

CX-Catalyst - Quick Start Guide

Get the AI-powered support system running in under 30 minutes.

Prerequisites

Before starting, ensure you have:

- n8n instance (Cloud or self-hosted v1.0+)
- PostgreSQL 14+ with pgvector extension (Supabase recommended)
- API keys: Anthropic (Claude), OpenAI
- Supabase project URL and service role key
- Confluence Cloud account with API token
- Slack workspace with bot permissions
- Gmail account for email integration (optional)

For full infrastructure requirements and credential details, see the Admin Guide - Installation Requirements.

Step 1: Database Setup (5 minutes)

Run the schema in your PostgreSQL database:

```
psql -h your-db-host -U postgres -d postgres -f schema.sql
```

Or copy the schema from cx-catalyst-workflow.md (Appendix: Database Schema section).

Minimum tables needed for Quick Start: - customers - cases - case_interactions

Step 2: Import Workflows (5 minutes)

1. Open n8n UI
2. Go to **Workflows > Import from File**
3. Import in order:
 - workflow-1-smart-intake-triage.json
 - workflow-2-self-service-resolution.json

Tip: Start with just Workflows 1 & 2 for basic intake and self-service resolution.

Step 3: Configure Credentials (10 minutes)

Create these credentials in n8n (**Settings > Credentials**):

Credential	Type	Required For
PostgreSQL	Database	All workflows
Anthropic API	API Key	AI classification & solutions
OpenAI API	API Key	Embeddings
Supabase	API Key	Vector store
Slack	OAuth2	Notifications

Connect Credentials to Nodes

1. Open each imported workflow
 2. Click nodes with red warning indicators
 3. Select your configured credential from the dropdown
 4. Save the workflow
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Step 4: Set Environment Variables (5 minutes)

In n8n: **Settings > Environment Variables**

N8N_WEBHOOK_BASE_URL=https://your-n8n-instance.com

Step 5: Activate & Test (5 minutes)

Activate Workflow 1

1. Open **Workflow 1: Smart Intake & Triage**
2. Toggle **Active** (top right)
3. Copy the webhook URL shown

Send Test Request

```
curl -X POST https://your-n8n.com/webhook/support/intake \
-H "Content-Type: application/json" \
-d '{
  "customer_id": "test-001",
  "customer_email": "test@example.com",
  "customer_name": "Test User",
  "description": "Cannot login to my account",
  "severity": "medium",
  "product": "web-portal"
}'
```

Expected Response

```
{
  "success": true,
  "case_id": "uuid-here",
  "status": "triaged",
```

```
        "message": "Your support request has been received..."  
    }

---


```

What's Working Now

With Workflows 1 & 2 active:

1. **Intake** - Support requests received via webhook
 2. **AI Classification** - Automatic categorization and priority
 3. **Smart Routing** - Cases route to self-service or escalation
 4. **Self-Service** - AI-generated solutions for simple issues
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Next Steps

Add More Workflows

Workflow	Purpose	When to Add
3 - Proactive Detection	Monitor for issues	After basic flow works
4 - Collaborative Support	Human-in-loop	When team is ready
5 - Continuous Learning	Daily insights	After 1 week of data

Set Up Confluence Knowledge Base

This is critical for AI resolution quality!

1. Create a Confluence space for support articles
2. Populate with 20-50 core articles (see Confluence Integration Guide)
3. Run the indexing workflow to generate embeddings
4. Test vector search retrieval

Quick Setup:

```
# See the Confluence Integration Guide for:  
- Creating API credentials  
- Setting up Supabase vector store  
- Creating the indexing workflow  
- Writing effective KB articles
```

Configure Additional Integrations

- **Jira** - For bug tickets and escalations
 - **Gmail** - For email support channel
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Troubleshooting

Issue	Solution
Webhook not responding	Ensure workflow is Active
Database errors	Check PostgreSQL credentials and schema
AI errors	Verify Anthropic API key and quota
Empty classification	Ensure customer exists in database

Check Logs

1. Open workflow
 2. Click **Executions** tab
 3. Review node outputs for errors
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Support

- Full documentation: `docs/` folder
 - User Guide - For support team members
 - Admin Guide - System administration
 - API Reference - Webhook API documentation
 - Confluence Integration - Knowledge base setup
 - Best Practices - KB, workflow, and security optimization
 - Workflow README: `n8n-workflows/README.md`
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