as it arrives.
2	Set	Maps the incoming fields to your CRM's expected field names.
3	HTTP Request / CRM node	Creates the contact and deal record in your CRM via its API.
4	IF	Checks whether the contact already exists to avoid duplicates.
5	Slack	Confirms the sync succeeded, or alerts if the CRM call failed.

Trigger: A new form submission or a new row in a shared spreadsheet.

Customize it: Use the CRM's native n8n node (HubSpot, Pipedrive, etc.) instead of a raw HTTP Request node when one is available — it handles authentication for you.

TEMPLATE 3

Order Fulfillment Update

Keep inventory, fulfillment, and the customer all updated automatically the moment an order comes in.

1	Webhook	Receives the new order event in real time.
2	Google Sheets / Airtable	Updates the inventory count for each ordered item.
3	IF	Checks stock level and flags low-inventory items.
4	Slack	Notifies the fulfillment team with the order details.
5	Gmail / Email node	Sends the customer an order confirmation with tracking info once available.

Trigger: A new order webhook from your e-commerce platform (Shopify, WooCommerce, etc.).

Customize it: Add a delay + a second email node later in the flow to send a shipping confirmation once fulfillment marks it as shipped.

TEMPLATE 4

Support Ticket Triage

Automatically categorize and route incoming support emails instead of a shared inbox free-for-all.

1	**Email Trigger (IMAP)**	Watches the support inbox for new messages.
2	**AI Agent / LLM node**	Classifies the message by topic and urgency (billing, technical, general).
3	**Switch**	Routes to a different path based on the AI's classification.
4	**Slack**	Posts the ticket into the right team channel with the AI's summary.
5	**Helpdesk node (Zendesk/Freshdesk)**	Creates or updates the ticket record with the assigned category.

Trigger: A new email arriving in your support inbox.

Customize it: Start the AI Agent node with a strict instruction to only choose from your exact category list, to keep routing consistent.

TEMPLATE 5

Daily Reporting Digest

Compile a daily or weekly summary from multiple sources without anyone manually pulling numbers.

1	**Schedule Trigger**	Kicks off the workflow at a fixed time.
2	**Google Sheets / HTTP Request (x2–3)**	Pulls the latest numbers from each relevant source (sales, leads, tickets).
3	**Merge**	Combines the separate data pulls into one dataset.
4	**Set / Function**	Formats the combined data into a readable summary.
5	**Slack / Gmail**	Sends the finished digest to the team.

Trigger: A scheduled time each day or week (e.g. 8am on weekdays).

Customize it: Add a Code node to calculate week-over-week percentage changes so the digest shows trend, not just raw numbers.

TEMPLATE 6

Review Request Automation

Ask happy customers for a review at the right moment, automatically, without anyone remembering to do it.

1	**Webhook / Helpdesk node**	Detects the order-delivered or ticket-closed event.
2	**Wait**	Delays sending for a few days, so the request lands after the customer has had time to use the product.
3	**IF**	Skips the request if the order was returned or the ticket was a complaint.
4	**Gmail / Email node**	Sends the review request with a direct link to leave feedback.

Trigger: An order is marked delivered, or a support ticket is closed.

Customize it: Route negative pre-screened responses (via a quick 1-click rating) to a private follow-up instead of a public review link.

TEMPLATE 7

Meeting Follow-Up

Never let a sales or discovery call go without a timely, consistent follow-up.

1	Calendar Trigger	Detects that a scheduled meeting has just ended.
2	AI Agent / LLM node	Drafts a personalized follow-up email based on the meeting notes provided.
3	Gmail (Draft)	Creates the email as a draft rather than sending automatically, for a human to review.
4	Wait	Waits a set number of days before the next step.
5	IF	Checks whether the prospect has replied; if not, triggers a second, lighter follow-up.

Trigger: A calendar event marked as completed, or a webhook from your scheduling tool.

Customize it: Keep the first AI-drafted email as a draft, not an auto-send, until you've reviewed enough of them to trust the tone.

TEMPLATE 8

Invoice Payment Reminder

Make sure overdue invoices get a timely, consistent reminder without manual tracking.

1	Schedule Trigger	Runs once a day to check for overdue invoices.
2	HTTP Request / Accounting node	Pulls the list of unpaid invoices past their due date.
3	IF	Filters to invoices overdue by a specific number of days (e.g. 3, 7, 14).
4	Gmail / Email node	Sends a reminder email matched to how overdue the invoice is.
5	Slack	Notifies accounts receivable of invoices overdue by more than 30 days for manual follow-up.

Trigger: A scheduled daily check against your invoicing system.

Customize it: Use three separate IF branches (3, 7, 14+ days) so the tone of the reminder can escalate appropriately.

How The Nexa Solutions can help

If one of these workflows needs to handle more complexity than a template can — multiple systems, custom business logic, or an AI agent that needs real reliability — we build and maintain custom automations for growing businesses. Visit thanexasolutions.com/contact to book a free consultation.