



N8N-Contact Form Processor

Setup & User Guide

Overview

The **N8N-Contact Form Processor** is an n8n workflow that turns website contact form submissions into triaged, logged, and answered leads. On every submission it:

1. Receives the form POST through a webhook and immediately returns `{"status": "ok"}` to the browser.
2. Normalizes the fields and validates the submission: honeypot check, email format, empty message, and link-stuffing limit.
3. Classifies valid submissions with OpenAI into **Sales, Support, Vendor, Spam, or Other**, assigns **High / Normal / Low** urgency, and writes a one-sentence summary.
4. Logs every submission (valid, spam, or rejected) to your SharePoint list with 12 columns including category, urgency, summary, and status.
5. Sends a branded Outlook notification to the mailbox mapped to the category, with the lead's contact details attached as a `.vcf` card.
6. Optionally sends a branded auto-reply to the submitter with your company contact card attached.

Rejected and spam submissions are logged but never emailed. If the AI step fails or has no credential, the lead is still delivered with category `General`.

Workflow map

Section	Nodes	What happens
Trigger & validation	Webhook — Contact Form Set — Workflow Configuration Code — Normalize & Validate Webhook — Respond to Form IF — Valid Submission	Receive, load your settings, clean up the payload, answer the browser, decide valid vs. rejected.
AI triage	AI — Triage Submission OpenAI — Chat Model Parser — Triage	Classify valid entries; tag rejected entries; combine everything into one lead record and resolve the routing address.

	JSON Set — Mark Rejected Set — Assemble Lead Record	
Logging	SharePoint — Log Submission	Append the record to your SharePoint list.
Notify & auto- reply	IF — Should Notify Code — Build Emails & vCards Outlook — Send Notification IF — Auto-Reply Enabled Outlook — Send Auto- Reply	Build both HTML emails and both vCards, send the notification, then the auto-reply if enabled.

Prerequisites

- An n8n instance (cloud or self-hosted) reachable from the public web.
- Microsoft 365 with SharePoint and Outlook, and rights to create the OAuth credentials described below.
- An OpenAI API key (optional, required for AI triage).
- Access to your website form so you can set its action or fetch URL and add two hidden fields.

Installation

1. In n8n go to **Workflows > Import from File** and select the workflow JSON from the `export` folder.
2. Confirm 16 working nodes plus 5 sticky notes appear on the canvas.
3. Open **Settings** for the workflow and, if you use an error workflow, select it there.

Configuration

Step 1: Set — Workflow Configuration

Everything you normally need to change lives in this one node. Open it and edit the JSON:

Key	Purpose
<code>notificationEmail</code>	Default recipient for new leads. Required.
<code>salesEmail</code> , <code>supportEmail</code>	Optional routing. Leads classified Sales go to <code>salesEmail</code> , Support to <code>supportEmail</code> ; leave blank to use the default.

<code>brandName</code> , <code>brandWebsite</code> , <code>logoUrl</code>	Shown in the header and footer of both emails. The logo must be a publicly reachable image URL.
<code>colorHeader</code> , <code>colorAccent</code> , <code>colorButton</code>	Hex colors for the email header, accent stripe, and buttons.
<code>enableAutoReply</code> , <code>autoReplySubject</code> , <code>autoReplyMessage</code>	Turn the auto-reply on or off and set its subject and body text.
<code>maxLinksInMessage</code>	Messages with more links than this are rejected as spam (default 3).
<code>attachLeadCard</code> , <code>attachCompanyCard</code>	Attach the submitter's <code>.vcf</code> to the notification, and your <code>.vcf</code> to the auto-reply.
<code>companyCard</code>	Your contact card: <code>firstName</code> , <code>lastName</code> , <code>title</code> , <code>organization</code> , <code>phone</code> , <code>email</code> , <code>website</code> .

Step 2: Required placeholders

Placeholder	Node	Description	How to set
YOUR_SITE_ID	SharePoint — Log Submission	The SharePoint site that holds your submissions list.	Use the Site picker in the node (From list), or paste the site ID from Graph Explorer (<code>GET /sites/{hostname}/sites/{path}</code>).
YOUR_LIST_ID	SharePoint — Log Submission	The list that stores submissions.	Use the List picker in the node once the site is selected, or copy the GUID from List Settings.

Create these columns in your SharePoint list (exact names, all text):

Title, Email, Phone, Message, Date, Time, Source, Category, Urgency, Summary, Status, SubmittedAt

The log node is set to continue on error so a column mismatch will not block the notification email. Check the n8n execution log if rows are not appearing.

Step 3: Credentials

Provider	Node(s)	Credential type	Instructions
Microsoft SharePoint	SharePoint — Log Submission	microsoftSharePointOAuth2Api	Azure app registration with <code>Sites.ReadWrite.All</code> ; create the credential under Credentials in n8n and sign in.
Microsoft Outlook	Outlook — Send Notification Outlook —	microsoftOutlookOAuth2Api	Azure app registration with <code>Mail.Send</code> ; the mailbox you sign in with is the sender for both emails.

	Send Auto-Reply		
OpenAI	OpenAI — Chat Model	openAiApi	API key from platform.openai.com. Default model is <code>gpt-4.1-mini</code> ; any current chat model works.

Step 4: Webhook and your form

- Open **Webhook — Contact Form**. The path is `/form-processor`; copy the **Production URL** after activating.
- Point your form at that URL with method **POST**. Form-encoded and JSON bodies both work.
- Field names recognized: `Name`, `Email`, `Phone`, `Message`, `Date`, `Time`, `Source` (lowercase and common variants such as `your-name` are also accepted).
- Add a hidden field named `website` and leave it empty. This is the honeypot; anything that fills it is rejected.
- Optionally add a hidden `Source` field (for example the page or form name) so multiple forms can share one workflow.
- The sample form in the `assets` folder already includes both hidden fields and a small script that posts JSON and shows the success message.

Step 5: AI triage (optional)

- Add your OpenAI credential on **OpenAI — Chat Model**. That is all that is required.
- To change categories or urgency rules, edit the prompt in **AI — Triage Submission** and the example in **Parser — Triage JSON** so they match.
- To run without AI, delete the three AI nodes and connect **IF — Valid Submission** (true) directly to **Set — Assemble Lead Record**. Leads will be logged as `General`.

Usage

1. **Activate** the workflow, then submit a test message from your form.
2. Confirm the browser receives a success response, a row appears in your SharePoint list, and the notification arrives with a `.vcf` attachment and a subject like `[Sales · Normal] New inquiry from Jane Smith`.
3. If the auto-reply is enabled, check the submitter's inbox for the confirmation with your contact card attached.
4. Test the spam path by submitting a message with more than three links; it should be logged as `Rejected` with no email sent.
5. Use the **Status** column in your SharePoint list as a simple lead tracker: change `New` to `Contacted` or `Closed` as you work the list.

Troubleshooting

- **Form shows an error or hangs:** the workflow must be active and the URL must be the production webhook, not the test URL. Check for CORS if you post with JavaScript from another domain.
 - **Everything is rejected:** make sure the honeypot field is empty on real submissions and that the email field is named `Email` (or a recognized variant).
 - **No row in the SharePoint list:** verify the placeholder ID(s), the credential, and that all 12 columns exist with matching names.
 - **AI category is always General:** the AI node failed; open the execution and check the OpenAI — Chat Model error (usually a missing credential or quota).
 - **Email sent but no vCard:** confirm `attachLeadCard` / `attachCompanyCard` are `true` in the configuration node.
 - **Auto-reply lands in spam:** send from a mailbox with proper SPF/DKIM and keep `autoReplyMessage` free of links.
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Support

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