



N8N-Website-Chatbot (staging preview)

Setup & User Guide

Overview

The **N8N-Website-Chatbot (staging preview)** is an advanced workflow for [n8n](#) that enables responsive, AI-powered chat automation on your website. Integrating with AI models (via OpenAI or Azure), Microsoft 365 services (Outlook, Teams, Graph), CRM systems, and your site's content, it features:

- Real-time chatbot assistance, with greeting detection and AI response
- Customer booking, team notification, and live availability checks
- CRM and lead data parsing, updating, and deduplication
- Website/blog/product data search and onsite knowledge base Q&A
- Scheduled knowledge base updates and automated knowledge digests

Use Cases: SaaS support chat, product queries, demo bookings, knowledge base surfacing, CRM/lead funnel automation, internal team notifications, and more.

Prerequisites

1. **n8n Instance:** Access (cloud or self-hosted) to an up-to-date [n8n](#) installation, with at least `v1.38.0` or later recommended.
2. **API Access:**

- **OpenAI or Azure OpenAI:** API key for GPT-based AI models
 - **Microsoft 365 (Graph API):** Credentials for Outlook & Teams (for booking, notifications, calendar & email)
3. **Website Chat Integration:** The ability to embed or connect the n8n chatbot (via your frontend/web provider or supported widget).
 4. **CRM & Knowledge Base** (Optional): Connection details for your lists, CRM, site/blog/product endpoints, or Excel sheets.

Installation

1. Download the Workflow JSON

Save the exported `N8N-Website-Chatbot (staging preview)` workflow JSON to your computer.

2. Import into n8n

1. Log in to your n8n instance with sufficient privileges.
2. Go to **Workflows** → **Import** → **From File** (or **Paste JSON**).
3. Select and upload your JSON export or paste into the editor.
4. Review and **activate** the workflow once configuration is complete.

3. Install Required n8n Nodes

- Ensure `@n8n/n8n-nodes-langchain` and all `n8n-nodes-base` modules are present/enabled.

Note: You may need admin privileges to install additional npm packages or custom nodes, depending on your n8n environment.

Configuration

After importing, review and customize all `YOUR_*` placeholders and set up credentials as required.

Placeholder Explanations

Placeholder	Description	Where Used
<code>YOUR_EMAIL</code>	The email address used to send notifications (booking confirmations, team digests, etc.). Example: <code>chatbot@yourdomain.com</code>	Booking, notification, and summary email nodes
<code>YOUR_TENANT</code>	Microsoft 365/Azure tenant ID for Graph API integrations. Example: <code>e4a8e1d3-xxxx-xxxx-xxxx-7aa02f7bbb18</code>	Microsoft Graph / Outlook / Teams credential nodes
<code>YOUR_SITE_ID</code>	The Site ID or SharePoint site identifier if referencing SharePoint or OneDrive data for KB/CRM. Example: <code>contoso.sharepoint.com,abcd1234-xyz</code>	Knowledge base, CRM, or Excel Online connection nodes
<code>YOUR_CRM_LIST_ID</code>	The unique identifier of your CRM/Leads list (in SharePoint, Excel, or your system).	CRM data fetch and updating nodes

<code>YOUR_COMPANY</code>	Your company name (for email templates, KB digests, notifications).	Email and text templates
<code>YOUR_WORKBOOK_ITEM_ID</code>	The ID of the target Excel workbook (OneDrive/SharePoint) for leads/CRM storage.	Excel row/column fetch and update nodes

Credential Setup

1. OpenAI / Azure OpenAI

- **Type:** API Key (for OpenAI) or Azure resource credentials.
- **Purpose:** Required by the AI assistant nodes to generate chat responses and process prompt chains.

2. Microsoft Graph API

- **Type:** OAuth2 application or delegated permissions for Graph (Outlook, Teams, Excel).
- **Purpose:** Enables calendar sync, appointment creation, Outlook/Teams messages, and SharePoint/excel list access.
- **Required Scopes:** See [Microsoft Graph permissions reference](#) - typical scopes include `Calendars.ReadWrite`, `Mail.Send`, `Sites.Read.All`, `User.Read`, `Files.ReadWrite`.

3. Website Chat Service

- If using a 1st/3rd-party chat widget, you must provide credentials, webhook, or OAuth as applicable for message relays between site and this workflow.

4. CRM / API Tokens

- If integrating with external CRM or lead management, create the necessary custom credentials (API tokens, base URLs) in n8n's Credentials section.

Important: You must fill in all placeholders and credential fields before activating. Failure to do so will result in errors or blocked API calls.

Usage

1. Chatbot Operation

Deploy/embed your chat widget as directed by your frontend, and ensure its endpoint is directed to n8n's webhook or trigger node.

- Visitors can send chat messages (greetings are auto-responded; all other inputs are processed via the AI assistant).
- The bot may recognize booking, CRM, lead, search, or help intents. Relevant tools/workflows are invoked via sub-nodes.

2. AI-Powered Responses

- Natural language inputs are sent to GPT-4.1 via the LangChain integration. The context buffer maintains short user/assistant history for tailored replies.
- AI can trigger tool workflows—like check availability, book meetings, parse leads, or search KB—automatically, based on user intent.

3. Calendar Bookings / Appointment Scheduling

- The workflow checks available time slots, verifies conflict-free windows, and creates meetings directly in Microsoft/Teams calendars.
- Users and staff are notified via Outlook as confirmation.

4. CRM / Lead Management

- User or form data is parsed, normalized, deduplicated, and recorded/updated in your Excel/SharePoint CRM lists.

5. Content & Knowledge Base Search

- Visitor queries may return results spanning your product posts, blog, and internal KB articles, formatted clearly in chat replies.

6. Knowledge Base Updates & Digest

- A scheduled node refreshes your data sources weekly; digests or summaries are auto-emailed to your team or stakeholders.

7. Error Flows & Fallbacks

- All user and bot flows provide failsafes, with helpful error messages sent if API/data/validation fails.

- **To test:** Send "Hello" (should receive an automated greeting), then try "Book a demo" or "Find blog post about onboarding".
- For admin: Review logs in n8n and email for team digests and booking notifications.

Troubleshooting

- **Chatbot does not respond:**

- Check that triggers are correctly set to receive messages from your website chat widget.
- Ensure the workflow is **active**.
- Review n8n execution logs for trigger activity or errors.

- **API or Credential Errors:**

- Confirm all `YOUR_*` placeholders and API credentials are correct and **test them individually** in n8n's Credentials section.
- If using Microsoft Graph, ensure your tenant/app consent has been granted for all required scopes.
- Validate the OpenAI API key is live and has sufficient quota.
- **No Calendar or Booking Availability:**
 - Verify that the primary user calendar is accessible from Graph.
 - Review blocked slots, buffer times, or calendar conflicts in the Calculate Free Slots and Check Booking nodes.
- **CRM/Lead Data Not Syncing:**
 - Check CRM list (Excel/SharePoint) ID and access credentials.
 - Ensure proper mapping of fields & columns in workflow nodes and that Excel/SharePoint sharing permissions are up to date.
- **Emails Not Sent or Land in Spam:**
 - Validate Outlook or email connector credentials/permissions.
 - Add your sender as a safe sender in your corporate mail system.
- **AI Doesn't Answer Questions As Expected:**
 - Increase tokens or adjust parameters in the OpenAI node configuration.
 - Ensure the knowledge base and context buffer are up to date and successfully refreshed on schedule.
- **General Workflow Hangs/Errors:**
 - Check all HTTP, API, and code nodes for log errors or returned status codes.
 - All failures should produce chat or email feedback to admin or user for easier diagnosis.

Debug Tip: Use n8n's built-in "Execution" history to trace step-by-step payloads and identify where data or auth is missing.

Support

For implementation guidance, troubleshooting, or customization, contact our US-based support team:

- Email: support@ais.email
- Phone: [404-293-0331](tel:404-293-0331)
- Web: automatedintelligentsolutions.com

AI Solutions, Inc. offers white-glove onboarding, workflow design, and ongoing managed automation for this chatbot and your broader AI integration needs.

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