FORRESTING THE SOUL · FREE RESOURCE

Connecting Your Tools to Your New Assistant

A plain-language guide for anyone who has an agent set up and now needs it to actually reach their email, calendar, and files.

You signed up with Tyler for a personal assistant. This is the free path to connecting it to the rest of your tools, written so nobody has to guess. The first connection takes about twenty minutes. Each one after takes less.

What this is not: hands-on setup, troubleshooting, or building workflows for you. That is the work I do for clients, and I say where that lives at the end.

Before you connect anything

- Use the same account you actually want the assistant working inside. Connecting the wrong Google account is the most common mistake.
- Sit at a computer with a browser. Phones work, but the screens are harder to read.
- Never paste a password into a chat with your assistant. Not for any tool, not ever. What you use instead is explained on the back of this sheet.
- Your assistant should have sent setup notes. If it did not, just ask it in plain words: **"give me the link to connect Google."**

Google first, because it unlocks the most

Gmail, Calendar, and Drive are usually the three that make an assistant feel useful on day one.

1. Ask your assistant to connect Google. It replies with a link it generated, not something you find by searching.
2. Open the link and sign in with the account you want it to use.
3. You will likely see a screen saying Google has not verified this app. That is normal for a personal assistant built by a small shop. Click **Advanced**, then **Go to (app name)**, then allow the permissions.
4. Approve Gmail, Calendar, and Drive. Read-only is enough for most people, and it is what I recommend first.
5. Test it immediately. Ask for the subject lines of your last three emails and the time of your next appointment. If those come back correctly, you are done.

> **If it keeps asking you to sign in again:** the app is still in Google's testing mode, and Google expires those approvals every seven days. It is not your assistant being broken. Whoever set the app up has to publish it to production, and Google requires a public privacy policy page on your website before it will allow that. Once it is published, you approve one more time and it stops asking.

What "connecting over API" actually means

An API is a door with its own key. You are not handing over your password. You issue a key that does one specific job, for one specific tool, and can be cancelled whenever you like. That is why the same instructions mostly work everywhere: you either approve a sign-in, or you copy a key from the app's settings and hand it to your assistant.

> **The one rule that matters:** a key is not a password. It is permission, it is limited, and it is revocable. Treat it that way and you are safer than most businesses.

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Which Apps, In What Order

Most connections are one of two kinds: approve a sign-in, or paste a key. Here is which is which.

APP	WHAT IT NEEDS	NOTES
Google Workspace Gmail, Calendar, Drive, Docs, Sheets	Approve a sign-in	Start read-only. Do this one first.
Microsoft 365 / Outlook	Approve a sign-in	Same idea as Google, different account.
Slack, Zoom	Install to your workspace	Approve once for the whole team.
Notion, Airtable	Integration or API key	Then share only the pages or bases it needs.
Stripe, Square, Shopify	API key	Read-only first. Money tools deserve restraint.
MailerLite, Mailchimp	API key	Found in account settings.
WordPress	Application password	Not your login password. Generated for one app, revoked on its own.
Meta, Instagram, Spotify	Approve a sign-in	Some require a review step and take longer.

The order I would do them in

1. **Google**: email, calendar, files.
2. **Your website**, so the assistant can read and update pages.
3. **Your email marketing**, so it can see what you send.
4. **Your payments, read-only**, so it can answer "how did last month go."
5. **Everything else** as you need it, not before.

Three rules that keep you safe

- **Read-only first.** Add permission to write only after you have seen what it does with reading.
- **One key per app.** Sharing one password everywhere means one leak exposes everything.
- **Know the off switch.** For Google that is myaccount.google.com/connections. Any tool can be revoked in two clicks.

When it goes wrong, in the order it usually goes wrong

- **It cannot see the right account.** You approved a different Google login than the one you use. Revoke it and connect again with the right one.
- **It asks again every week.** The app is still in testing mode. See the note on the front of this sheet.
- **It says access denied.** The key was copied with a missing character, or it was revoked. Generate a fresh one.
- **It connects but does nothing.** The account is connected and the permissions were declined. Check the app's own settings page, not just Google.

Where free ends, and paid begins

This guide is the whole free path, and I would rather give it to you than have you guessing. What it does not include is sitting beside you while you do it, diagnosing a connection that will not hold, or building the workflows behind it.

If you get stuck on one step, send me the step number and the exact error text and I will point you at the fix, once, at no charge. If it becomes more than that, or you want the connections done and documented, that is what I do for clients: Systems Coaching.

If the assistant itself needs building or fixing, that is Tyler at Ampersand. Questions about this guide: forrestingthesoul.com/contact