

# N8N Import & Setup Guide

## Greg's Receipt to Expense Tracker Workflow

# One-Click Import Ready!

Import JSON → Configure IDs → Activate → Done!

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### What You Have

**File:** Greg\_Receipt\_Workflow\_N8N.json

#### Complete 12-node workflow:

1. Google Drive Trigger (watches /Receipts folder)
2. Download Receipt File
3. Convert to Base64
4. GPT-4o Extract Receipt Data (YOUR 8 categories)
5. Parse AI Response
6. Add to Notion Expense Tracker
7. Check If Monday
8. IF Monday (branching logic)
9. Get Last Week Expenses (if Monday)
10. Calculate Weekly Summary
11. Create Todoist Weekly Task
12. Create Todoist Daily Task

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### Before You Import

#### Step 1: Get Your IDs (10 minutes)

##### A. Notion Database ID:

1. Open your **Subscription Expense Tracker** in Notion
2. Click "Share" button → "Copy link"
3. URL looks like: `https://notion.so/XXXXX?v=YYYYY`

4. Copy the `XXXXX` part (that's your database ID)
5. Save it!

#### **B. Google Drive Folder ID:**

1. Create folder "Receipts" in Google Drive
2. Open the folder
3. URL looks like: `https://drive.google.com/drive/folders/XXXXX`
4. Copy the `XXXXX` part
5. Save it!

#### **C. Todoist Project ID:**

1. Open Todoist → Create project "Expense Reviews"
2. Click project settings (gear icon)
3. Look for Project ID or copy from URL
4. Save it!

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## Import Into N8N

### **Step 2: Import Workflow (2 minutes)**

1. **Open N8N** in your browser
2. Click **"Workflows"** → **"Import from File"**
3. **Select:** `Greg_Receipt_Workflow_N8N.json`
4. **Workflow appears** with all 12 nodes connected!

### **Step 3: Configure Credentials (5 minutes)**

The workflow needs 4 credentials:

#### **A. Google Drive OAuth2:**

- N8N → Credentials → Add → Google Drive OAuth2
- Follow Google auth flow
- Save

#### **B. OpenAI API:**

- N8N → Credentials → Add → OpenAI
- Paste your API key from `platform.openai.com`
- Save

### **C. Notion API:**

- N8N → Credentials → Add → Notion API
- Get Integration Token from [notion.so/my-integrations](https://notion.so/my-integrations)
- Paste token
- Save
- **IMPORTANT:** Share your database with integration!

### **D. Todoist API:**

- N8N → Credentials → Add → Todoist
- Get API token from [todoist.com/prefs/integrations](https://todoist.com/prefs/integrations)
- Paste token
- Save

## Step 4: Replace Placeholder IDs (3 minutes)

Open each node and replace these placeholders:

### Node 1 (Google Drive Trigger):

- Replace: REPLACE\_WITH\_YOUR\_RECEIPTS\_FOLDER\_ID
- With: Your Google Drive folder ID

### Node 6 (Add to Notion):

- Replace: REPLACE\_WITH\_YOUR\_NOTION\_DATABASE\_ID
- With: Your Subscription Expense Tracker database ID

### Node 9 (Get Last Week Expenses):

- Replace: REPLACE\_WITH\_YOUR\_NOTION\_DATABASE\_ID
- With: Same database ID as above

### Node 11 (Todoist Weekly Task):

- Replace: REPLACE\_WITH\_YOUR\_TODOIST\_PROJECT\_ID
- With: Your Todoist project ID

### Node 12 (Todoist Daily Task):

- Replace: REPLACE\_WITH\_YOUR\_TODOIST\_PROJECT\_ID
- With: Same Todoist project ID

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## ✅ Test the Workflow

### Step 5: Test Execution (5 minutes)

1. **Don't activate yet!** (we want to test first)
2. **Upload a test receipt** to your Google Drive /Receipts folder
3. **In N8N:** Click "Execute Workflow" button (play icon)
4. **Watch it run:**
  - ✓ File downloaded
  - ✓ AI extracted data
  - ✓ Category matched (Application, Website, etc.)
  - ✓ Added to Notion
  - ✓ Todoist task created
5. **Check results:**
  - Open Notion → See new entry

- Open Todoist → See new task
- All fields populated correctly?

6. **If successful:** Activate the workflow!

## Notion Database Mapping

The workflow adds data to these exact fields:

### Subscription Expense Tracker Fields:

Notion Field	Source	Example
<b>Subscription</b> (Title)	AI: vendor	"Whole Foods"
<b>Category</b> (Select)	AI: category	"Application"
<b>Cost</b> (Number)	AI: amount	87.43
<b>Billing</b> (Select)	AI: billingCycle	"one time"
<b>Date</b> (Date)	AI: date	2026-03-13
<b>Notes</b> (Text)	AI: notes + " (Auto-added)"	"Groceries (Auto- added from receipt)"

Make sure your Notion database has these exact field names!

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## What Happens Daily

### Every Receipt Upload:

1. **You:** Upload receipt to Google Drive /Receipts
2. **N8N:** Detects new file (within 5 min)
3. **AI:** Extracts vendor, amount, category, etc.
4. **Notion:** New row added to your Expense Tracker
5. **Todoist:** Task created showing what was added

### Every Monday 9 AM:

1. **N8N:** Checks "Is it Monday?"
2. **Notion:** Queries last week's expenses
3. **Calculate:** Total, average, top category, breakdown
4. **Todoist:** Creates weekly review task with full summary

## Troubleshooting

### Issue: "Can't find database"

#### Solution:

1. Check database ID is correct
2. Make sure you **shared** the database with your Notion integration
3. In Notion → Database → Share → Add your integration

### Issue: "Category not found"

#### Solution:

1. Check your Category field in Notion
2. Make sure these EXACT options exist:
  - Application
  - Website
  - Cloud
  - Housing
  - Utilities
  - Equipment
  - Software
  - Other
3. Capitalization matters!

### Issue: "GPT-4o not available"

#### Solution:

1. Check OpenAI API key is valid
2. Verify your account has GPT-4o access
3. Check API usage limits not exceeded

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## Expected Costs

Per Receipt:

- GPT-4o Vision API call: ~\$0.02-0.03
- Notion API calls: Free
- Todoist API calls: Free

**Monthly (50 receipts):**

- Total cost: ~\$1-2 in AI fees
- Time saved: 3+ hours

**Annual:**

- AI costs: ~\$12-24
- Time saved: 36+ hours
- Value: Priceless organization!

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 **You're Ready to Import!**

1. Import JSON file into N8N
2. Add 4 credentials
3. Replace 5 placeholder IDs
4. Test with one receipt
5. Activate and go live!