**Qualifying Appointment Requests with AI &**

n8n Forms.txt

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

This workflow is designed to automate the lead qualification process for new entries added to a Google Sheets document. It leverages OpenAI's GPT-4 model to analyze lead information and determine whether a lead is qualified based on predefined criteria. The workflow then updates the Google Sheet with the qualification result.

**Key Workflow Components**

1. **Google Sheets Trigger**  
   The workflow is triggered when a new row is added to the connected Google Sheet, capturing lead details from form submissions.
2. **Data Extraction and Preparation**
   * **Edit Fields Node:** Extracts the relevant lead data (e.g., name, email, business area, team size) from the new row.
   * **Set Fields Node:** Formats this data into a JSON object that adheres to a specific schema for processing.
3. **Lead Qualification via OpenAI GPT-4**
   * **Qualify Leads with GPT Node:** The prepared data is sent to OpenAI's GPT-4 with a detailed system prompt that outlines the criteria for lead qualification. The prompt instructs GPT-4 to evaluate if the lead is a decision-maker, has significant team size, or meets other specified criteria.
   * **Output Format:** GPT-4 returns a JSON object containing a rating (e.g., "qualified" or "not qualified") along with an explanation for the decision.
4. **Response Parsing and Validation**
   * **Extract JSON Reply Node:** Parses and validates the GPT-4 response to ensure it matches the expected JSON schema.
   * **Merge Node:** Combines the original lead data with the GPT-4 response for subsequent processing.
5. **Google Sheets Update**
   * **Update Lead Status Node:** The final merged data is used to update the corresponding row in the Google Sheet, reflecting the lead's qualification status.
6. **User Feedback**
   * **Sticky Note Nodes:** Provide internal documentation and instructions for setup and usage of the workflow. They help users understand how to configure the Google Sheets trigger, format the input data, and interpret the output.

**Data Flow Summary**

1. **Trigger:**
   * The workflow initiates when a new lead is submitted to the Google Sheet.
2. **Data Preparation:**
   * Extracted lead data is formatted into a JSON object.
3. **Qualification Process:**
   * The JSON data is sent to GPT-4 with a detailed system prompt.
   * GPT-4 evaluates the data and returns a JSON response indicating the lead's qualification status.
4. **Response Handling:**
   * The GPT-4 response is parsed and validated.
   * The parsed response is merged with the original lead data.
5. **Update Google Sheet:**
   * The combined data is used to update the corresponding row in the Google Sheet with the lead's qualification result.

**Customization and Setup**

* **Google Sheets Integration:**
  + Configure the Google Sheets node with the correct document ID and credentials.
  + Adjust the column mappings if your sheet's structure differs from the provided template.
* **OpenAI GPT-4 Integration:**
  + Ensure that your OpenAI credentials are properly configured.
  + Customize the system prompt in the GPT-4 node to align with your specific lead qualification criteria.
* **Response Parsing:**
  + Use the JSON parsing nodes to enforce a consistent output format, ensuring that the GPT-4 response is correctly merged with the lead data.
* **Workflow Trigger Options:**
  + The workflow can be triggered automatically via a Google Sheets trigger or manually.
  + Adjust the trigger settings according to your requirements (e.g., polling interval).

**Conclusion**

This workflow streamlines the process of qualifying new leads by automating data extraction, evaluation, and update operations. By leveraging GPT-4, it provides consistent and scalable lead qualification, allowing your sales and marketing teams to focus on engaging with high-quality leads. The workflow is flexible and can be further customized to match your specific criteria and integration needs.