

Full Setup Guide: SMMA Reporting Automation in n8n

This guide will walk you through the entire process of setting up the provided n8n workflow. We'll cover setting up your Google Sheet, acquiring all necessary API credentials, and configuring the imported workflow node by node.

Part 1: Prepare Your Central Database (Google Sheets)

Before touching n8n, you need the place where your data will be stored and read from.

1. **Create a New Google Sheet:** Go to sheets.new to create a new spreadsheet. Name it something descriptive, like "SMMA Client Reporting Hub".
2. **Create the Client_List Sheet:**
 - Rename the first tab at the bottom to Client_List.
 - Create the following columns in the first row. The names must be **exactly** as written here:
 - ClientName
 - MetaAdAccountID
 - GoogleAdAccountID
 - TikTokAdvertiserID
 - ReportingEmail
 - SlackChannelID
 - LookerStudioLink
 - Status
3. **Create the Daily_Metrics_Data Sheet:**
 - Click the "+" icon at the bottom left to add a new sheet.
 - Rename this second tab to Daily_Metrics_Data.
 - Create the following columns in the first row:
 - Date
 - ClientName
 - Platform
 - Spend
 - Impressions
 - Clicks
 - CTR
 - Conversions
 - Reach

Your Google Sheet is now ready. **Keep the URL of this sheet handy; you'll need it later.**

Part 2: Get Your API Credentials

This is the most detailed part. You need to authorize n8n to access your various accounts.

A. Google Credentials (for Sheets, Ads, AI)

You'll create one set of credentials in the Google Cloud Platform that can be used for all Google services.

1. **Create a GCP Project:** Go to the [Google Cloud Console](#). Create a new project if you don't have one already.
2. **Enable APIs:** In your project, go to "APIs & Services" -> "Library". Search for and **enable** each of the following APIs:
 - o Google Sheets API
 - o Google Ads API
 - o Vertex AI API (This is for the Gemini model)
3. **Create OAuth 2.0 Credentials:**
 - o Go to "APIs & Services" -> "Credentials".
 - o Click "+ Create Credentials" -> "OAuth client ID".
 - o Select "Web application" as the application type.
 - o Under "Authorized redirect URIs", click "+ ADD URI".
 - o Go to your n8n instance, go to "Credentials" -> "New" -> "Google". Copy the "OAuth Redirect URL" provided there and paste it into the Google Cloud URI field.
 - o Click "Create". You will get a **Client ID** and a **Client Secret**.
4. **Add Credentials to n8n:**
 - o In n8n, go to "Credentials" -> "New".
 - o Search for "Google" and select it.
 - o Paste your Client ID and Client Secret. Click "Sign in with Google" and follow the authentication process. Save the credential. You'll use this single credential for all Google nodes.

B. Meta Ads Credentials

1. Go to [Meta for Developers](#) and create a developer account if needed.
2. Click "My Apps" -> "Create App". Choose "Business" as the app type.
3. From the app dashboard, find the "Marketing API" and click "Set up".
4. Go to "Tools" -> "Graph API Explorer".
5. Select your new App, select "Get App Token".
6. Go to your Business Manager -> Users -> System Users. Add or create a System User. Assign your ad accounts to this user with "Manage" permissions.
7. Generate a new token for this system user, selecting the ads_read and business_management scopes.
8. **Add Credential to n8n:** In n8n, go to "Credentials" -> "New" -> "Meta Ads". Paste the access token you generated.

C. TikTok Ads Access Token

1. Go to the [TikTok Marketing Developer](#) site and create a developer account.
2. Create a new app.
3. Once your app is created and approved, you can generate an Access Token from within

the App's dashboard. This token will be used directly.

D. Email (SMTP) Credentials

The easiest way is using a Gmail account with an "App Password".

1. Go to your Google Account -> "Security".
2. Enable 2-Step Verification if it's not already.
3. Go to "App passwords", create a new password for "Mail" on "Other (custom name)" and name it n8n.
4. Google will give you a 16-character password. **Copy this.**
5. **Add Credential to n8n:**
 - In n8n, go to "Credentials" -> "New" -> "SMTP".
 - **Host:** smtp.gmail.com
 - **Port:** 465
 - **User:** Your full Gmail address.
 - **Password:** The 16-character App Password you just copied.
 - Enable SSL.

E. Slack Credentials

1. Go to api.slack.com/apps and click "Create New App".
2. Choose "From scratch", name it, and select your workspace.
3. Go to "OAuth & Permissions". Scroll down to "Scopes" -> "Bot Token Scopes".
4. Add the chat:write permission.
5. Scroll back up and click "Install to Workspace".
6. After authorizing, you will get a "Bot User OAuth Token" (it starts with xoxb-). Copy this.
7. **Add Credential to n8n:** In n8n, "Credentials" -> "New" -> "Slack". Paste the xoxb-token.

Part 3: Import and Configure the n8n Workflow

1. **Import the JSON file:** Open n8n, click "New", then in the top-right, click the three dots (...) and choose "Import from file". Select the n8n_smma_workflow.json file.
2. **Configure Each Node:** Go through the workflow from left to right.
 - **Get Active Clients:**
 - In the "Credential" dropdown, select the Google credential you created.
 - In the "Document ID" field, paste the full URL or ID of your Google Sheet.
 - In "Sheet Name", make sure it correctly says Client_List.
 - **Fetch Meta Ads Data:**
 - Select the Meta Ads credential you created.
 - **Fetch Google Ads Data:**
 - Select the Google credential.
 - **Fetch TikTok Ads Data:**
 - In the "Header" section, replace YOUR_TIKTOK_ACCESS_TOKEN with the token you got from TikTok.
 - **Append to Daily_Metrics_Data:**

- Select the Google credential.
- Paste the same Google Sheet URL/ID as before.
- Make sure the "Sheet Name" is Daily_Metrics_Data.
- **Is it Monday?:** No configuration needed here.
- **Get Active Clients (for Report):** Configure exactly like the first Google Sheet node.
- **Read Last 7 Days Data:** Configure exactly like the "Append to Daily_Metrics_Data" node.
- **Generate AI Summary:** Select the Google credential (it uses the same one for Vertex AI/Gemini).
- **Send Email:** Select the SMTP credential you created.
- **Send Slack Message:** Select the Slack credential you created.

Part 4: Final Testing

1. **Populate the Client_List Sheet:** Add a row with your own test data. Use real Ad Account IDs that your credentials have access to. Put your email in the ReportingEmail column and "Active" in the Status column.
2. **Run a Manual Test (Data Aggregation):**
 - Click "Test workflow" at the bottom.
 - The workflow should run through the top branch. Click on the "Append to Daily_Metrics_Data" node after it finishes. You should see a green checkmark.
 - Check your Google Sheet. A new row of data should have appeared in the Daily_Metrics_Data tab.
3. **Run a Manual Test (Reporting):**
 - To test the reporting branch without waiting for Monday, click on the "Is it Monday?" node.
 - Temporarily change the value1 field from `{{ $now.weekdayLong === 'Monday' }}` to `true`.
 - Run "Test workflow" again.
 - This time, the workflow should proceed down the "true" path after the IF node. It will read the data, summarize it, and send you a report via email or Slack.
 - **Remember to change the IF node back to the Monday check after testing!**

Part 5: Go Live!

Once your tests are successful, all that's left is to activate the workflow.

1. Click the "Active" toggle at the top right of the screen to switch it from Inactive to Active.
2. **Save the workflow.**

Your automated SMMA reporting system is now live. It will run at 3 AM every day to collect data and send reports every Monday morning.