

User Setup Guide: Replace Credentials in Your Certificate Automation

This guide will help you replace the existing credentials with your own to use the pre-built certificate automation system. Follow each step carefully.

What You're Getting

A complete automation system that:

- Monitors your Google Sheet for new student entries
- Automatically generates personalized certificates
- Saves certificates to your Google Drive
- **All credentials need to be replaced with yours**

Step 1: Replace Google Account Connections

For Google Sheets and Google Drive Access:

1. **Open the Make.com scenario you received**
 - Log into your Make.com account
 - Import/open the scenario file provided
2. **Replace Google Sheets Connection:**
 - Click on the **"Google Sheets - Watch New Rows"** module
 - In the **Connection** field, click the dropdown
 - Click **"Add"** or **"Create a connection"**
 - Sign in with **YOUR Google account**
 - Allow all permissions when prompted
 - Select this new connection
3. **Update Sheet Details:**
 - **Spreadsheet ID:** Enter the name of YOUR Google Sheet
 - **Sheet Name:** Update to your sheet's tab name (usually "Sheet1")
 - Keep other settings as they are
 - Click **"OK"** to save
4. **Replace Google Drive Connection:**
 - Click on the **"Google Drive - Upload a File"** module
 - In the **Connection** field, select the same Google connection you just created
 - **Folder:** Choose YOUR destination folder in Google Drive
 - **File Name:** Keep as is (uses dynamic naming)
 - Click **"OK"** to save

Step 2: Replace CraftMyPDF Credentials

Get Your Own CraftMyPDF Account:

1. **Sign up for CraftMyPDF:**
 - Go to: <https://app.craftmypdf.com/dashboard/>
 - Create an account with YOUR email
 - Choose a plan (free tier available for testing)
2. **Create Your Certificate Template:**
 - Click **"Manage Templates"**
 - Click **"New Template"** → **"New Template from PDF"**
 - Upload YOUR certificate design (PDF format)
 - Add dynamic fields in the template editor:
 - Drag "Input Text" elements to blank areas
 - Set Field IDs: name, roll, branch, etc.
 - **Important:** Field IDs must match your Google Sheet column headers exactly
 - Save the template and **copy the Template ID**
3. **Get Your API Key:**
 - In CraftMyPDF dashboard, click **"API Integration"**
 - **Copy your API Key**
4. **Update Make.com with Your CraftMyPDF Details:**
 - In Make.com, click on the **"HTTP - Make a Request"** module (CraftMyPDF step)
 - **Connection:** Click "Add" → Paste YOUR CraftMyPDF API Key
 - **Body:** Find the line with `"template_id":` and replace with YOUR Template ID
 - Example:

```
{
  "template_id": "your-actual-template-id-here",
  "data": {
    "name": {{1.name}},
    "roll": {{1.roll}},
    "branch": {{1.branch}}
  }
}
```

- Click **"OK"** to save

Step 3: Set Up Your Google Sheet

Create Your Data Sheet:

1. **Create a new Google Sheet:**
 - Go to <https://sheets.google.com/>
 - Create a new blank sheet
 - Name it something like "Student Certificates"
2. **Set up column headers** (Row 1) to match your CraftMyPDF template: A1: name B1: roll C1: branch D1: course E1: date

Critical: Headers must exactly match the Field IDs in your CraftMyPDF template

3. **Add test data** (Row 2): John Doe | 12345 | Computer Science | Web Development | 2025-08-07

Step 4: Enable Google APIs (One-Time Setup)

Required for Google Sheets/Drive Integration:

1. **Go to Google Cloud Console:**
 - Visit: <https://console.cloud.google.com/>
 - Sign in with the same Google account you're using for Sheets
2. **Create a Project:**
 - Click project dropdown → "New Project"
 - Name: "Certificate Generator"
 - Click "Create"
3. **Enable APIs:**
 - Go to "APIs & Services" → "Library"
 - Search and enable **"Google Sheets API"**
 - Search and enable **"Google Drive API"**

Step 5: Test Your Setup

Run a Complete Test:

1. **In Make.com:**
 - Make sure all modules show your connections (not the previous owner's)
 - Click **"Run once"** at the bottom
2. **Check for Errors:**
 - Green checkmarks = success
 - Red X = error (click to see details)
3. **Common Issues and Fixes:**
 - **"403 Missing Authentication"**: Wrong API key in CraftMyPDF connection
 - **"Template not found"**: Wrong Template ID in the HTTP module body
 - **"Empty fields in PDF"**: Column headers don't match CraftMyPDF Field IDs
 - **"Data size: 0"**: No new rows in sheet, add test data
4. **Verify Results:**
 - Check your Google Drive folder
 - You should see: "John Doe_certificate.pdf"
 - Open the PDF to confirm it has the correct information filled in

Step 6: Go Live

Make It Fully Operational:

1. **If test was successful:**

- Toggle the scenario **ON** (switch at bottom of Make.com)
- Set schedule: Check for new rows every 15 minutes

2. **Normal Usage:**

- Add new student rows to your Google Sheet
- Certificates will generate automatically
- Files appear in your Google Drive folder

Step 7: Field Mapping Reference

Ensure Your Setup Matches:

Google Sheet Header	CraftMyPDF Field ID	Make.com Body Key
name	name	"name"
roll	roll	"roll"
branch	branch	"branch"
course	course	"course"
date	date	"date"

All three must be identical (including capitalization)

Step 8: Troubleshooting Quick Fixes

If Something Doesn't Work:

1. **Certificate fields are blank:**

- Check Field IDs in CraftMyPDF template
- Verify Google Sheet column headers match exactly
- Ensure Make.com body uses same field names

2. **"No new rows detected":**

- Right-click Google Sheets module → "Choose where to start" → "All"
- Add fresh test data to your sheet

3. **PDF not uploading to Drive:**

- Verify Google Drive connection and folder selection
- Check that HTTP module is properly configured

4. **API errors:**

- Double-check all API keys are copied correctly
- Ensure Template ID is from your account, not the previous owner's

Final Checklist

Before using regularly:

- ☐ Your Google account connected to both Sheets and Drive modules
- ☐ Your CraftMyPDF API key in the HTTP module connection
- ☐ Your Template ID in the HTTP module body
- ☐ Your certificate template has correct Field IDs
- ☐ Your Google Sheet headers match the Field IDs exactly
- ☐ Test run produces correct certificate in your Drive folder
- ☐ Scenario is toggled ON in Make.com

Security Note

Important: The previous owner's credentials are completely removed. All certificates will now:

- Use YOUR CraftMyPDF account (and billing)
- Save to YOUR Google Drive
- Use YOUR Google Sheet data
- Be completely private to your account

Support

If you encounter issues:

1. Double-check each credential replacement step
2. Verify all field names match exactly across all platforms
3. Test with simple data first
4. Ensure all APIs are enabled in Google Cloud Console

Your automation is now personalized and ready to use!