



Air4media Pilot v10 BETA
Select Company OWNER
All Sites
Laurent P Grout

- Dashboard
- Documentation
- CLIENTS
- BILLING
- MARKETING
- MEDIA
- WEBSITE
- AI
- SETTINGS
- Company Settings
- Email Templates
- Business Setup
- Email Management
- Booking Settings
- Resources
- Automations
- Integrations
- Webhooks
- Reports
- Billing
- Tools
- PLATFORM
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QuickBooks Online  
Not Connected

Twilio SMS  
Not Connected

Stripe Payments  
Not Connected

Google Calendar  
Not Connected

Zoom  
Not Connected

Google Workspace  
Not Connected

Webhooks  
Not Connected

Client Portal
QuickBooks
Stripe Connect
SMS / Twilio
Google Calendar
Zoom
Workspace

0  
Portal Accounts

0  
Portal Users

0  
Recent Logins (30d)

0  
Unread Messages

Portal-Enabled Accounts Search accounts...

Account	Type	Portal Users	Theme	Status	Actions
(206) 369-2757	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
329 events	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
360 Destination Group	client	0 / 2	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
360 DG	client	0 / 3	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
A Touch of Light Weddings & Events	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Aaron Nelson (Personal)	client	0 / 2	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Access	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Access DMC	client	0 / 12	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Access PDMC	client	0 / 0	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Access XP LLC	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Adli Soto (Personal)	prospect	0 / 2	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Adrianne Curran (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Adrienne Butler (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Adrienne Pacheco (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
AEG Presents	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Agape Planning & Design	client	0 / 2	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Aileen Vasquez (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Akansha Mirchandani (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alana Wetenhall (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alejandra Gonzalez (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alex Williams (Personal)	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alexis Tirado (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alfie Pettit (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
All Lytle (Personal)	client	0 / 2	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alicia Gregory (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alison Ferenczy (Personal)	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Allie Frost (Personal)	client	0 / 2	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Allison Specter (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alma Torres (Personal)	client	0 / 2	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Alyssa Gaeto (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amanda Lee (Personal)	prospect	0 / 2	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amanda Minchella (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amanda Vance (Personal)	client	0 / 0	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amando (Personal)	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amber Molina (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amber Nuñez (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amber Wong (Personal)	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amy Hauldren (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Amy Parmar (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Andrew Matson (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Angela Harebottle (Personal)	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Angelika Palomer (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Ann Friday (Personal)	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Ann Sheffer (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Anna Abbatiello (Personal)	prospect	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Anna Lukes (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Annie Wasserman (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Annika Gandarilla (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Anson Avellar (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>
Antone Murray (Personal)	client	0 / 1	default	Disabled	<span>✓</span> <span>✗</span> <span>🗑️</span>

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# Integrations

Connect your account with external services — payments, calendars, video calls, messaging, and more — all managed from one place.

## Key Features

- **Integration Overview:** Cards at the top show connection status at a glance — green border means active, grey means not connected
- **Stripe Connect:** Accept online payments on your invoices by connecting your Stripe account
- **Client Portal:** Give clients a secure login to view projects, invoices, contracts, and send you messages
- **QuickBooks Sync:** Push invoices and customer records to QuickBooks Online automatically
- **Google Calendar:** Two-way appointment sync with Google Calendar; Google Meet links are auto-generated
- **Zoom:** Auto-create Zoom meeting links when you book appointments with "Zoom" as the location type
- **Google Workspace:** Create and manage team email accounts on your domain via Google Workspace Admin
- **SMS / Twilio:** Send text messages to contacts using built-in templates
- **Webhooks:** Trigger actions in other tools when events happen in your CRM

## How to Use

### Stripe Connect

1. Click the **Stripe Connect** tab and choose **Connect Existing Account** or **Create New Account**
2. Complete setup through Stripe's secure OAuth flow — your credentials are never stored here
3. Once connected, view your business name, charges status, and payout status
4. Click **Stripe Dashboard** to review payments, or **Disconnect** to unlink the account

### Client Portal

1. Click the **Client Portal** tab and click the green check button next to an account to enable access
2. Click the **Users** icon to manage which contacts at that account can log in

3. Toggle access for a contact, set their password, and copy the portal link using the **Link** icon
4. Use the **Key** icon to generate a new random password for any contact at any time

## QuickBooks

1. Click the **QuickBooks** tab — configure API credentials in Settings first, then click **Connect QuickBooks**
2. Once connected, view synced accounts, pending items, failed records, and last sync time
3. Click **Sync All Invoices** to queue all unsynced invoices in one step

## Google Calendar

1. Click the **Google Calendar** tab and click **Connect Google Calendar**
2. Sign in with your Google account — only Calendar read/write access is requested
3. Appointments sync both ways between your CRM and Google Calendar automatically
4. Choose "Google Meet" as the appointment location to auto-generate a Meet link
5. Click **Sync Now** at any time to force an immediate sync

## Zoom

1. Click the **Zoom** tab and click **Connect Zoom**
2. Authorize access through Zoom's secure login — only meeting creation access is requested
3. Once connected, selecting "Zoom" as the appointment location type auto-creates a meeting link

## Google Workspace

1. Click the **Workspace** tab and click **Connect Google Workspace** (requires super admin access)
2. Once connected, click **Create User** to provision a new email account on your domain
3. View all team members and their status, and click **View Groups** to manage distribution groups

## SMS / Twilio

1. Click the **SMS / Twilio** tab and enter a phone number in international format (e.g. +12125551234)
2. Optionally select a template — appointment reminders, invoice reminders, follow-ups, and more
3. Edit the message text and click **Send SMS** — view message history below the form

## Webhooks

Click **Go to Webhooks Manager** to create and manage inbound and outbound webhooks. Outbound webhooks fire automatically when events like lead created, quote accepted, invoice paid, or appointment booked occur.

## Tips

- Stripe Connect uses Stripe's OAuth — your login credentials are never stored here
- If Stripe shows "Setup Incomplete," click the card or tab and follow the prompt to finish verification
- Google Calendar sync is continuous; use **Sync Now** to force an immediate update
- Portal access can be toggled per account at any time — clients lose or gain access immediately
- QuickBooks sync runs in the background, so large batches won't slow you down
- Webhooks connect your CRM with tools like Zapier, Make, Slack, or any service that accepts HTTP requests