**Qualify new leads in Google Sheets via**

OpenAI's GPT-4

**Workflow: Qualify New Leads in Google Sheets via OpenAI's GPT-4**

**Overview**

This workflow is designed to automatically qualify new leads submitted via Google Sheets (typically from a form or similar input) by using OpenAI's GPT-4 model. The workflow extracts lead information from a Google Sheet, sends it to OpenAI for qualification based on preset criteria, and then updates the lead status back in the same Google Sheet.

**Key Components**

1. **Google Sheets Trigger**
   * **Node:** Check for new entries
   * **Description:** Monitors a specified Google Sheet for new rows (new lead submissions). The trigger runs every minute and detects when a new lead is added.
2. **Lead Qualification with GPT-4**
   * **Node:** Qualify leads with GPT
   * **Description:** This node sends the lead information (such as name, email, business area, and team size) to OpenAI's GPT-4 model. The model evaluates the lead based on predefined criteria (e.g., decision-making responsibility and use of a corporate email domain) and returns a JSON response indicating whether the lead is "qualified" or "not qualified" along with an explanation.
3. **JSON Extraction and Parsing**
   * **Node:** Extract JSON reply
   * **Description:** This node parses the JSON output from the GPT-4 model, ensuring that the response adheres to the expected structure (with fields for rating and explanation).
4. **Data Merging and Update**
   * **Node:** Merge
   * **Description:** Combines the original lead data from the Google Sheet with the GPT-4 response.
   * **Node:** Update lead status
   * **Description:** Updates the corresponding row in the Google Sheet with the lead qualification result (e.g., setting the "Rating" column based on the GPT-4 output).
5. **Supporting Nodes**
   * **Sticky Notes:** Various sticky note nodes provide documentation and instructions within the workflow. They explain how to set up the Google Sheet, provide guidance on lead qualification instructions, and describe the process of merging data and updating the sheet.

**Data Flow**

1. **Triggering the Workflow:**
   * The workflow is triggered by the Check for new entries node when a new lead is added to the designated Google Sheet.
2. **Extracting Lead Data:**
   * The lead data (including fields such as Email Address, Your name, Your business area, Your team size, etc.) is captured from the new row.
3. **Qualifying the Lead:**
   * The Edit Fields node prepares the lead data and passes it to the Qualify leads with GPT node.
   * The GPT-4 model evaluates the lead using a system prompt that outlines the qualification criteria. The response includes a rating ("qualified" or "not qualified") and an explanation.
4. **Parsing the Response:**
   * The Extract JSON reply node parses the JSON response from GPT-4 to ensure it matches the expected schema.
5. **Merging Data:**
   * The Merge node combines the original lead data with the parsed GPT-4 response.
6. **Updating the Google Sheet:**
   * The Update lead status node updates the Google Sheet row corresponding to the lead, setting the "Rating" and "Timestamp" (and possibly other fields) based on the GPT-4 evaluation.

**Setup and Customization**

* **Google Sheets Configuration:**
  + Ensure your Google Sheets connection is correctly set up with the appropriate credentials.
  + The workflow uses a specific Google Sheet template; adjust the sheet ID and column mappings as necessary.
* **OpenAI GPT-4 Configuration:**
  + Set up your OpenAI API credentials and ensure the GPT-4 model is accessible.
  + Modify the system prompt in the Qualify leads with GPT node to fine-tune the qualification criteria.
* **Customization of Lead Qualification Criteria:**
  + You can adjust the instructions provided to GPT-4 to change how leads are evaluated, for example, by adding additional criteria or changing the weighting of existing ones.
* **Output Handling:**
  + The workflow uses the Extract JSON reply node to ensure the GPT-4 response is valid JSON. Make sure that the response format from OpenAI matches the expected structure.
  + The Update lead status node should be configured with the correct mapping to update the relevant columns in your Google Sheet.