Setup Guide: Influencer Content & Brand Deal Automation

Welcome to your new Influencer Business Operating System! This guide provides a clear, step-by-step process for setting up your automation workflow in n8n. The most critical part is preparing your Airtable base correctly, as it acts as the central hub for everything.

Part 1: The Command Center - Setting Up Your Airtable Base

The n8n workflow is designed to work with a very specific database structure. You must follow these naming conventions exactly.

Step 1: Create the Base

1. Log in to Airtable.
2. Click "Add a base" and choose "Start from scratch".
3. Name your new base: Influencer Business OS.

Step 2: Create the Three Required Tables

Delete the default table and create these three, renaming them precisely as shown:

1. Brands
2. Deals
3. Deliverables

Step 3: Build the Brands Table

This is your client list.

Field Name	Field Type	Notes
Brand Name	Single line text	This is the Primary Field.
Contact Name	Single line text	
Contact Email	Email	
Deals	Link to another record	Link to the Deals table.

Step 4: Build the Deals Table

This table tracks each campaign.

Field Name	Field Type	Notes
Campaign Name	Single line text	This is the Primary Field.
Brand	Link to another record	Link to the Brands table.
Status	Single select	Options: 1. Accepted, 2. In Progress, 3. Complete, 4. Archived
Deliverables	Link to another record	Link to the Deliverables table.
Total Payout	Currency	
First Draft Due Date	Date	
Final Post Date	Date	
Required Hashtags	Single line text	e.g., #ad, #brandpartner
Required Mentions	Single line text	e.g., @brandaccount

Step 5: Build the Deliverables Table
This is your day-to-day task list. Each record is one piece of content.

Field Name	Field Type	Notes
Name	Single line text	Primary Field (e.g., "IG Reel - Product Demo").
Deal	Link to another record	Link to the Deals table.
Platform	Single select	Options: Instagram, TikTok, YouTube, Twitter.
Status	Single select	1. To Do, 2. Drafting, 3. Draft Ready for Review, 4. Awaiting Brand Approval, 5. Approved - Ready to Post, 6. Posted, 7. Invoiced, 8. Paid, 9. Complete
Draft Due Date	Date	
Post Date	Date	
Draft Link	URL	e.g., Link to a Google Drive file.
Draft Caption	Long text	The caption text for GPT to check.
Invoice Due Date	Date	
Post URL	URL	Add this after the content is live.
Views	Number (Integer)	Leave blank. n8n fills this.
Likes	Number (Integer)	Leave blank. n8n fills this.
Comments	Number (Integer)	Leave blank. n8n fills this.
Saves	Number (Integer)	Leave blank. n8n fills this.

Step 6: Add Lookup Fields (Very Important!)
The n8n workflow needs information from the Deals and Brands tables when it's looking at a Deliverable. We use "Lookup" fields to pull this data across.
In your **Deliverables table**, create the following fields:

1. **Campaign Name (from Deal)**:
   - Field Type: Lookup
   - "What field do you want to look up?": Select the Deal field.
   - "From the Deals table, look up this field:": Select Campaign Name.
2. **Brand Contact Email (from Brand)**:
   - Field Type: Lookup
   - "What field do you want to look up?": Select the Deal field. This will open another menu.
   - "From the Deals table, look up this field:": Select the Brand field. This opens a third menu.
   - "From the Brands table, look up this field:": Select Contact Email.
3. **Required Hashtags (from Deal)**:
   - Field Type: Lookup
   - Look up through the Deal field to pull Required Hashtags.
4. **Required Mentions (from Deal)**:
   - Field Type: Lookup
   - Look up through the Deal field to pull Required Mentions.

Your Airtable base is now correctly structured and ready for automation.

Part 2: Get Your API Credentials

Gather the keys that will allow n8n to talk to other apps.

- **Airtable:** Go to your Airtable account page, generate a new API key, and copy it. In n8n, create a new "Airtable API" credential and paste the key.
- **Google (for Calendar & AI):**
    1. Go to the Google Cloud Console.
    2. Create a new project.
    3. Go to "APIs & Services" -> "Library".
    4. Search for and **Enable** both the Google Calendar API and the Vertex AI API.
    5. Go to "Credentials", create an "OAuth 2.0 Client ID", and follow the steps.
    6. In n8n, create a new "Google OAuth2 API" credential and use the Client ID and Secret you just generated.
- **Gmail (SMTP):**
    1. Go to your Google Account's security settings.
    2. Set up 2-Factor Authentication if you haven't already.
    3. Go to "App Passwords", generate a new password for "Mail" on "Other".
    4. In n8n, create a new "SMTP" credential with smtp.gmail.com as the host and use your new App Password.

Part 3: Import and Configure the n8n Workflow

1. **Import:** Download the n8n_influencer_deal_workflow.json file and import it into your n8n canvas via the "Import from File" option.
2. **Configure:** Go through each node in the workflow. Any node that needs your attention will likely be marked with a small red circle.
    - **Airtable Nodes:** Click on each one, select the Airtable credential you created, and paste in your **Base ID** and **Table ID** from Airtable.
    - **Google Nodes:** Select the Google credential you created.
    - **Email Nodes:** Select your SMTP credential. **Important:** Change the recipient in the "Send Draft Reminder" and "Notify Influencer of Fail" nodes from the placeholder to your actual email address.
    - **HTTP Request Node:** This is a placeholder. If you're using an external service for social media metrics, configure the URL and credentials here. If not, you can ignore or delete it.

Part 4: Final Testing

Test each automation branch separately to ensure everything works before activating it.

1. **Deal Onboarding Test:** In Airtable, create a new Deal with the status 1. Accepted. Manually run the workflow in n8n. Check your Google Calendar for the new events and verify the Deal status changed to 2. In Progress.
2. **Reminders Test:** Create a Deliverable with a Draft Due Date of tomorrow. Run the workflow. Check your email for the reminder.
3. **Approval Flow Test:** Create a Deliverable with status 3. Draft Ready for Review. Write a caption in the Draft Caption field that is *missing* a required hashtag. Run the workflow. You should get a "FAIL" email. Now, fix the caption and run it again. The brand's email

should receive the approval request.
4. **Payment Reminders Test:** Create a Deliverable, set its status to 7. Invoiced, and set the Invoice Due Date to yesterday. Run the workflow. The brand should receive a payment reminder email.

Once you've confirmed all parts are working, you can activate the workflow using the toggle in the top-right corner of n8n. Your business is now automated!