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Project: automate a weekly summary

Build an automation that gathers the week's sign-ups or messages, asks AI for a short summary, and sends it to you for review, safely and switch-off-able.

Pass the check (4 of 5) online to earn the “Automation Builder” badge:
https://digitalbuilders757.com/university/study/project-weekly-summary-automation

What you'll build

Every Monday morning, an automation collects last week's entries from a sheet or form (sign-ups, orders, feedback or contact messages), asks an AI step for a five-bullet summary with anything that needs action, and emails it to you. No code is required: tools such as Zapier, Make or n8n connect the steps. It saves an hour a week and teaches triggers, actions and safe AI steps.

Step 1: Map it on paper

- Trigger: a schedule (every Monday at 8am).
- Gather: rows added to your sheet in the last seven days.
- AI step: summarise in five bullets; list anything urgent; never invent numbers.
- Action: email the summary to yourself only.
- Off switch: where to pause it, and who to tell if it misbehaves.

Step 2: Build it in test mode

Create the automation with a copy of your sheet and fake but realistic rows. Give each connection the least access it needs: read-only for the sheet, send-only for email. In the AI step, paste the rows with only the fields the summary needs, and remove names or contact details if the summary doesn't need them. Run it by hand and read the result like an editor.

Step 3: Check it, then let it run

Compare the summary with the sheet three times: are the counts right, is anything made up, is anything urgent missed? Tighten the prompt until it's reliable. Then switch to the real sheet, keep the email going only to you (a person reviews before anything goes to others), and check the run history weekly for errors. Write a two-line note of what it does and how to turn it off.

Key terms

Automation / workflow
Steps that run by themselves: when this happens, do that.

Action
A step an automation performs after the trigger.

Human in the loop
A person approves important steps before they happen.

Hallucination
A confident AI answer that is false or made up.

Trigger
The event that starts an automation.

Least privilege
Give each person, app or AI only the access its job needs.

Personal data
Information about an identifiable person, like names, emails or grades; follows privacy rules.

Logs
Records of what happened during a build or while the app ran, including errors.

Try it: Your first weekly summary

1. Draw the five boxes from Step 1 for your own sheet or form.
2. Build it with a copy of the sheet and fake rows, with least-access connections.
3. Run it three times and fix the prompt until the counts are right and nothing is invented.
4. Switch to real data, keep the email to yourself, and write the off-switch note.

KNOWLEDGE CHECK

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5 questions. Circle one answer for each; 4 or more correct passes. Answers are at the back.

1. What's the trigger in a weekly summary automation?

A. A schedule, like every Monday at 8am
B. The email it sends to your team every week
C. The AI model
D. Your password

2. How much access should the sheet connection have?

A. Full edit access to all your files, in case it needs more later
B. Read-only access to the one sheet it needs
C. Your admin account
D. Access to your bank

3. Best way to build and test it first?

A. Point it at real customer data straight away
B. Turn it on and check next month
C. Use a copy of the sheet with fake but realistic rows, and run it by hand
D. Send the first summary to all your customers

4. The AI summary says 42 sign-ups, but the sheet has 37. What do you do?

A. Trust the AI, since it may have counted rows the sheet missed
B. Change the sheet to 42 so the numbers match in future reports
C. Ignore it, close enough
D. Fix the prompt (for example, pass the count) and re-check

5. Why write an off-switch note?

A. So anyone can pause it fast if it misbehaves
B. It's decoration that makes the doc look more professional
C. To make the automation run faster by skipping its checks
D. Automations can't be turned off once they're running, so it's a warning

Official sites

Zapier: https://zapier.com
Make: https://www.make.com
n8n: https://n8n.io

Last reviewed 2026-11-25. AI tools change fast; check each tool's own site for current features, plans and prices.

ANSWER KEY

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1. A: A schedule, like every Monday at 8am
The trigger starts the run; actions are what it does next.

2. B: Read-only access to the one sheet it needs
Least privilege: if something goes wrong, it can only touch what it needs.

3. C: Use a copy of the sheet with fake but realistic rows, and run it by hand
Test mode with fake data lets you fix mistakes before they matter.

4. D: Fix the prompt (for example, pass the count) and re-check
AI can invent numbers. Give it the facts and check it against the source.

5. A: So anyone can pause it fast if it misbehaves
Every automation needs an owner and an easy way to stop it.