Full Setup Guide: Event Vendor & Task Automation in n8n

This guide provides a comprehensive walkthrough for setting up the event management automation workflow. This system uses Airtable as its central database, so the initial setup is the most critical part of the process.

Part 1: Prepare Your Central Database (Airtable)

This Airtable base is the brain of your operation. The n8n workflow reads and writes information here, so the table and field names must be **exact**.

1. **Create a New Airtable Base:** Name it "Event Operations Hub".
2. **Create Four Tables:** You will need the following four tables.

Table 1: Events

This table holds high-level information about each event.

Field Name	Field Type	Notes
Event Name	Single line text	Primary field.
Event Start Date	Date	
Event End Date	Date	
Status	Single select	Options: 1. New, 2. In Progress, 3. Completed, 4. Archived
Vendor Tasks	Link to Vendor_Tasks	Allow linking to multiple records.
Total Budget	Currency	
Actual Spend	Rollup	Roll up the Contract Value field from Vendor Tasks.

Table 2: Vendors

Your contact list for all vendors.

Field Name	Field Type	Notes
Vendor Name	Single line text	Primary field.
Contact Name	Single line text	
Contact Email	Email	
Contact Phone	Phone number	
Tasks	Link to Vendor_Tasks	Allow linking to multiple records.

Table 3: Vendor_Tasks

The core operational table where all tasks are tracked.

Field Name	Field Type	Notes
Task Name	Single line text	Primary field (e.g., "Catering Service").
Event	Link to Events	
Vendor	Link to Vendors	
Status	Single select	1. Assigned, 2. In Progress, 3. Deliverable Submitted, 4. Complete, 5. Delayed
Deliverable Description	Long text	
Deadline	Date	The date the task must be completed by.
Completed Date	Date	Manually enter when the task is fully complete.
Contract Value	Currency	
Payment Status	Single select	1. Pending Approval, 2. Approved, 3. Paid
Payment Due Date	Date	
On-Site Check-In	Checkbox	For the live event-day dashboard.
Lookup Fields	Lookup	Create lookups to pull in Vendor and Event details (like names and emails) into this table for n8n.

Table 4: Vendor_Templates

This table stores the default tasks needed for every new event.

Field Name	Field Type	Notes
Task Type	Single line text	Primary field (e.g., "Catering", "Lighting", "Security").
Default Deliverable Description	Long text	A template description for this task type.
Typical Lead Time (Days)	Number (Integer)	How many days before the event this task should be created. (This field is not used in the current workflow version but is good practice to include).

Part 2: Get Your API Credentials

You will need credentials for:

- **Airtable:** Get your API key from your Airtable account page.
- **Slack:** Create a new Slack App and get the Bot User OAuth Token (xoxb-...). It needs the chat:write scope.
- **Gmail (SMTP):** Create a Google App Password for your account.
- **Google AI (for Gemini):** Enable the "Vertex AI API" in a Google Cloud project and create an API key.

Add each of these to the "Credentials" section in your n8n instance.

Part 3: Import and Configure the n8n Workflow

1. **Import the JSON file** (n8n_event_vendor_workflow.json) into your n8n canvas. The workflow is large and has multiple branches.
2. **Update Placeholders:** Go through each node that has a "YOUR_..." placeholder and update it.
    - **All Airtable Nodes:** Select your credential and replace YOUR_AIRTABLE_BASE_ID and the table IDs (tbl...) with the actual IDs from your Airtable base.
    - **Slack Nodes:** Select your Slack credential and replace the Channel ID placeholders (YOUR_..._SLACK_CHANNEL_ID) with the actual channel IDs (e.g., C012345678).
    - **Email Nodes:** Select your SMTP credential. Update the To: address in the final report node if needed.
    - **Google PaLM/AI Node:** Select your Google AI credential.

Part 4: Create Your Live Dashboards in Airtable

The n8n workflow powers your dashboards, but you need to build the visual interface in Airtable.

1. **Go to Airtable Interfaces:** In your base, click on "Interfaces" in the top left.
2. **Create a New Interface:** You can create several useful views:
    - **Vendor Status Dashboard:** A "Grid" view of the Vendor_Tasks table, grouped by Status. This shows what's in progress, complete, etc.
    - **Event Day Check-In:** A mobile-friendly "Record List" view of Vendor_Tasks for the current event, showing only the Task Name, Vendor Name, and the On-Site Check-In checkbox. Your on-site team can use their phones to check this box as vendors arrive.
    - **Finance Dashboard:** A view of Vendor_Tasks filtered where Payment Status is not Paid. Group by Payment Status to see what's pending approval vs. approved and ready to pay.

Part 5: Final Testing

Test each branch of the workflow independently before activating the whole system.

1. **Test Branch 1 (New Event):** Create a new record in your Events table with the Status set to 1. New. Run the workflow manually. It should create a list of tasks in the

Vendor_Tasks table and change the event's status to 2. In Progress.

2. **Test Branch 2 (Overdue Tasks):** In a test task, set the Deadline to yesterday and the Status to 1. Assigned. Run the workflow. You should get an email and a Slack alert.
3. **Test Branch 3 (Payment Approval):** Set a task's Status to 3. Deliverable Submitted. Run the workflow. The finance Slack channel should get a notification, and the task's Payment Status should update.
4. **Test Branch 5 (Reporting):** Set an event's Event End Date to yesterday. Run the workflow. Management should receive the post-event report email.

After testing, activate the workflow using the toggle in the top right. Your event operations are now automated!