

Quick Start Guide - 5 Minutes to Your First Lead

Get your workflow running in 5 minutes with this fast-track guide.

Prerequisites (2 minutes)

- ☐ n8n instance running (cloud or self-hosted)
 - ☐ Slack workspace access
 - ☐ Email account (Gmail works)
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Step 1: Import Workflow (30 seconds)

1. Open n8n
2. Click **"Workflows"** → **"Import from File"**
3. Select `realtor-lead-workflow.json`
4. Click **"Import"**

✅ Workflow is now in your n8n instance!

Step 2: Minimal Setup (2 minutes)

A. Configure Slack (60 seconds)

1. Click the **"Slack Alert"** node
2. Click **"Create New Credential"**
3. Go to <https://api.slack.com/apps>
4. **Create New App** → "From scratch"
 - App Name: `n8n Leads`
 - Workspace: Select yours
5. **OAuth & Permissions** → **Scopes** → Add:
 - `chat:write`
 - `chat:write.public`
6. Click **"Install to Workspace"** → **"Allow"**
7. Copy the **OAuth Access Token** (starts with `xoxb-`)
8. Paste into n8n credential → **Save**
9. In node settings, change channel to `#general` (or your channel)

B. Configure Email (60 seconds)

Using Gmail:

1. Click **"Email to Lead"** node
2. Create **SMTP credential**:
 - Host: `smtp.gmail.com`
 - Port: `465`
 - Secure: `Yes (SSL/TLS)`
 - User: `your-email@gmail.com`
 - Password: **[App Password - see below]**

Get Gmail App Password:

- Google Account → Security → 2-Step Verification (enable it)
 - **App passwords** → Generate → Select "Mail"
 - Copy 16-character password → Paste in n8n
3. Change `fromEmail` to your actual email

C. Skip SMS & CRM for Now

1. Click **"SMS to Lead (Twilio)"** node
2. Click **"Deactivate Node"** (or delete it)
3. Same for **"Create CRM Contact (HubSpot)"** node

You can add these later!


Step 3: Update Agent Info (30 seconds)

1. Click **"Assign Agent"** Code node
2. Replace agent info with yours:

```
const agents = [  
  {  
    id: 1,  
    name: 'YOUR NAME',  
    email: 'your-email@example.com',  
    phone: '+1234567890',  
    slack_id: '@yourslackname'  
  }  
];  
  
const manager = {  
  name: 'YOUR NAME',  
  email: 'your-email@example.com',  
  phone: '+1234567890',  
  slack_id: '@yourslackname'  
};
```

3. Click **"Save"**
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Step 4: Activate Workflow (10 seconds)

1. Click **"Activate"** toggle (top right)
2.  Workflow is now LIVE!
3. Copy your webhook URL (shown in webhook node):

```
https://your-instance.n8n.cloud/webhook/realtor-lead
```

Step 5: Test It! (1 minute)

Method A: Using curl (Terminal/Command Prompt)

```
curl -X POST https://your-instance.n8n.cloud/webhook/realtor-lead \
-H "Content-Type: application/json" \
-d '{
  "name": "Test Lead",
  "email": "test@example.com",
  "phone": "+1234567890",
  "property_address": "123 Test Street",
  "message": "Just testing the workflow!",
  "source": "test"
}'
```

Method B: Using Postman/Insomnia

1. New POST request
2. URL: Your webhook URL
3. Body → JSON:

```
{
  "name": "Test Lead",
  "email": "test@example.com",
  "phone": "+1234567890",
  "property_address": "123 Test Street",
  "message": "Just testing the workflow!",
  "source": "test"
}
```

4. Send!


Method C: Using the Test File

```
curl -X POST https://your-instance.n8n.cloud/webhook/realtor-lead \
-H "Content-Type: application/json" \
-d @webhook-test-payload.json
```


Expected Results

Within **5 seconds**, you should see:

1.  **Slack message** in your channel:

 **NEW LEAD** - Respond within 5 minutes!

Lead: Test Lead
Phone: +1234567890
Email: test@example.com
...

2.  **Email sent** to `test@example.com` (check spam folder)

3.  **n8n execution log** shows green checkmarks
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Next Steps

Now Working? Great! 🎉

Add the features you skipped:

1. **SMS Integration** (10 minutes)
 - See [README-SETUP.md](#) → SMS Provider section
 - Sign up for Twilio (free trial includes \$15 credit)
 - Update SMS node with credentials
 2. **CRM Integration** (15 minutes)
 - Choose: HubSpot (free), Airtable (easy), or Salesforce
 - See [INTEGRATION-GUIDE.md](#) → CRM section
 - Configure credentials
 3. **Connect Real Lead Sources** (varies)
 - See [INTEGRATION-GUIDE.md](#)
 - Options: Zillow, Realtor.com, Facebook, Web Forms
 4. **Fix the Response Check** (5 minutes)
 - The "Check Agent Response" node is currently a mock
 - Replace with actual CRM query
 - See [README-SETUP.md](#) → "Customize Response Check Logic"
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Troubleshooting

"Workflow execution failed"

1. Click on the red node to see error
2. Check credentials are saved
3. Verify channel name in Slack node
4. Check email settings

"No Slack message received"

1. Verify channel exists (or use `#general`)
2. Check Slack app has `chat:write` permission
3. Re-install Slack app if needed
4. Check n8n execution log for errors

"Email not sending"







1. Verify Gmail App Password (not regular password)
2. Check 2-Step Verification is enabled
3. Try different SMTP port (587 instead of 465)
4. Check spam folder

"Webhook URL doesn't work"

1. Verify workflow is **activated** (toggle on)
 2. Check URL path exactly matches (case-sensitive)
 3. Use POST method, not GET
 4. Set Content-Type header to `application/json`
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What Just Happened?

Your workflow is now:

1.  Listening for leads 24/7
2.  Sending instant Slack alerts
3.  Emailing leads immediately
4.  Assigning agents automatically
5.  Waiting 10 minutes
6.  Escalating if no response

All automatically. No manual work.

Usage Tips

Daily Operations

1. **Check Slack** - All leads appear there instantly
2. **Respond Fast** - You have 10 minutes before escalation
3. **Update CRM** - Mark leads as "contacted" to prevent escalation

Monitoring

- **n8n Dashboard** → **Executions** tab
- See all workflow runs
- Green = success, Red = error
- Click any execution to see details

Analytics (Advanced)

Add a Code node to log metrics:

- Average response time
 - Escalation rate
 - Conversion by source
 - Agent performance
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Cost Estimate (Minimal Setup)

With just Slack + Email (no SMS/CRM):

Service	Cost
n8n Cloud	\$20/mo (or \$0 self-hosted)
Slack	Free
Gmail	Free

Total	\$20/mo (or \$0 if self-hosted)
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ROI: Closing 1 extra deal per year pays for decades of this system.

Full Setup (When Ready)

See the complete guides:

- [README-SETUP.md](#) - Full feature setup
 - [INTEGRATION-GUIDE.md](#) - Lead source integration
 - [webhook-test-payload.json](#) - Test data
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Support

- **n8n Docs:** <https://docs.n8n.io>
 - **n8n Community:** <https://community.n8n.io>
 - **Workflow Issues:** Check execution logs in n8n
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 **Congratulations! You now have a professional lead response system that ensures no lead is lost!**

Next: Connect it to your real lead sources and never miss a deal again.