Creating an Automated Lead Handling System in n8n Using Form Trigger, Set, If, and Switch Nodes

Overview:

This SOP outlines how to build a smart, automated lead routing and notification system in n8n using Form Trigger, Set, If, and Switch nodes. This system captures lead data via a form, formats it consistently, routes leads to specific teams based on predefined criteria, and sends appropriate email or Telegram notifications. The workflow also saves categorized leads in respective Google Sheets for tracking. By the end, users can replicate and adapt this workflow to handle leads efficiently while minimizing errors and manual intervention.

Step-by-Step Guide:

1. **Create a New Workflow in n8n**

    a. Open n8n and create a new workflow.

    b. Set the workflow to "Active" for the form URL to function.

2. **Add Form Trigger Node**

    a. Search for and add the `n8n Form Trigger` node.

    b. Customize the form title and description.

    c. Add the following fields:

    - Full Name (text, required)

    - Email (email, required)

    - Company Name (text, required)

- Product Type (dropdown: AI Automation, Website Development, Marketing Funnel, Other)

- Budget (number, required)

- Urgency Level (dropdown: Low, Medium, High)

- Description (text, required)

   d. Enable the response message on submission.

   e. Add optional CSS styling for branding.

3. **Add Set Node to Format Data**

   a. Use manual mapping in the Set node.

   b. Map each field:

- Convert email to lowercase using:

```
{{ $json["email"].toLowerCase() }}
```

- Format date using:

```
{{ $json["date"].toDateTime().format("DD-MM-YYYY hh:mm A") }}
```

4. **Add If Node for High Priority Leads**

   a. Drag and drop the `budget` and `urgency` fields into the If node.

   b. Set conditions:

- Budget `>= 5000`

- OR Urgency `= High`

   c. Enable "Convert Types Where Required."

5. **Send Telegram Notification for Urgent Leads**

   a. Add a `Telegram` node (Send Text Message).

   b. Use BotFather to create a bot and get an API token.

   c. Set up a Telegram Trigger to retrieve your chat ID.

   d. Compose the message using expressions with dynamic fields.

6. **Add Switch Node to Route Leads by Type**

    a. Route based on `Product Type` .

    b. Define outputs:

    - AI Automation

    - Website Development

    - Marketing Funnel

    c. Enable "Send Data to All Matching Outputs" to also route to General Leads.

7. **Send Email Notifications**

    - **For Web Team:**

        1. Use a `Gmail` node with HTML template.

        2. Inject variables via expressions from the `Set` or `Switch` node.

    - **For Marketing Team:**

        1. Use a similar `Gmail` node with a different HTML template.

8. **Save Leads to Google Sheets**

    a. Add a `Google Sheets` node for each lead type and general leads.

    b. Select the respective sheet tab (AI Clients, Web Leads, Marketing Leads, General Leads).

    c. Manually map columns to fields from the Set node using expressions like:

    ```
    {{ $node["Switch"].json["name"] }}
    ```

9. **Test the Workflow**

    a. Submit the form with different combinations:

    - High priority AI lead

    - Medium urgency web lead

    - Low budget marketing request

    - Other lead types

     b. Verify Telegram messages, emails, and Google Sheets entries.

Warnings and Notes:

- **Always Convert Data Types:** Failing to enable "Convert Types Where Required" in If nodes can cause numeric comparisons to fail.

- **Use Dropdowns to Prevent Input Errors:** Dropdown fields ensure that routing logic works reliably without unexpected values.

- **Use Expressions Consistently:** When referencing values in different nodes, use precise expression syntax to prevent mismatches or missing data.

Visual Diagram:

```
flowchart TD
    A[Start Workflow] → B[Form Trigger Node]
    B → C[Set Node: Format Data]
    C → D[If Node: Check Priority]
    D →|True| E[Send Telegram Notification]
    D →|False| F[Continue to Routing]
    E → F
    F → G[Switch Node: Route by Product Type]
    G → H[Route: AI Automation]
    G → I[Route: Website Development]
    G → J[Route: Marketing Funnel]
    G → K[Route: General Leads]

    H → L[Save to AI Clients Sheet]
    I → M[Send Web Email]
    I → N[Save to Web Leads Sheet]
    J → O[Send Marketing Email]
    J → P[Save to Marketing Leads Sheet]
    K → Q[Save to General Leads Sheet]
```