

CX-Catalyst - Email Integration Guide

Complete guide for configuring email (Gmail) as a support intake channel and notification delivery method.

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


Overview

CX-Catalyst uses Gmail integration for two purposes:

- **Inbound:** Receive support requests via email and route them into the AI triage pipeline
- **Outbound:** Send solution emails to customers, leadership reports, and escalation notifications

Email is an **optional** integration — the core system uses webhooks and Slack as primary channels. Adding email provides an additional customer-facing intake channel and a delivery mechanism for reports.

Prerequisites

-  Google Workspace or Gmail account dedicated to support (e.g., support@company.com)
 -  Google Cloud Console access to create OAuth credentials
 -  n8n instance accessible via HTTPS (required for OAuth callback)
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Gmail OAuth Setup

Step 1: Create a Google Cloud Project

1. Go to Google Cloud Console
2. Click **Select a project > New Project**
3. Name: CX-Catalyst Support
4. Click **Create**

Step 2: Enable the Gmail API

1. In the Cloud Console, go to **APIs & Services > Library**
2. Search for **Gmail API**
3. Click **Enable**

Step 3: Configure OAuth Consent Screen

1. Go to **APIs & Services > OAuth consent screen**
2. Select **Internal** (for Google Workspace) or **External**
3. Fill in:
 - **App name:** CX-Catalyst Support System
 - **User support email:** Your admin email
 - **Authorized domains:** Your company domain
4. Add scopes:
 - <https://www.googleapis.com/auth/gmail.send>
 - <https://www.googleapis.com/auth/gmail.readonly>
 - <https://www.googleapis.com/auth/gmail.modify> (for marking emails as read)
5. Save

Step 4: Create OAuth Credentials

1. Go to **APIs & Services > Credentials**
 2. Click **Create Credentials > OAuth client ID**
 3. Application type: **Web application**
 4. Name: n8n CX-Catalyst
 5. Authorized redirect URI: <https://your-n8n-instance.com/rest/oauth2-credential/callback>
 6. Click **Create**
 7. Copy the **Client ID** and **Client Secret**
-

n8n Credential Configuration

Create Gmail Credential

1. In n8n, go to **Settings > Credentials**
2. Click **Add Credential > Gmail OAuth2 API**
3. Enter:
 - **Client ID:** From Google Cloud Console
 - **Client Secret:** From Google Cloud Console
4. Click **Connect my account**
5. Sign in with the support email account
6. Grant the requested permissions
7. Click **Save**

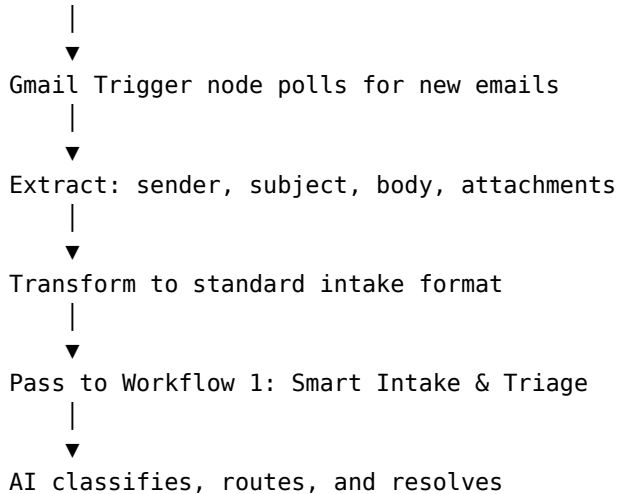
Verify Connection

After saving, test the credential by: 1. Creating a temporary workflow with a **Gmail** node 2. Selecting the credential 3. Setting action to **Get Many** messages 4. Executing — you should see recent emails

Inbound Email Processing

How It Works

Customer sends email to support@company.com



Gmail Trigger Configuration

In Workflow 1 (or a dedicated email intake workflow):

1. Add a **Gmail Trigger** node
2. Set **Poll Times**: Every 1 minute
3. Set **Mailbox Label**: Apply a label like support-inbox to filter relevant emails
4. Set **Read Status**: Unread only
5. Connect to a **Code** node that transforms the email into the intake format:

```
// Transform email to intake format
const email = $input.first().json;

return [{
  json: {
    customer_email: email.from.value[0].address,
    customer_name: email.from.value[0].name || email.from.value[0].address,
    description: `Subject: ${email.subject}\n\n${email.textPlain ||
email.snippet}`,
    severity: "medium",
    channel: "email",
    metadata: {
      email_id: email.id,
      email_thread_id: email.threadId,
```

```

        email_subject: email.subject
    }
}
}];

```

6. Connect the output to the existing intake triage pipeline

Email Parsing Considerations

- **Subject line** — Append to the description so the AI can use it for classification
- **HTML body** — Use `textPlain` over `textHtml` for cleaner AI input
- **Attachments** — Log attachment names in metadata; attachment content is not sent to AI
- **Thread replies** — Check `threadId` to associate follow-up emails with existing cases

Outbound Email Delivery

Solution Delivery

When a case is resolved (self-service or human-approved), send the solution via email:

1. Add a **Gmail** node at the end of the resolution branch
2. Set **Operation**: Send
3. Set **To**: `{{ $json.customer_email }}`
4. Set **Subject**: `Re: {{ $json.email_subject || "Your Support Request" }}` [Case `{{ $json.case_id }}`]
5. Set **Message**: Use the HTML template (see Email Templates below)

Leadership Reports

Workflow 5 sends daily leadership reports via email:

- **To**: `{{ $env.LEADERSHIP_EMAIL }}`
- **Subject**: `CX-Catalyst Daily Report - {{ $now.format('YYYY-MM-DD') }}`
- **Body**: HTML-formatted report with case metrics, trends, and AI performance

Escalation Notifications

For critical escalations without Slack:

- **To**: `{{ $env.SUPPORT_TEAM_EMAIL }}`
- **Subject**: `[URGENT] Case {{ $json.case_id }} - {{ $json.priority }} Priority Escalation`
- **Body**: Case details, AI analysis, and escalation reason

Email Templates

Solution Email Template

```

<div style="font-family: Arial, sans-serif; max-width: 600px;">
  <h2>Support Case Resolution</h2>
  <p>Hi {{ $json.customer_name }},</p>

```

```

<p>We've reviewed your support request and have a solution for you:</p>

<div style="background: #f5f5f5; padding: 16px; border-radius: 8px; margin: 16px 0;">
  <strong>Case ID:</strong> {{ $json.case_id }}<br>
  <strong>Category:</strong> {{ $json.category }}<br>
  <strong>Priority:</strong> {{ $json.priority }}
</div>

<h3>Solution</h3>
{{ $json.solution_html }}

<h3>Referenced Articles</h3>
<ul>
  {{ $json.kb_articles }}
</ul>

<p>If this resolves your issue, no further action is needed. If you need additional help, please reply to this email or submit a new request.</p>

<p>
  <a href="{{ $json.feedback_url }}"?score=5">Rate this solution</a>
</p>

<p>Best regards,<br>Support Team</p>
</div>

```

Escalation Email Template

```

<div style="font-family: Arial, sans-serif; max-width: 600px;">
  <h2 style="color: #d32f2f;">Escalation Alert</h2>

  <div style="background: #fff3e0; padding: 16px; border-radius: 8px; border-left: 4px solid #ff9800;">
    <strong>Case:</strong> {{ $json.case_id }}<br>
    <strong>Customer:</strong> {{ $json.customer_name }}
    ({{ $json.account_tier }})<br>
    <strong>Priority:</strong> {{ $json.priority }}<br>
    <strong>Reason:</strong> {{ $json.escalation_reason }}
  </div>

  <h3>Issue Description</h3>
  <p>{{ $json.description }}</p>

  <h3>AI Analysis</h3>
  <p>{{ $json.ai_reasoning }}</p>

  <p><a href="{{ $json.review_url }}">Review this case</a></p>
</div>

```

Workflow Integration

Which Workflows Use Email

Workflow	Email Function	Direction
WF1: Intake & Triage	Receive support requests	Inbound
WF2: Self-Service	Send automated solutions	Outbound
WF4: Collaborative	Send human-approved solutions	Outbound
WF5: Learning	Send daily leadership reports	Outbound

Environment Variables

SUPPORT_EMAIL=support@company.com

LEADERSHIP_EMAIL=leadership@company.com

SUPPORT_TEAM_EMAIL=support-team@company.com

Troubleshooting

Issue	Cause	Solution
OAuth flow fails	Redirect URI mismatch	Verify the n8n callback URL matches exactly in Google Cloud Console
“Insufficient permissions”	Missing scopes	Re-authorize with gmail.send, gmail.readonly, gmail.modify scopes
Emails not detected	Wrong label filter	Check the Gmail Trigger label matches the inbox label
Duplicate processing	Emails re-read	Ensure the trigger marks processed emails as read
Send rate limits	Gmail daily send limit	Gmail allows 500 emails/day (Workspace: 2,000/day); use batch delays if needed
HTML not rendering	Template errors	Test templates with a manual send before deploying in workflows
“Token expired”	OAuth refresh failed	Re-connect the Gmail credential in n8n; check that the Google Cloud app is not suspended

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