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AI AUTOMATION ENGINEER

CLIENT ONBOARDING PACK

Sales pipeline stage automation and nudges

Sales automation, built on n8n and handed over to you.

Everything you need to know before this is built for you: what it does, which accounts you open, what it really costs to run, and exactly what you get at handover. Read once and you should not need to ask a single setup question.

Runs when another workflow calls it · 3-5 days to build · you own everything

3-5 days

TYPICAL BUILD TIME

132

PROVEN VARIANTS IN
OUR LIBRARY

8

ACCOUNTS YOU NEED

\$350+

TYPICAL PROJECT
PRICE



START HERE

The 60-second version

Everything you need to know before this is built for you: what it does, which accounts you open, what it really costs to run, and exactly what you get at handover. Read once and you should not need to ask a single setup question.

WHAT YOU GET

Sales pipeline stage automation and nudges, running on your own server.

A working automation you own outright, on a schedule you choose, with the workflow file exported so you can back it up or move it.

WHAT IT REPLACES

Manual, repetitive work.

The task this removes is the kind that is done the same way every time, which is exactly the kind a machine should be doing instead of a person.

WHAT YOU OWN

Your server, your accounts, your keys, your workflow file.

Nothing is locked to me. There is no licence to renew and no per-item cut. If we never speak again, it keeps running.



BEFORE ANYTHING ELSE

How I work, and why it protects you

TRANSPARENCY

You see the real numbers

I would rather tell you a run costs a few cents and lose the order than promise it is free and hand you a bill you did not expect. Every cost in this guide is arithmetic you can check against the provider's own dashboard.

OWNERSHIP

Nothing is locked to me

Your server, your accounts, your API keys, your workflow file. I host nothing on your behalf and there is no licence to renew. If we never speak again, it keeps running.

HONESTY ABOUT LIMITS

I will tell you when something is a bad idea

If what you are asking for will disappoint you, you hear that before you spend the money, not after. That includes telling you when an automation is the wrong tool.

AFTER DELIVERY

I answer questions once the order closes

A workflow you cannot operate is not a delivery. I would rather spend ten minutes explaining it than have it sit unused.

ORDER THROUGH FIVERR, ALWAYS

Keep everything on the platform — the order, the messages, the files and the payment. That is what gives you buyer protection, a paper trail and recourse if you are ever unhappy. If anyone messages you off-platform claiming to be me, it is not me. I will never ask you to pay outside Fiverr.



HOW IT WORKS

The pipeline, stage by stage

Each stage hands its output to the next. Understanding this is what makes the costs in Section 4 make sense.

1

It starts when another workflow calls it

No one has to remember to run it. The trigger is the only part that changes if you later want it to fire differently.

2

The result is written where you already work

Into the tools listed in Section 3, so nobody has to learn a new interface.

3

Failures are caught and reported

A run that fails tells you why rather than failing silently. Silent breakage is the only kind that really costs you.

WORKING EXAMPLES WE BUILD FROM

- Hubspot Splitout Create Webhook
- Smartlead Campaign & HubSpot Data Sync
- Automated HubSpot Deal Assignment
- Asignacion Deal Hubspot
- Lead Capture & CRM Enrichment Automation

Every one of these is a real workflow in our library, and their node structure has been read directly.



What the workflow is made of

A representative build from our library uses these steps:

executeWorkflowTrigger filter gmail googleCalendarTool httpRequest hubspot hubspotTrigger if markdown noOp set splitOut stickyNote webhook

Read directly from the workflow files themselves, so this is what these builds actually contain rather than what they are described as containing.

LIBRARY EVIDENCE

132 matching workflows

This automation is not being invented for you. There are 132 distinct workflows in our library that solve this problem, and 113 of them have been read at the node level. Your build starts from that body of work rather than from a blank canvas.

SIZE

Around 11 steps

That is the median for this class of automation. It is a useful proxy for how much can go wrong, which is why the error handling matters as much as the happy path.

WHY YOU ARE NOT JUST HANDED A TEMPLATE

A library file assumes someone else's tools, someone else's field names and someone else's judgement about what "good" means. Importing one and hoping is how people end up with an automation they cannot trust. The library is where I start; your build is what you get.



How you actually use it

Once it is live your involvement is small and deliberate. You add work at one end or let the trigger do it for you, and you review results where you already work.

1 You add the work, or the trigger does

It runs when another workflow calls it. Nothing has to be remembered.

2 The system does the repetitive part

The step that used to need a person to read something and decide is the step that is now automated. That is the whole point of it.

3 You review what came out

In the tools you already use. For the first few weeks I recommend reviewing everything; after that most clients spot-check.

4 You get told when something fails

A failure alerts you with the reason. Silent breakage is the only kind that really costs you, so it is designed not to happen.

HOW MUCH OF YOUR TIME THIS NEEDS

During the build: two short checkpoints, a few minutes each. After handover: as much or as little review as you want. The automation does not need supervision to keep running, and it does not stop working if you ignore it for a fortnight.



The accounts you need to open

Only these. Nothing else, and nothing that needs your personal passwords.

ACCOUNT	WHAT IT IS FOR	WHAT IT COSTS
n8n (self-hosted) https://cloud.autogineer.com	The automation engine everything runs on.	VPS with the n8n one-click app: \$5.99–\$20.99/month, cheapest on a 12-month term.
HubSpot https://hubspot.com	CRM the automation writes leads and notes into.	Free CRM tier is genuinely usable; paid hubs scale steeply.
Pipedrive https://pipedrive.com	Sales-first CRM, common with small teams.	Per user per month.
Gmail / Google Workspace https://workspace.google.com	Reading and sending mail inside the automation.	Free with a personal account; Workspace is per user per month.
Slack https://slack.com	Where alerts, reports and internal AI assistants land.	Free plan works for automation; paid plans add history and apps.
OpenAI https://platform.openai.com	Text generation, classification, extraction and embeddings.	Pay-as-you-go per token. A short classification call costs a fraction of a cent; a 1,500-word article is typically a few cents.
Stripe https://stripe.com	Payments, subscriptions and payout events.	Per-transaction percentage plus a fixed fee; no monthly fee.
Zendesk / Freshdesk / Intercom https://zendesk.com	The helpdesk the automation triages, tags and replies inside.	Per agent per month; all three are mid-market priced.

Prices for Pipedrive, OpenAI, Zendesk / Freshdesk / Intercom move often. Those are the ones to re-check on the vendor's own pricing page before you commit — I would rather you check than take my word for a number that changed.

THE ONE RULE THAT MATTERS MOST

Register with an email address and a password. Do not use "Continue with Google", Apple or GitHub.

A Google-linked account can only be opened by someone holding your Google password — which is your email, your files and your identity. I will never ask for that. An email-and-password account gives me that one dashboard and nothing else, and you can change the password the minute I hand over.



ACCOUNT 1 OF 8

n8n (self-hosted)

The automation engine everything runs on. In this automation it is the piece that makes the difference between a demo and something you can actually run every day.

<https://cloud.autogineer.com>

WHAT IT COSTS

VPS with the n8n one-click app: \$5.99–\$20.99/month, cheapest on a 12-month term.

FREE TIER

None — it is a server.

Self-hosting means no per-workflow or per-execution fee.

OPENING IT, CLICK BY CLICK

1

Open the hosting console and register

Use your email address and a password. Pick a strong one you have not used elsewhere — you will be sharing it with me and changing it the moment I hand over.

2

Choose a plan and a 12-month term

The 12-month term is both the cheapest per month and the safe choice: if a monthly plan lapses the server is suspended and its data goes with it, and rebuilding is not covered by the original order.

3

In the one-click app list, select n8n

This is the important click. It installs and configures n8n on a clean HTTPS domain instead of leaving you with a bare Linux box.

4

Name the server and set a root password

The root password is what I use over SSH to install the extras this automation needs. Note it exactly as typed.

5

Open the n8n URL once and create the owner account

Do it yourself so the account is genuinely yours, then send me those details — or leave it untouched and I will set it up.

WORTH KNOWING BEFORE YOU START

Register with email + password. Choose the n8n one-click app, not a bare Linux box. Buy 12 months: if a monthly plan lapses the server is suspended and its data goes with it.



CRM the automation writes leads and notes into. In this automation it is the piece that makes the difference between a demo and something you can actually run every day.

<https://hubspot.com>

WHAT IT COSTS

Free CRM tier is genuinely usable; paid hubs scale steeply.

FREE TIER

Yes.

OPENING IT, CLICK BY CLICK

1

Open your HubSpot settings

The free CRM tier is enough for this.

2

Create a private app with scoped permissions

Rather than a personal key, so it survives staff changes and can be scoped.

3

Copy the access token

Send it with the name of the pipeline to write into.

WORTH KNOWING BEFORE YOU START

Create a private app with scoped permissions rather than using a personal key.



Sales-first CRM, common with small teams. In this automation it is the piece that makes the difference between a demo and something you can actually run every day.

<https://pipedrive.com>

WHAT IT COSTS

Per user per month.

FREE TIER

Trial only.

OPENING IT, CLICK BY CLICK

1

Create a dedicated automation user

API tokens in Pipedrive are per user, so a dedicated user means the automation keeps working when someone leaves.

2

Copy that user's API token

From their personal preferences.

WORTH KNOWING BEFORE YOU START

API token is per user — create a dedicated automation user so it survives staff changes.

Pricing here moves often enough that you should confirm it on the vendor's own page before committing. I would rather you check than take a number from me that changed last month.



ACCOUNT 4 OF 8

Gmail / Google Workspace

Reading and sending mail inside the automation. In this automation it is the piece that makes the difference between a demo and something you can actually run every day.

<https://workspace.google.com>

WHAT IT COSTS

Free with a personal account; Workspace is per user per month.

FREE TIER

Yes.

OPENING IT, CLICK BY CLICK

1

Decide which mailbox this works on

A dedicated address is cleaner if you would rather the automation never touch your personal inbox.

2

Grant access through the consent screen

OAuth. I never see or need your Google password.

3

Tell me what it may and may not send

Whether it drafts for your approval or sends directly is your call, and drafts are the safer default for the first few weeks.

WORTH KNOWING BEFORE YOU START

Connected by OAuth. Never ask for the client's Google password — Google's own consent screen handles it, and access can be withdrawn from their security settings at any time.



ACCOUNT 5 OF 8

Slack

Where alerts, reports and internal AI assistants land. In this automation it is the piece that makes the difference between a demo and something you can actually run every day.

<https://slack.com>

WHAT IT COSTS

Free plan works for automation; paid plans add history and apps.

FREE TIER

Yes.

OPENING IT, CLICK BY CLICK

1

Confirm you can install apps in the workspace

If you are not an admin, this needs someone who is — worth checking before we start rather than on day three.

2

Create an app in your own workspace

I will tell you the exact scopes. They are the minimum the automation needs and nothing more.

3

Install it and copy the bot token

Send me the token and the channel it should post to.

WORTH KNOWING BEFORE YOU START

Needs a Slack app with bot scopes in the client's own workspace.



Text generation, classification, extraction and embeddings. In this automation it is the piece that makes the difference between a demo and something you can actually run every day.

<https://platform.openai.com>

WHAT IT COSTS

Pay-as-you-go per token.

A short classification call costs a fraction of a cent; a 1,500-word article is typically a few cents.

FREE TIER

No meaningful free tier — a prepaid balance is required.

OPENING IT, CLICK BY CLICK

1

Register with email and password

Not "Continue with Google". You are going to share this dashboard with me and revoke it afterwards.

2

Add a small prepaid balance

Start with the minimum. This automation will not spend much, and you can always top up.

3

Create an API key and copy it immediately

It is shown once. If you lose it, delete it and make another — no harm done.

4

Set a monthly spend limit

Just above your expected usage. This is the single best protection against a surprise bill, and it takes ten seconds.

WORTH KNOWING BEFORE YOU START

Register with email + password. Set a monthly spend cap just above expected usage.

Pricing here moves often enough that you should confirm it on the vendor's own page before committing. I would rather you check than take a number from me that changed last month.



Stripe

Payments, subscriptions and payout events. In this automation it is the piece that makes the difference between a demo and something you can actually run every day.

<https://stripe.com>

WHAT IT COSTS

Per-transaction percentage plus a fixed fee; no monthly fee.

FREE TIER

No fee until money moves.

OPENING IT, CLICK BY CLICK

1

Open your Stripe dashboard

You already have this if you take payments.

2

Create a **RESTRICTED** key, not a secret key

Restricted to only the permissions the automation needs. A full secret key can do anything to your account.

3

Note that I will register a webhook

An unregistered webhook is how "paid but not provisioned" happens, so this step is not optional.

WORTH KNOWING BEFORE YOU START

Use a restricted API key with only the permissions the workflow needs. Register the webhook — an unregistered webhook is how 'paid but not provisioned' happens.



ACCOUNT 8 OF 8

Zendesk / Freshdesk / Intercom

The helpdesk the automation triages, tags and replies inside. In this automation it is the piece that makes the difference between a demo and something you can actually run every day.

<https://zendesk.com>

WHAT IT COSTS

Per agent per month; all three are mid-market priced.

FREE TIER

Trials only.

OPENING IT, CLICK BY CLICK

1

Create a dedicated automation agent

So automated replies are attributable and you can see at a glance what the machine did versus what a person did.

2

Create an API token

Scoped to that agent.

3

Send me the subdomain, the agent email and the token

That is the set.

WORTH KNOWING BEFORE YOU START

Create an API token scoped to a dedicated automation agent so replies are attributable.

Pricing here moves often enough that you should confirm it on the vendor's own page before committing. I would rather you check than take a number from me that changed last month.



Three realistic scenarios

Not one number pretending to be universal. Which row you land in depends on how much you actually process, and you will know within a week.

SCENARIO	WHAT IT ASSUMES	RUNNING COST
Trying it out A handful of items a week	Server on the entry plan, providers on their free or minimum tiers.	\$6–\$12/month
Running it properly Daily use, one business	Server on the recommended plan, modest AI and data usage.	\$15–\$45/month
Running it hard High volume or several brands	Larger server, real AI spend, paid tiers where free ones cap out.	\$50–\$150/month

MY FEE

\$350–\$900, once

Paid on Fiverr for the build. No subscription to me, no licence, no per-item cut, no renewal. If we never speak again it keeps running.

THE ALTERNATIVE

What this replaces

Price this against the hours it removes every week, not against another freelancer's quote. That is the comparison that decides whether it was worth it.

HOW A SURPRISE BILL ACTUALLY HAPPENS

It happens when nobody sets a cap. Every provider in this guide either takes a prepaid balance or lets you set a hard monthly limit, and I set those with you during the build. That single step is why I can promise there will be no shock.



STEP 2 OF 3

What it really costs

The server is the only fixed monthly cost. Everything else is pay-as-you-go and scales with how much you actually process — stop using it and the variable cost stops.

ONE-TIME

My build fee

\$350–\$900 depending on scope. Paid once, on Fiverr. No subscription to me, no licence, no per-item cut, ever.

FIXED MONTHLY

Your server

\$5.99–\$20.99/month, cheapest on a 12-month term. Unaffected by how much you run.

VARIABLE

AI and data usage

Pay only for what you process. Set a spending cap on each key just above your normal usage.

ZERO

What I charge afterwards

Nothing. There is no retainer and no renewal. Questions after delivery are answered anyway.

WHY I WILL NOT GIVE YOU A SINGLE MONTHLY FIGURE

Because it would be a guess dressed as a fact. Your real bill depends on how much you process, and the honest number comes from your own first week of usage — which every provider above shows you in its own dashboard. What I can promise is that there is no cost from me after the build, and no provider here bills you without a prepaid balance or a cap you set yourself.



WHAT I NEED FROM YOU

Your brief — copy this into Fiverr chat

This is what I need in writing before I start. It takes ten minutes and it is the difference between something that fits your business and something generic.

1 Your website or business, in two or three sentences

In your own words. It shapes tone more than anything else you send me.

2 Who this is for

The people on the receiving end. "Small e-commerce owners who handle their own marketing" is useful; "everyone" is not.

3 What good output looks like to you

One or two real examples of the result you want. This is the single most useful thing you can give me.

4 What must never happen

Claims you cannot legally make, competitors you will not mention, topics that are off-limits, phrasing you hate.

5 Volume

Roughly how many per day or week. This drives your running cost more than any other single answer.

6 Where the result should land

Which tool, which folder, which channel, which person.

7 Live, or held for your approval?

I recommend holding for approval for the first week or two, then switching to live once you trust it.

BRIEFS I CAN BUILD FROM IMMEDIATELY

Specific beats complete

- A real example of the output you want
- A named audience
- A volume figure, even a rough one
- The one thing that must never happen

BRIEFS THAT COST US BOTH TIME

These come back as questions

- "You are the expert, you decide"
- "Same as my competitor but better"
- "Automate everything"
- No examples and no constraints



SENDING IT TO ME

Copy this, fill it in, send it

Paste it into the Fiverr chat, or save it as a text file and attach it to the order. Leave out anything that does not apply.

1. n8n (self-hosted)

Hosting login email : _____
Hosting password : _____
Server / n8n URL : _____
Server root password : _____
n8n owner login : _____
n8n owner password : _____

2. HubSpot

Private app token : _____
Pipeline name : _____

3. Pipedrive

API token : _____

4. Gmail / Google Workspace

Mailbox address : _____
Draft only, or send directly?: _____

5. Slack

Workspace URL : _____
Bot token : _____
Channel to post to : _____

6. OpenAI

Login email : _____
Login password : _____
API key : _____
Balance topped up : _____

7. Stripe

Restricted API key : _____

8. Zendesk / Freshdesk / Intercom

Subdomain : _____
Agent email : _____
API token : _____

BEST WAY TO SEND

Fiverr chat or an attached file

Fiverr messages are private to the two of us and there is a permanent record. Most clients just paste it into the chat.

MOST SECURE

A one-time secret link

A self-destructing note that expires after one read, with the link sent over Fiverr. If you would prefer that, just say so.



What I never ask for, and what happens to your keys

I WILL NEVER ASK FOR ANY OF THESE

WHAT	WHY NOT
Your personal Google, Apple or Microsoft password	Never justified. Google's own consent screen grants exactly the access I need and you can withdraw it at any time without changing your password.
Your card or bank details	You pay each provider directly. Money never passes through me except the Fiverr order itself.
Your Fiverr password	No legitimate reason exists. Anyone asking is attempting to steal your account.
Your identity documents	Not needed for any part of this work.
Access to unrelated systems	Your other sites, your accounting, your CRM if this automation does not touch it — none of it is in scope.
Payment outside Fiverr	It removes your buyer protection and it is against Fiverr's terms. I will not do it.

WHAT HAPPENS TO YOUR CREDENTIALS WHILE I HOLD THEM

WHERE THEY LIVE

In the Fiverr conversation and my local notes

For the duration of the build, and nowhere else. They are used only to build, configure and test your workflow.

WHO SEES THEM

Only me

I work alone on these builds. No subcontractors, no team, no shared credential store.

AFTERWARDS

Deleted once you have rotated

I delete my local copy when the order completes and you confirm you have rotated your keys. After that, nothing I ever saw is still valid.

YOUR SPEND

Auditable to the cent

Every call I make during testing appears in your own provider dashboards with its cost. You can audit every cent I spend, and I will never use your balance for anything but your own workflow.

IF YOU WOULD RATHER I NEVER SEE A PASSWORD

A legitimate preference, and I can work with it. The alternative is a screen-share session where you stay at the keyboard, I direct, and you enter every credential yourself. It takes longer overall because I cannot investigate failures on my own time, but plenty of clients consider that a fair trade. Tell me before you start.

ROTATE EVERYTHING WHEN WE ARE DONE

Create a new key on each provider, paste it into the workflow — about sixty seconds and I will show you exactly where — then delete the old one. Change the passwords and the server root password, and turn on two-factor authentication. I am telling you to lock me out. Any contractor who resists that is telling you something about their business model, and the automation does not depend on my access: it runs on your server, under your keys.



From your credentials to a running system

1 Same day — I confirm I have everything

I check every credential works and read your brief. If something is missing or a login fails you hear from me within a few hours. Nothing is worse than a build stalling silently on day three because a password had a typo.

2 Day 1 — server preparation

I connect over SSH, install what this automation needs beyond stock n8n, harden the basics and confirm the public address responds. This is the invisible plumbing everything later depends on.

3 Days 1–2 — the first real output

I wire the core path and produce a small amount of real output for you to look at. **This is your first checkpoint.** Tell me what you like and what you do not, before I build the rest around it.

4 Building the full workflow

Error paths, retry handling and rate-limit pacing are built in rather than bolted on. A run that fails tells you why.

5 End-to-end testing, including the failures

I run the whole thing repeatedly and deliberately break it — what happens when a provider times out, when a balance runs low, when the input is malformed. Then I hand you finished output for approval.

6 On your approval — live, then handover

The schedule is switched on. You get the walkthrough, the exported workflow file, and the key-rotation routine. Delivered on the order.

ON TIMELINES, HONESTLY

The delivery time on your Fiverr order is the commitment; the days above are the typical shape of the work, not a second promise. The one thing that genuinely moves the date is how quickly you reply at the two checkpoints. Typical build time for this automation is **3-5 days**.



BEFORE YOU START

Your pre-flight checklist

Work down this list and the build starts the day you send it. Every item missing is a day added.

- **n8n (self-hosted)** — account open, credential copied and sent
- **HubSpot** — account open, credential copied and sent
- **Pipedrive** — account open, credential copied and sent
- **Gmail / Google Workspace** — account open, credential copied and sent
- **Slack** — account open, credential copied and sent
- **OpenAI** — account open, credential copied and sent
- **Stripe** — account open, credential copied and sent
- **Zendesk / Freshdesk / Intercom** — account open, credential copied and sent

- **Your brief** — answered in writing, even roughly
- **Spending caps set** — on every provider that offers them
- **Two-factor authentication OFF for now** — turn it on after handover; before, it blocks me during the build
- **You know who can authorise app connections** — if that is not you, loop them in before day one

THE ONE THING PEOPLE FORGET

Registering with a social login instead of email and password. It feels faster and it costs a day, because the only way into that dashboard is then through your personal account — which I will not ask for. Most services let you set a password afterwards in account settings; if you have already done it, message me and I will tell you which applies.



Revisions — what is included and what is not

Stated up front so neither of us has an awkward conversation later.

INCLUDED IN YOUR ORDER

Making it right

- Tuning it to hit the style and behaviour you briefed
- Fixing anything that does not work as described in this guide
- Adjusting the schedule, the volume or the destinations
- Swapping to a different AI model on the same tier
- Explaining any part of it as many times as you need

A NEW ORDER

Making it bigger

- Genuinely new capability that was not in the brief
- A second automation with a different purpose
- Rebuilding after a server was lost because a plan lapsed
- Ongoing content or data costs — those are yours and always were

THE HONEST VERSION

If something does not work the way this document says it will, that is on me and I fix it. If you want it to do something this document never claimed, that is new work and I will quote it rather than quietly absorb it and resent the order. Both of those are better than the alternative.



STEP 3 OF 3

What you receive, and what happens next

Delivered on the Fiverr order, so you keep the paper trail and the buyer protection.

AT HANDOVER

A running automation

Live on your own server, on the schedule you chose, with the workflow file exported so you can back it up, duplicate it or move it to another server.

PLUS

A written walkthrough

What each part does, what you can safely change, what to leave alone, and how to rotate your own keys so no key I ever saw stays valid.

YOUR FIVE-MINUTE ROUTINE AFTER HANDOVER

Change the passwords on every account above. Rotate each API key and paste the new one into the workflow — about sixty seconds, and I will show you where. Turn on two-factor authentication, but only after handover, or it blocks me during the build. Any contractor who resists being locked out after delivery is telling you something about their business model.



QUESTIONS

What clients actually ask

Do I need to understand n8n to use this?

No. Once it is running you interact with the tools you already use. The workflow itself is something you look at only if you want to change how it behaves.

What happens if a provider changes their API?

The workflow breaks loudly rather than silently, and you message me. That is not a formal support contract, but I have never ignored a client.

Can you run it on your server instead of mine?

I would rather not, and you should not want me to. If it runs on my infrastructure you depend on me forever. On your own server, you do not.

How long until it is live?

3-5 days of build time is typical for this one. What moves the date is how quickly you reply at the two approval checkpoints, not the work itself.

What if I want it changed after delivery?

Tuning it to behave the way you briefed, and fixing anything that does not work as described, is included. Genuinely new capability is a new order.

HOW TO START

Order through Fiverr and keep everything on the platform — the order, the messages, the files and the payment. That is what gives you buyer protection and recourse.

https://www.fiverr.com/majidkhan_moh

Support is handled by email at support@storeswiki.com and through the ticket system, so nothing gets lost in a chat thread. Majid Khan operates as part of StoresWiki LLC, Lewes, Delaware, USA.