AUTOMATION BRIEF

Invoice Inbox Automation

Novus Realty · Farihan Sodiq · Last Updated: 06-Mar-2026

OWNER	PLATFORM	STATUS	VERSION
Farihan Sodiq	**Make.com**	**Active**	**1.0**

PURPOSE & SUCCESS CRITERIA

Problem: Novus Realty receives dozens of invoices weekly from vendors, utility companies, and contractors. An admin manually opened each email, extracted details, and logged them into a Google Sheet — repetitive, error-prone, and unsustainable at scale.

Solution: The automation monitors the Gmail inbox 24/7, detects invoice emails, extracts structured data via AI, and logs every invoice automatically — with deduplication, error handling, and a status flag for every entry.

Used by: Admin team (monitoring) and founder/finance lead (sheet review). No action required once active.

Metric	Before	After
Invoice logging time	5–10 min per invoice (manual)	**< 2 minutes (automated)**
Data entry errors	Frequent (human error)	**Minimal (AI extraction)**
Duplicate entries	Possible with reprocessing	**Blocked by two-layer deduplication**
After-hours coverage	None	**24/7 continuous monitoring**

HOW IT WORKS

1	**Watch Gmail Inbox:** Monitors continuously for emails with 'invoice' or 'billing' in the subject. Only new, unread emails are picked up and automatically marked as read.
2	**Deduplication Gate:** Checks the Sheet for the email's unique Message ID before anything else. If already processed, the run stops — saving time and API costs. All emails, including duplicates, are logged for audit purposes.
3	**Route by Content Type:** A router checks for a PDF attachment. Emails with PDFs go through the PDF path; emails without go through the body text path.
4	**Extract Invoice Text:** PDFs are parsed via PDF.co AI Invoice Parser. If extraction fails due to unavailability or rate-limiting, the automation retries at intervals. Body-only emails use cleaned email text directly.
5	**AI Data Extraction:** GPT-4o mini parses the text and returns a structured JSON: vendor name, invoice number, invoice date, due date, total amount, currency, and description.
6	**Invoice Deduplication Check:** A second check queries the sheet by invoice number and vendor name — catching the same invoice arriving via a different email entirely.

7	**Log to Google Sheets:** Fields are written as a new row. Status is auto-set to 'Needs Attention' if any core field is missing, triggering conditional highlighting for easy review.

HOW TO USE IT

Day-to-Day (Admin)

1. Open the Invoice Log Google Sheet to view processed invoices.
2. Filter by the Status column — red rows flagged **'Needs Attention'** require manual review.
3. Use the Email Link column to open the original email directly in Gmail.

If an Invoice Is Missing

- Confirm the email subject contained 'invoice' or 'billing' — other subjects are not picked up.
- Review the Duplicate Invoices sheet to check if it was already processed.
- Check the Make.com execution log for failed runs, or forward the email to the inbox to re-trigger.

If a Row Shows 'Needs Attention'

- Open the original email via the Email Link column and confirm the invoice details.
- Manually complete any missing fields in the sheet and escalate to the relevant stakeholder.

APPENDIX

Assumptions & Limitations

- One Gmail inbox monitored — multiple inboxes require separate scenarios.
- PDF.co free tier has a monthly page limit; upgrade if invoice volume increases significantly.
- Very low-quality scanned invoices may still fail even with the AI Invoice Parser and OpenAI fallback.
- Email links only work if the user is logged into the exact Gmail account that received the invoice.
- Gmail OAuth on personal @gmail.com accounts expires every 6 months — **reauthorise the Make connection when prompted.**
- The automation trigger is limited by the type of modules used and the subscription plan. We are currently unable to active immediate trigger. "Immediately" is only available for instant triggers. Gmail's Watch Emails is a polling trigger, not an instant trigger

Troubleshooting

- **Scenario not triggering:** Confirm Make.com scenario is ON and Gmail connection is authorised.
- **Dates showing as numbers:** Select the entire date column > Format > Number > Date.
- **Duplicate rows:** Verify the Message ID column is populated, and the Search Rows filter points to it.
- **OpenAI returning 'Not Available':** Check the email body is non-empty and the expected values are passed.

Key Artefacts

- Make.com Blueprint — scenario JSON export
- Invoice Log — Google Sheet (link in team drive)
- Loom Walkthrough — screen recording of full automation run