HANDOVER PACK

Quote Requests — AI Triage

What this automation does, how it works, and what to keep an eye on.

CLIENT	HANDOVER DATE	STATUS
Hartley Renovations (Dublin)	14 October 2026	Active

RUNS WHEN	WORKFLOW VERSION	N8N ID
A new email arrives in “Quotes”	`3a91f0c2`	`QtR8hartleyAI01`

In short

When a customer emails the Quotes inbox, this automation reads the email with AI, pulls out the contact details and the project, and scores the lead from 0 to 100.

Quote requests are added to the Leads sheet. Hot leads (70 or more) are flagged to the sales team on Slack. A reply is written by AI and saved as a Gmail draft, for someone to check and send. Other emails are labelled “Other”.

10	4	2	7
steps	accounts to hand over	steps that use AI	watch points, 1 critical

1 How it works, step by step
2 What it reads and what it produces
3 Settings you can change
4 Accounts and access to hand over
5 When something goes wrong
6 Watch points
7 AI usage register (EU AI Act)
8 Routine maintenance

1. How it works, step by step

Step names in bold are the ones you'll see in the n8n editor. Steps 6 and 8 both start once step 5 is done.

1. **New email in Quotes** Trigger · Gmail
   Checks the Gmail label “Quotes” every minute and starts a run for each new email.

2. **Extract & score request** AI · OpenAI
   Sends the email to OpenAI (gpt-4.1-mini). The AI returns the customer's details, the project type, budget and urgency, whether it's a quote request, and a lead score from 0 to 100.

3. **Parse AI answer** Code Single point of failure
   Reads the AI's answer and marks the lead “hot” when the score is 70 or more. If the answer isn't valid JSON, the run stops here (see watch point 1).

4. **Is it a quote request?** If
   Quote requests continue to step 5. Anything else goes to step 10.

5. **Add lead to CRM sheet** Google Sheets
   Adds a row to the “Leads” sheet: date, contact details, project, budget, urgency, score, priority and status “New”.

6. **High priority?** If
   Lets only leads scored 70 or more through to Slack.

7. **Alert sales on Slack** Slack
   Posts “🔥 Hot lead” with the name, project, budget and score in the sales channel.

8. **Write reply with AI** AI · OpenAI
   Writes a short reply in the customer's language: thanks, an offer of a free site visit, and the typical price range for their project.

9. **Save reply as Gmail draft** Gmail Not sent automatically
   Saves the reply as a draft in the customer's email thread. Nothing is sent: a person must review the draft and send it.

10. **Label as Other** Gmail
    Labels emails that aren't quote requests as “Other”. Nothing else happens to them.

2. What it reads and what it produces

Reads: every new email in the Gmail label “Quotes” (subject and body).

WHERE	WHAT IT CREATES
Google Sheet “Leads”	One row per quote request, with these columns: Date, Name, Phone, Email, Address, Project, Budget (€), Urgency, Score, Priority, Status. **Keep these exact column names.**
Slack sales channel	One message per hot lead.
Gmail drafts	One draft reply per quote request, in the original email thread.
Gmail label “Other”	Emails that aren't quote requests.

3. Settings you can change

These can be changed without touching the rest of the workflow. Some live in two places: change both.

SETTING	CURRENT VALUE	WHERE TO CHANGE IT
Hot lead threshold	**70**	Step 3 (code) **and** step 6 (condition)
Typical prices	Bathroom from €6,500 · kitchen from €12,000 · extension from €45,000	The AI instructions of step 2 **and** step 8
AI model	`gpt-4.1-mini`	Steps 2 and 8
Tone and content of replies	Short and warm, free site visit, signed “The Hartley team”	The AI instructions of step 8
How often Gmail is checked	Every minute	Step 1
Sheet, Slack channel, Gmail labels	Fixed IDs	Steps 1, 5, 7 and 10

4. Accounts and access to hand over

ACCOUNT	USED BY	AT HANDOVER
Gmail – quotes@hartley Google sign-in	Steps 1, 9, 10	Connect the client's own mailbox. Check that the “Quotes” and “Other” labels exist.
OpenAI – Hartley API key	Steps 2, 8	Use a key from the client's own OpenAI account, with a monthly spending limit.
Google Sheets – Hartley Google sign-in	Step 5	Share the “Leads” sheet with the connected Google account.
Slack – Hartley Slack app	Step 7	Invite the app to the sales channel.

> Passwords and keys never appear in this pack. They stay in n8n's credential store and should be handed over through a secure channel.

5. When something goes wrong

SITUATION	WHAT HAPPENS	WHERE YOU'D SEE IT
The AI's answer isn't valid JSON	**The run stops at step 3. The email is not logged, labelled or answered.**	**Nowhere**
OpenAI is down or the quota is used up	The run stops at step 2. The email is not retried.	n8n execution history
Google Sheets refuses the row	The run stops at step 5: no Slack alert, no draft.	n8n execution history
Slack or the Gmail draft fails	The run stops at that step; the other branch may not run.	n8n execution history
The email isn't a quote request	Labelled “Other”, nothing else.	Gmail

No error workflow is set up: nobody is alerted automatically when a run fails.

6. Watch points

Found by reading the workflow automatically, most serious first.

CRITICAL **1. Leads can disappear without anyone noticing**

If the AI's answer isn't valid JSON, step 3 stops the run. The email is never logged, labelled or answered, and no one is told.

Fix: catch parsing errors in step 3, send failed emails to a “Needs review” label, and set an error workflow.

IMPORTANT **2. The workflow note says replies are sent automatically. They aren't.**

The note on the canvas says customers get an instant AI reply. In fact, replies are only saved as drafts. If nobody sends them, customers never hear back.

Fix: update the note, and agree who sends drafts (or add a daily reminder of unsent drafts).

IMPORTANT **3. Prices are written inside both AI instructions**

When prices change, it's easy to update one and forget the other: replies would then quote old prices.

Fix: keep prices in one place (a sheet or an n8n variable) and pass them to both steps.

IMPORTANT **4. Customer personal data is sent to OpenAI**

Names, phone numbers, email and postal addresses go to OpenAI with every email (see section 7).

Fix: check the data processing agreement and data retention settings, and mention it in the privacy notice.

MINOR **5. The hot-lead threshold is written twice**

The value 70 appears in step 3 and in step 6. Changing only one gives inconsistent results.

Fix: use the “priority” field from step 3 in step 6.

MINOR **6. Sheet, Slack channel and label IDs are fixed**

If the client recreates the sheet, the channel or a label, the workflow breaks.

Fix: list these IDs in the handover and store them as n8n variables.

KEEP AN EYE ON **7. The AI model is pinned to gpt-4.1-mini**

It works today. Check every few months that it's still available and priced as expected.

7. AI usage register PRO

Every step that uses AI, what it receives, and where a person checks the result.

STEP	PROVIDER	WHAT THE AI DOES	DATA IT RECEIVES	HUMAN CHECK
2. Extract & score request	OpenAI `gpt-4.1-mini`	Reads each email, extracts details, scores the lead 0–100	The full email, incl. **name, phone, email and postal address**	**None** — the score alone decides who gets a Slack alert
8. Write reply with AI	OpenAI `gpt-4.1-mini`	Writes the reply to the customer	Name, project type, budget	**Yes** — saved as a draft, a person reviews and sends it

EU AI Act — indicative pre-assessment

Risk level	**Not high-risk on the face of it.** Sorting and scoring renovation leads is not one of the high-risk uses listed in Annex III (employment, education, credit, essential services...).
Transparency (Art. 50)	Applies since 2 August 2026. Replies are written by AI but reviewed and sent by a person. **If replies are ever sent automatically, reassess** whether customers must be told they're dealing with AI.
AI literacy (Art. 4)	Whoever sends the drafts should know they're written by AI and may contain mistakes, such as outdated prices.
Data protection (GDPR)	Customer personal data is sent to OpenAI. **Check** the data processing agreement and retention settings, mention it in the privacy notice, and record it in the GDPR register.

Indicative pre-assessment generated from the workflow file. It is not legal advice and does not certify compliance.

8. Routine maintenance

- [ ] **Every week:** check the execution history for failed runs, and look for unsent drafts.
- [ ] **When prices change:** update both AI instructions (steps 2 and 8), until prices are stored in one place.
- [ ] **Every month:** check OpenAI usage and spending.
- [ ] **If an account is reconnected:** reselect it in every step that uses it (section 4).
- [ ] **Every quarter:** check that the AI model is still available, and review the AI usage register.

Sample pack showing the planned format. It was produced from the workflow export file with AI assistance, then checked by hand. It contains no passwords or keys. The client and the workflow are fictional.