Full Setup Guide: Influencer Payment & Payout Automation in n8n

This guide provides a complete walkthrough for setting up the influencer payment automation workflow. It covers the crucial first step of preparing your Airtable base, then explains how to get all required API keys, and finally, how to configure the n8n workflow you've imported.

Part 1: Prepare Your Central Database (Airtable)

Airtable will act as your "single source of truth" for the status of every deal. Proper setup here is critical.

1. **Create a New Airtable Base:** Start with a fresh base. Name it "Agency Operations Hub" or similar.
2. **Create a Deals Table:** Create one table and name it Deals.
3. **Set Up Fields:** Create the following fields in your Deals table. The field names and types must be exact for the n8n workflow to function correctly.

Field Name	Field Type	Notes
Campaign Name	Single line text	The name of the campaign.
Status	Single select	Options: 1. Approved for Invoicing, 2. Invoiced - Awaiting Payment, 3. Paid - Payout Initiated, 4. Complete
Brand Contact Name	Single line text	
Brand Contact Email	Email	
Brand Contact Phone	Phone number	Include country code (e.g., +15551234567).
Brand Quickbooks Customer ID	Number (Integer)	The customer ID from your QuickBooks account for this brand.
Deal Value	Currency	The total amount the brand will be invoiced.
Invoice Due Date	Date	Set this when the deal is approved.
Influencer Name	Single line text	
Influencer Email	Email	
Influencer Payout Amount	Currency	The amount to be paid to the influencer.
Influencer Wise Target ID	Number (Integer)	The influencer's Wise "Target Account ID" for payouts.
Quickbooks Invoice ID	Single line text	**(Leave Blank)** n8n will populate this automatically.

Wise Payout ID	Single line text	**(Leave Blank)** n8n will populate this automatically.

Your Airtable base is now the command center for this automation.

Part 2: Get Your API Credentials

1. **Airtable:**
   - Go to your Airtable account page.
   - Generate a new API key. Copy it.
   - In n8n, go to Credentials -> New -> Airtable, and paste the key.
2. **QuickBooks Online:**
   - Sign up for a QuickBooks Developer account.
   - Create a new app.
   - On your app's dashboard, go to the "Keys & OAuth" section. You'll find a **Client ID** and **Client Secret**.
   - In n8n, go to Credentials -> New -> QuickBooks. Copy the "OAuth2 Redirect URL".
   - Back in the QuickBooks developer portal, add this URL to the "Redirect URIs" list for your app.
   - In n8n, paste your Client ID and Secret and follow the sign-in process.
3. **Twilio (for WhatsApp):**
   - Sign up for a Twilio account.
   - Get a phone number that is WhatsApp-enabled. Follow their guide to connect it to the WhatsApp Business API.
   - From your Twilio console dashboard, you will find your **Account SID** and **Auth Token**.
   - In n8n, go to Credentials -> New -> Twilio. Paste the Account SID and Auth Token.
4. **Wise (for Payouts):**
   - Sign up for a Wise Business account.
   - Go to Settings -> API tokens.
   - Generate a new **full access** API token. Copy it.
   - In n8n, go to Credentials -> New -> Bearer Token. Name it "Wise Bearer Token" and paste the API token.
5. **Gmail (SMTP):**
   - Follow the guide in the previous document (setup_guide.md) under section D. Email (SMTP) Credentials to create a Google App Password.
   - Add this as an SMTP credential in n8n.

Part 3: Import and Configure the n8n Workflow

1. **Import the JSON file** (n8n_influencer_payment_workflow.json) into your n8n canvas.
2. **Update Placeholders:** You must go through the workflow and replace every placeholder with your actual credentials and IDs.
   - **All Airtable Nodes:**
     - Select your Airtable credential.

        - Replace YOUR_AIRTABLE_BASE_ID with the actual Base ID (from the Airtable URL).
        - Replace YOUR_DEALS_TABLE_ID with the Table ID.
    - **QuickBooks Nodes:**
        - Select your QuickBooks credential.
    - **Send Email / Reminder Nodes:**
        - Select your SMTP credential.
    - **Send WhatsApp Escalation:**
        - Select your Twilio credential.
        - Replace whatsapp:YOUR_TWILIO_WHATSAPP_NUMBER with your Twilio WhatsApp number (e.g., whatsapp:+14155238886).
    - **Trigger Payout via Wise:**
        - Select the "Wise Bearer Token" credential you created.
        - Update the body with your actual source account ID and any other required fields from the Wise API docs.

Part 4: Final Testing

Test each of the three main branches of the workflow separately.

1. **Test Branch 1 (Invoice Creation):**
    - Create a new record in your Airtable Deals table. Fill in all the "Brand" and "Deal" details. Set the **Status** to 1. Approved for Invoicing.
    - In n8n, click "Test workflow".
    - Check the brand contact's email; they should have received an invoice.
    - Check your Airtable record; the status should now be 2. Invoiced - Awaiting Payment, and the QuickBooks ID should be filled in.
2. **Test Branch 2 (Reminders):**
    - In an Airtable record, set the **Status** to 2. Invoiced - Awaiting Payment and set the **Invoice Due Date** to be 3 days from now.
    - Click on the "Due in 3 Days?" IF node and click the "play" icon on that node to test just that path.
    - The workflow should send the polite reminder email.
    - Repeat the test for the "Due Today?" and "7 Days Overdue?" paths by changing the date in Airtable.
3. **Test Branch 3 (Payouts):**
    - Manually create an invoice in QuickBooks for a test customer. Mark it as paid.
    - In Airtable, create a corresponding deal record. Set the **Status** to 2. Invoiced - Awaiting Payment and paste the QuickBooks Invoice ID into the correct field. Fill out all the "Influencer" details.
    - Click "Test workflow" in n8n.
    - The workflow should find the paid invoice, find the matching Airtable record, trigger the (test) payout, update the status in Airtable to 3. Paid - Payout Initiated, and send the notification email to the influencer.

Part 5: Go Live!

After successfully testing all branches, activate the workflow using the toggle in the top right and save it. Your agency's payment and payout system is now running on autopilot.