N8N-Pricing Proposal Generator

Setup & User Guide

Overview

The **N8N-Pricing Proposal Generator** is an automated workflow template designed to streamline creation and delivery of customized pricing proposals. Leveraging n8n as the orchestration engine, this workflow listens for pricing requests, fetches pricing and product data, builds a professional proposal in PDF format, and delivers it via email—all automatically.

Key Features:

- **Automated intake** via webhooks (connects to internal portals or forms).
- **Centralized pricing**—reads source data directly from Microsoft Excel files.
- **Fully customizable proposal output** (HTML & PDF styling).
- **Seamless email delivery** via Outlook for sales/customer teams.
- **Easy to deploy, modify, and scale** for additional product lines or pricing approaches.

Prerequisites

- **n8n Instance** – Self-hosted, cloud, or desktop version (v1.0+ recommended).
- **Microsoft Excel & OneDrive/SharePoint Access** – The pricing sheet must be accessible from n8n via API.
- **Microsoft Outlook Account** – To send proposal emails via Microsoft 365.
- **Gotenberg PDF Service** – A reachable Gotenberg instance for HTML-to-PDF conversion.
- **API/Webhook Consumer** – A form or application that will POST pricing requests to n8n.
- n8n credentials:
  - Microsoft Excel OAuth2 API

- Microsoft Outlook OAuth2 API
- HTTP Basic Auth for Gotenberg PDF

Installation

1. Open your n8n dashboard and select **Workflows > Import from File** or **Import from Clipboard**.
2. Paste/upload the provided JSON for **N8N-Pricing Proposal Generator**.
3. The workflow will appear with all nodes and connections. Review for completeness and save.
4. Continue to the configuration section to map placeholders and set up credentials.

> **Best Practice:** Use a separate *production* and *test* workflow for validation before live deployment.

Configuration

Placeholder Values to Update

Placeholder	Description & How to Configure
YOUR_LOGO_URL	**Logo to appear on proposal documents.** Replace with your company logo URL (e.g. `https://company.com/logo.png`). Used in the "Generate HTML Proposal" node.
YOUR_GOTENBERG_INSTANCE	**Endpoint for PDF conversion.** The base URL of your Gotenberg server—for example: `http://localhost:3000` or a cloud address. Used in "Convert HTML to PDF" node's HTTP Request settings.
YOUR_INTERNAL_EMAIL	**Sender email address or 'from' field.** Used in "Send Proposal via Email" node.

Placeholder	Description & How to Configure
	Set to the appropriate mailbox or shared address—e.g. `proposals@yourcompany.com`.

Credential Types to Create & Assign

Credential Name	Used By Node	How to Set Up in n8n
Microsoft Excel OAuth2 API	Retrieve Pricing Details	1. In n8n, go to **Credentials > New Credential**. 2. Select **Microsoft Excel OAuth2 API**. 3. Grant access to the correct OneDrive/SharePoint location. 4. Save and link this credential to the **Retrieve Pricing Details** node.
Microsoft Outlook OAuth2 API	Send Proposal via Email	1. Under **Credentials**, add **Microsoft Outlook OAuth2 API**. 2. Authenticate with the sending account or shared mailbox. 3. Attach this credential to the **Send Proposal via Email** node.
HTTP Basic Auth	Convert HTML to PDF	1. Navigate to **Credentials**, add **HTTP Basic Auth**. 2. Enter your Gotenberg service credentials (if required—optional for open Gotenberg instances). 3. Assign to the **Convert HTML to PDF** node.

Webhook Setup

- The workflow exposes a **POST** webhook:
  - **Path:** `/webhook/pricing-request` (append to your n8n base URL)

- Forward POSTs from your intake form or CRM here with all required request data (e.g., contact details, requested products/quantities, etc.)

Usage

1. **Send a test pricing request:**
   - Use an HTTP client (Postman, curl, webform) to POST sample data to `https://your-n8n-domain/webhook/pricing-request`.

2. **Workflow processes the request automatically:**
   1. *When Pricing Request Received:* Listens on the configured webhook.
   2. *Retrieve Pricing Details:* Fetches latest prices from your Excel sheet.
   3. *Extract Form Data:* Maps incoming fields to product and contact info.
   4. *Generate HTML Proposal:* Automatically builds a branded HTML proposal using your logo and calculated prices.
   5. *Convert HTML to PDF:* Sends the HTML to **YOUR_GOTENBERG_INSTANCE** for conversion.
   6. *Send Proposal via Email:* Emails the PDF to the recipient (and/or internal stakeholders) via Outlook.

3. **Check recipient inbox:**
   - Confirm the proposal arrived, with your branding and correct pricing.
   - Review attachment (PDF) for formatting fidelity.

4. **Tip:** Adjust the price calculation logic or HTML formatting by editing the "Extract Form Data" or "Generate HTML Proposal" nodes as needed.

Troubleshooting

- **Webhook not triggering?**
  - Confirm endpoint URL and method (`POST`) are correct.
  - Check n8n workflow status—should be **Active**.

- **Data not pulled from Excel?**

- Verify Microsoft Excel OAuth2 credential is authorized and not expired.
- Check spreadsheet path, file name, and tab reference in the node configuration.

- **PDF not generated?**
  - Test connectivity to your Gotenberg instance from the n8n server.
  - Validate all required authentication for HTTP Basic Auth (if enabled on Gotenberg).
  - Inspect returned data from the "Convert HTML to PDF" node for error codes/messages.

- **Email not sent?**
  - Ensure the Microsoft Outlook credential is valid and assigned to the node.
  - Check spam/junk folders or recipient address typos.

- **Proposal not formatted as expected?**
  - Edit the HTML in "Generate HTML Proposal" (adjust template code, add fields, update logo).

> **Logs & Debugging:** Use **n8n's execution log** for step-by-step insights and error messages at each workflow node.

Support

- For workflow assistance, credential setup, or customizations, contact our team or visit our knowledge base.
- We'll help ensure your proposal process is **fast, accurate, and professional**—every time.

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