

Lab 5: Request Intake, Your First Workflow

AI Administrator · Day 3 · Session 5 · Automation Basics with n8n

Participant lab handout

Objective

Build the classic first automation: a request form whose submissions are logged to a Google Sheet and acknowledged by e-mail, with a branch that flags large requests, a guard for incomplete requests, and retry and error handling. You will reuse these four node types (Form, Google Sheets, IF, Gmail) in every later module.

Time: 40 minutes in breakout rooms. Finish at home before Session 6 if needed. **Deliverable:** below.

What you need

- Your **n8n Cloud** workspace (opened at the start of this session).
- A **Google account** with Sheets and Gmail. The sheet and the n8n connection must use **the same account**.
- **Day3_S5_Requests_Template.xlsx** (optional: you can type the headers yourself).

Words used by today's n8n: **Execute step** runs one node, **Execute workflow** runs the whole workflow once, **Publish** makes it live. Older guides, including the module page, say "Test step" and "Activate"; they mean the same.

Steps

1. Prepare the sheet

In Google Sheets create a sheet called **Requests** with this header row:

Timestamp	Name	Email	Department	Amount	Description	Status
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If you upload the template instead, open it and choose **File, Save as Google Sheets**. A green **XLSX** badge next to the name means n8n cannot read it yet.

2. Create the workflow and the trigger

In n8n: **Overview, Build a workflow**. Rename it **M5 Request intake** (click the name at the top). Click **Add first step**, choose **On form submission**. Give the form a title and add five fields:

Field	Type	Required
Name	Text	yes
Email	Email	no
Department	Dropdown: Finance, HR, IT, Operations	yes
Amount	Number	no
Description	Textarea	no

Leave Email and Amount optional on purpose: step 6 catches requests that leave them blank.

Click **Execute step**, open the **Test URL**, submit one sample request, and read the **output panel**: one item with your five fields.

3. Log the row

Add a **Google Sheets** node, operation **Append Row**. Credential: **Sign in with Google**, choose the account that owns your sheet, and **tick every box** on Google's consent screen. Select your spreadsheet and the **Requests** sheet. Map each column by dragging the matching field from the input panel on the left. For **Status** type the fixed value New. For **Timestamp** you can drag **submittedAt**. Execute the step and check that a row appears.

4. Branch on amount

Add an **IF** node after the Sheets node. Condition: drag **Amount**, choose **Number, is greater than**, value 500. Test with two submissions, one above and one below 500, and check which output (**true** or **false**) each item leaves by.

5. Two confirmation e-mails

On the **true** branch add **Gmail, Send a message**. To: drag **Email**. Subject: Request received – needs approval. Email type **Text**, body for example:

```
Hello {Name},
We have received your request for {Amount}. Because it is above 500 it will be
reviewed by a manager before processing. We will confirm within two working days.
Regards,
Operations
```

Replace {Name} and {Amount} by dragging the fields in. On the **false** branch add a second Gmail node, subject Request received – being processed. Use **Sign in with Google** for the Gmail credential.

6. Guard against incomplete requests

Insert an **IF** node directly after the form, called **Complete?**, with two conditions joined by **AND**:

- **Email**, String, **is not empty**
- **Amount**, Number, **is greater than 0**

Connect its **true** output to the Sheets node from step 3. On the **false** output add **Edit Fields (Set)** that sets **Status** to Incomplete (keep the other fields), then a second **Google Sheets, Append row** so the incomplete request is still logged. No e-mail leaves from this branch.

Why “greater than 0” and not “is not empty”: we tested it. When Amount is left blank, the n8n form sends **Amount = 0**, which is not empty. A guard on “not empty” lets it through, logs it as New and sends an e-mail.

7. Retry and an error notification

Open each Gmail node, tab **Settings**: switch on **Retry On Fail**, Max. Tries 3, Wait Between Tries 5000 ms.

Then create a second workflow, **Error notifier**: trigger **Error Trigger**, then **Gmail, Send a message** to yourself with the failed workflow’s name and the execution link (drag them from the Error Trigger output). Publish it. Back in **M5 Request intake**: the three-dots menu, **Settings, Error workflow**, choose **Error notifier**, save.

8. Test end to end, then publish

Click **Execute workflow** before each test (the test URL listens for one submission at a time) and submit three requests:

Test	Amount	Expected row	Expected e-mail
Complete and small	200	Status New	“being processed”
Complete and large	900	Status New	“needs approval”
Amount left blank	(blank)	Status Incomplete	none

Check the sheet has three rows with the right statuses and that you received two e-mails. Then click **Publish** (top right), copy the form’s **Production URL**, and open the **Executions** tab to see your runs.

Finally: the three-dots menu, **Export JSON**. Keep the file.

Deliverable

Saved as **M5-request-intake**:

1. A screenshot of the published workflow canvas.
2. The production form URL.
3. A screenshot of the Requests sheet showing the three test rows.
4. A screenshot of the Executions list.
5. The exported JSON file.

If you are stuck

Symptom	Likely cause
"403 Forbidden, the caller does not have permission" in a Sheets node	n8n is connected to a different Google account than the sheet's owner, or a consent box was unticked. Credential, Switch account.
The spreadsheet does not appear in the list	Same cause, or the file is an uploaded .xlsx (Save as Google Sheets).
"Form Submitted" but nothing in the editor	You did not click Execute workflow (or Execute step) before submitting.
900 goes to the false branch	The IF uses a String operator. Choose Number, is greater than.
Publish is greyed out	A node still shows a red triangle: a missing credential or a required field.
Two e-mails for one request	Two nodes connected to the same output by mistake. Check the arrows.

The solution workflow (**Day3_S5_Request_Intake_Solution.json**) is shared after the session. Import it with **Import, From file**, then connect your own Google account in its Sheets and Gmail nodes and paste your sheet link.