

Connect your apps

Let your team read your inbox, your shop or your members, so drafts come with the real details filled in. Optional, and you choose what they can see.



TIME

5 minutes per app

FOR

Everyone

VERSION

v1.0

Connect your apps

01 Before you connect

Connecting apps is optional. Your team works without them, but with them it can look things up itself instead of asking you.

02 Connect an app

The steps are the same for every app. The card does the explaining.

03 Your mailbox

The one connection almost everyone should make. Nina (and your kit's care person) reads new mail and leaves replies as **drafts in your own mailbox**. You read and press send.

04 Your shop or members

05 All apps you can connect

06 Disconnect or change access

Open **Settings** → **Connections**, find the card and click **Disconnect**. The key is removed from your computer. Drafts the team already made stay in your folder and mailbox; nothing is deleted on the other side.

■ BEFORE YOU START

- ☐ Locally installed and activated (guide 01)
- ☐ The login for the app you want to connect

Before you connect

Connecting apps is optional. Your team works without them, but with them it can look things up itself instead of asking you.

Read, then draft

Most connections are read-only. Where the team writes, it only creates drafts.

Stays on your computer

Keys and passwords are stored encrypted on your own machine. Your agents never see them.

Switch off any time

Disconnect from the same card in Settings. Nothing else changes.

NOTE

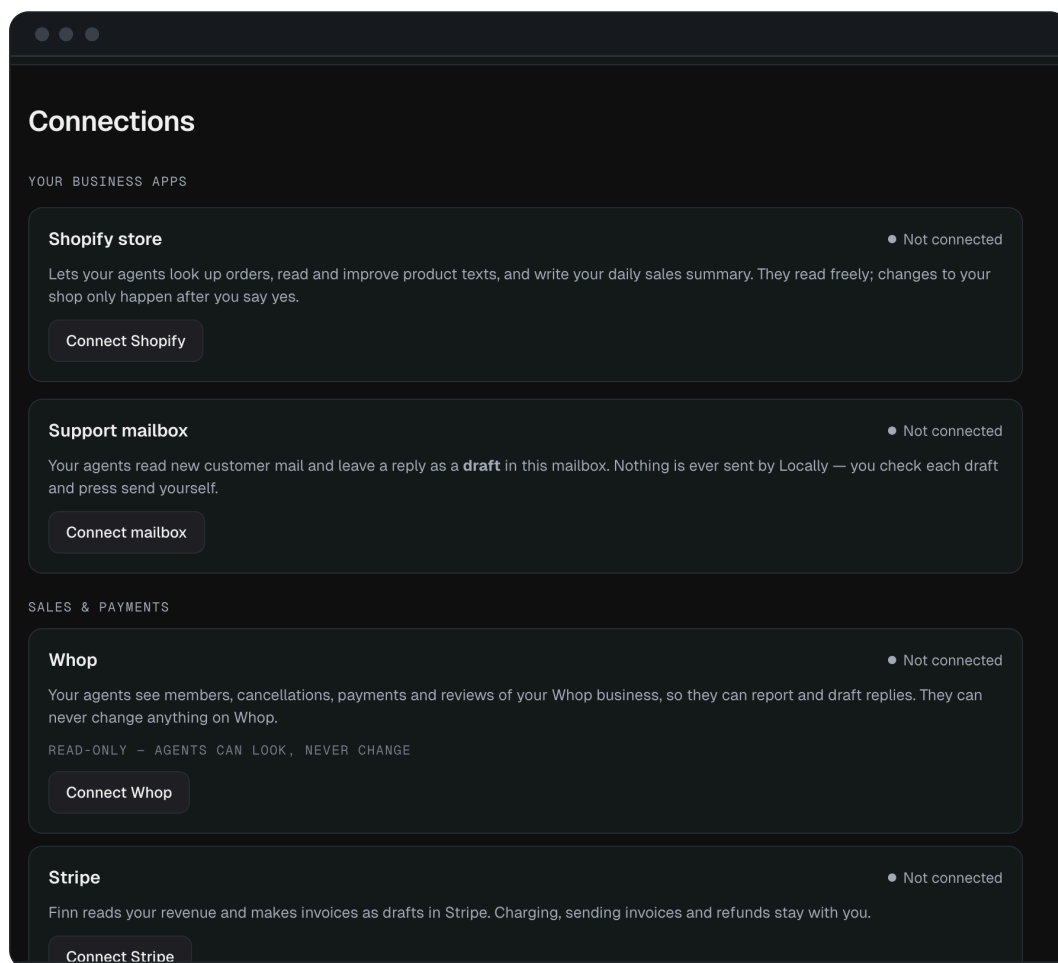
Every card tells you exactly what the team does with that app and which permissions to give. Give only those.

Connect an app

The steps are the same for every app. The card does the explaining.

1 Open Connections

Click **Settings** in the left sidebar, then **Connections**. The cards are grouped: your business apps, sales and payments, community, invoices, email and newsletter, website, ads, calendar and notes.



Each card says what the team does with the app and whether it is read-only.

2 Follow the numbered steps on the card

Click **Connect** on a card. It unfolds with numbered steps that tell you where to click in the other app and which key to copy. Name the key "Locally" in the other app so you recognise it later.

3

Paste and connect

Paste the key or password into the field and click **Connect**. The card now says **Connected**.

4

Test it

Ask the team something that needs the app, for example "Nina, what came in from customers today?" or "Dana, give me yesterday's sales in five lines."

WATCH OUT

Many apps show a key only once. If you lose it, make a new one in the other app and paste it again.

03

Your mailbox

The one connection almost everyone should make. Nina (and your kit's care person) reads new mail and leaves replies as **drafts in your own mailbox**. You read and press send.

1

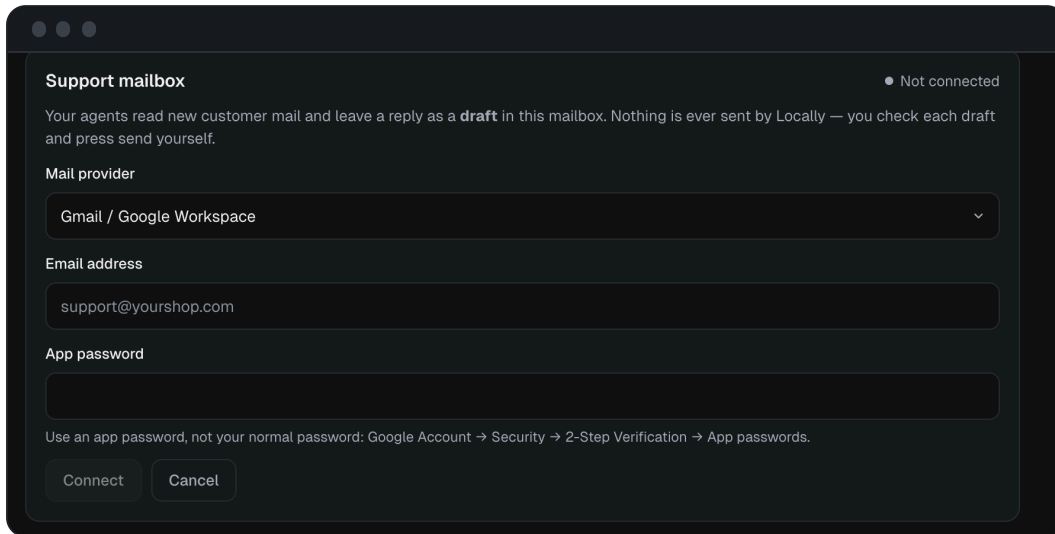
Make an app password

Use an **app password**, not your normal password. For Gmail: Google Account → **Security** → **2-Step Verification** → **App passwords**. iCloud, Yahoo and Fastmail have the same thing under their security settings.

2

Connect the mailbox

On the **Support mailbox** card click **Connect mailbox**. Pick your provider, type your email address and the app password, click **Connect**.

A dark-themed window titled "Support mailbox" with a status indicator "Not connected". The window contains instructions: "Your agents read new customer mail and leave a reply as a **draft** in this mailbox. Nothing is ever sent by Locally — you check each draft and press send yourself." Below this are three input fields: "Mail provider" (a dropdown menu showing "Gmail / Google Workspace"), "Email address" (containing "support@yourshop.com"), and "App password" (empty). A note below the password field reads: "Use an app password, not your normal password: Google Account → Security → 2-Step Verification → App passwords." At the bottom are "Connect" and "Cancel" buttons.

Gmail, Google Workspace, iCloud, Yahoo, Fastmail or your own web host.

NOTE

Outlook.com and Microsoft 365 are not supported yet. Forward your support mail to a Gmail address and connect that one.

04

Your shop or members

Shopify

On the **Shopify store** card the steps walk you through the Shopify Dev Dashboard: create an app named "Locally", give it read orders, read products, write products and read customers, release it, install it on your store, then copy the Client ID and Client secret. The shop address looks like `my-shop.myshopify.com`.

Shopify store ● Not connected

Lets your agents look up orders, read and improve product texts, and write your daily sales summary. They read freely; changes to your shop only happen after you say yes.

1. Open the [Shopify Dev Dashboard](#) and create an app (name it "Locally").
2. Under **Versions**, give it these permissions: `read_orders`, `read_products`, `write_products`, `read_customers`. Release the version.
3. Install the app on your store.
4. Under **Settings**, copy the Client ID and Client secret into the fields below.

Shop address

Client ID

Client secret

Stored encrypted on this computer only. Your agents never see it.

The four permissions let the team look up orders and improve product texts. Changes to your shop still wait for you.

Whop

Read-only. Make an **Account API key** in your Whop dashboard under Developer, tick only read permissions, and paste it. The team then sees members, cancellations, payments and reviews, and can never change anything on Whop.

SALES & PAYMENTS

Whop ● Not connected

Your agents see members, cancellations, payments and reviews of your Whop business, so they can report and draft replies. They can never change anything on Whop.

READ-ONLY – AGENTS CAN LOOK, NEVER CHANGE

1. Open your Whop dashboard → Developer (whop.com/dashboard/developer) → Account API Keys → Create. Name it "Locally".
2. Do not pick the Admin role. Choose custom permissions and tick only read permissions: members (basic + email), payments, plans, products (access passes), promo codes, forums, chat and company balance.
3. Copy the key and paste it below.

Company API key

Read-only: agents can look, never change.

All apps you can connect

APP	WHAT YOUR TEAM DOES WITH IT
Support mailbox	Reads new mail, leaves replies as drafts in your mailbox
Shopify store	Looks up orders, drafts product texts, daily sales summary
Whop	Members, cancellations, payments and reviews (read-only)
Stripe	Finn reads revenue and makes invoices as drafts
Discord server	Spots unanswered questions (read-only)
Moneybird	Quotes and invoices as drafts, watches unpaid invoices
MailerLite, Brevo, Klaviyo, Kit	Newsletters and campaigns as drafts
WordPress site	Pages and posts as drafts; you publish
Netlify	Leo's website as a preview; you publish
Facebook & Instagram ads	Max reads results and prepares campaigns switched off
Calendly	Sees booked calls to prepare you (read-only)
Notion	Plans and client pages in the pages you share

TIP

Connect only what you use. Start with your mailbox and the one app your money runs through.

Disconnect or change access

Open **Settings** → **Connections**, find the card and click **Disconnect**. The key is removed from your computer. Drafts the team already made stay in your folder and mailbox; nothing is deleted on the other side.

Stuck? We help.

Send us a message with a screenshot of what you see. A real person answers.

SUPPORT

Whop chat: whop.com/locallyai · Email: info@locallyai.nl

WEBSITE

locallyai.whop.site

WHOP

whop.com/locallyai

LINKEDIN

linkedin.com/company/locallyaiorg

INSTAGRAM

instagram.com/locallyai.app

COMPANY

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