FREE PDF

10 AI Agent Recipes

Digihandler Academy · Ready-to-copy agent and automation recipes for replies, lead follow-up and reports. Tools and plans checked on official pages in November 2026.

How to use this sheet

- [ ] Pick **one** recipe. Run it for two weeks before you add another.
- [ ] Fill in the Business Facts Sheet on page 3 first. Every recipe works better with it.
- [ ] Start every recipe in **draft mode**: the agent writes, a person checks and sends.
- [ ] Write down what each recipe saves you in the tracker on page 4.

Replies

1 24/7 WhatsApp answers

Tool: Business AI in the WhatsApp Business app (Tools tab, "Your Business AI"), if your account is eligible. **Trigger:** A customer messages you at any time.

Setup: Add your catalogue, prices, timings, address, delivery and refund rules. Test it from a family member's phone with your 10 most common questions.

Human check: Read 10 AI chats every evening for the first two weeks. Fix wrong answers in your business info.

2 Handover to a human

Tool: Any reply agent with a takeover option. **Trigger:** Complaint, refund, bulk order, medical or legal question, angry tone.

Rule to give the agent: "If the customer asks about a refund, a complaint, a custom price or anything not in our business info, say a team member will reply within [time] and stop."

Human check: Reply to every handed-over chat within the time you promised.

3 Review reply drafts

Tool: Any chat AI (ChatGPT, Gemini, Claude). **Trigger:** Once a week, copy new reviews into the chat.

Prompt: "Write a short, polite reply to each review below. Thank the person by first name. For a complaint, say sorry once, give our phone number and offer to fix it. No discounts. Under 50 words each."

Human check: Edit and post each reply yourself.

Lead follow-up

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4 Reply to a new enquiry in minutes

Tool: Zapier Agents (free plan lists 400 activities a month) or n8n.

Trigger: New Google Form or website form entry.

Instructions: "Read the new enquiry. Using the business facts file, draft a friendly email reply that answers the question and offers two call times. Save it as a Gmail draft. Do not send."

Human check: Open drafts twice a day, edit, send.

5 Lead sheet with a status column

Tool: Google Sheets plus Zapier Agents, n8n or Workspace Studio.

Trigger: Every new enquiry.

Instructions: "Add a row with date, name, phone, source, what they want, and status New. Write a one-line summary of the enquiry."

Human check: Update the status yourself after each call: Contacted, Visit booked, Won, Lost.

6 Day 1, 3 and 7 follow-up

Tool: Zapier Agents or n8n on a daily schedule.

Trigger: Every morning at 9 am.

Instructions: "Check the lead sheet. For rows still marked New or Contacted that are 1, 3 or 7 days old, draft a short follow-up. Day 7 is the last one: a polite goodbye. Save drafts only."

Human check: Never follow up with anyone who said no or asked you to stop.

7 Missed-call and after-hours list

Tool: Workspace Studio (Business Starter and above) or a chat AI.

Trigger: Every morning.

Instructions: "Summarise enquiry emails and form entries that came in after 7 pm yesterday. List name, need and the best next step, most urgent first."

Human check: Call the top three before 11 am.

Reports

8 Monday morning report

Tool: Workspace Studio flow, or n8n.

Trigger: Every Monday at 8 am.

Instructions: "From the lead sheet, count last week's enquiries by source, how many were Won, and which leads have no reply yet. Send me a short summary in Chat or email."

Human check: Spot-check two numbers against the sheet each week.

9 Order and invoice extraction

Tool: Workspace Studio (Extract step) or n8n.

Trigger: New email from a supplier or marketplace.

Instructions: "Pull out order number, amount, due date and supplier name. Add them as a new row in the Payments sheet."

Human check: Match totals with your bank or accounting app before you pay anything.

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10 Month-end customer questions report

Tool: Any chat AI. **Trigger:** Last day of the month.

Prompt: "Here are this month's customer questions (names removed). Group them into the top 5 themes, with a count for each. Suggest one FAQ answer, one post idea and one offer idea for each theme."

Human check: Add the new FAQ answers to your business info for recipe 1.

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TEMPLATE

Business Facts Sheet

Fill this once. Paste it into every agent as its knowledge source or instructions. Update it when anything changes.

Business name and what you sell

Address and Google Maps link

Opening days and timings

Phone / WhatsApp for a human

Top 5 products or services with prices

Delivery areas, charges and time

Payment methods

Refund, exchange or cancellation rule

10 questions customers ask most, with your answer

Tone (e.g. friendly, Hinglish okay, use "ji")

Things the agent must never do (e.g. promise discounts, share stock numbers, give medical advice)

Handover rules: when a human takes over

- [ ] Complaints, refunds and payment problems
- [ ] Custom prices, bulk orders and special requests
- [ ] Health, legal or money advice
- [ ] An angry or upset customer, or anyone asking for a person
- [ ] Anything not in the Business Facts Sheet
- [ ] My own rule: _____

Promised human reply time

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Safety checklist before you switch any recipe on

- [ ] The agent saves drafts, it does not send, for the first two weeks.
- [ ] No Aadhaar, PAN, card or bank numbers or passwords go into any AI tool.
- [ ] The agent only has access to the folders, sheets and inboxes it needs.
- [ ] I tested it with 10 real-looking messages, including two tricky ones.
- [ ] I know how to pause or switch it off in one tap.
- [ ] I checked the free plan limit and set a spending cap if the tool has one.

TRACKER

Recipe results log

Write one row per recipe each week. Keep what saves time; switch off what does not.

Week	Recipe	Runs / chats	Mistakes found	Time saved	Keep, fix or stop?

Free plans and starting prices (as listed in November 2026)

Tool	What the official page listed
WhatsApp Business AI	Inside the WhatsApp Business app for eligible Indian small businesses. Meta's launch post did not state a price.
Zapier Agents	Free: 400 activities a month, up to 10 per run, tests count. Pro: 1,500 activities a month. Zapier's free plan also lists 100 tasks a month for Zaps.
n8n	Community edition is free if you host it yourself. Cloud Starter listed at €20 a month (annual billing) with 2,500 executions.
Google Workspace	Business Starter listed at ₹270 per user a month on an annual plan, before tax, with Gemini in Gmail and Workspace Studio. Gemini in Sheets starts at Business Standard.

Prices and free plans change. Check each tool's official pricing page before you buy or upgrade.

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