CUSTOMER ENABLEMENT / SELF-SERVICE FIELD GUIDE

AOS CRM Self-Service Setup and Help Desk

From invitation to a working inbox, sales pipeline, and order-platform connection - without a live onboarding call.

VERSION	1.0	**AUDIENCE**	Real-estate media owners and teams
LOGIN	app.aoscrm.com	**LINKS CHECKED**	August 4, 2026
READING MODES	60-minute launch path + reference desk	**SYSTEM**	AOS CRM / HighLevel / LeadConnector

> **THE OPERATING RULE:** AOS CRM manages people, conversations, sales follow-up, and relationship status. Aryeo, HDPhotoHub, Tonomo, or Spiro manages orders, appointments, invoices, media, and delivery. Connect the systems; do not rebuild the order system inside AOS CRM.

How to use this guide

- Work through Modules 0-9 in order; Module 10 is the troubleshooting desk.
- Use the completion checks after every module before moving on.
- Follow Official resources when a menu has changed; Community videos are supplemental.
- Never use a real prospect for the first workflow or integration test.

START HERE Open AOS CRM

Help desk map

Use the links below to jump to a module in Word. The 60-minute path is Modules 0-6 plus the proof in Module 9; integrations are completed separately.

Navigation note: The website edition adds search, saved progress, and direct section links. The printable edition preserves the same instructions and resources.

0. Start here: your 60-minute launch path

What you will finish

- Sign in and confirm your user profile, time zone, and notifications.
- Connect one Gmail or Microsoft Outlook mailbox to the Conversations inbox.
- Create or confirm a sales pipeline designed for a real-estate media business.
- Add a test contact and a test opportunity.
- Connect a working calendar if your team books sales calls through AOS CRM.
- Run a complete send, reply, and pipeline-movement test.
- Choose the correct connection path for Aryeo, HDPhotoHub, Tonomo, or Spiro.

What you need before you begin

- Your AOS CRM invitation and the exact email address it was sent to.
- The username and password for the Gmail/Google Workspace or Outlook/Microsoft 365 inbox you want to connect.
- Permission from your email administrator to authorize third-party applications. If your company blocks this, your Microsoft 365 or Google Workspace administrator must approve **LeadConnector**.
- A simple list of your sales stages, or permission to use the recommended stages in Module 4.
- Optional: administrator access to your order platform and a Zapier account for the integration module.

The 60-minute sequence

1. **Access and profile - 5 minutes.** Complete Module 1.
2. **Personal inbox - 10 minutes.** Complete Module 2 and send a test.
3. **One clean test contact - 5 minutes.** Complete the test portion of Module 3.
4. **Sales pipeline - 15 minutes.** Complete Module 4.
5. **Inbox and notifications - 10 minutes.** Complete Modules 5 and 6.
6. **Proof test - 15 minutes.** Complete Module 9.

The order-platform integration usually needs another 30-60 minutes. HDPhotoHub may require vendor assistance before its API or webhook is available. DNS changes for automated email can take up to 24-48 hours and are not part of the 60-minute path.

Stop signs

Do not continue if any of these is true:

- You are signed into the wrong business location.
- You are about to upload a full contact database before testing five records.
- A workflow is about to email or text real customers during testing.
- You are asked to paste an email password, payment card number, or private API token into a contact note.
- You cannot explain which system owns an order or customer field.

Launch check

☐ I can sign in at app.aoscrm.com.

☐ The business name shown in the location switcher is mine.

☐ I have a mailbox login and can approve LeadConnector access.

☐ I know whether I use Aryeo, HDPhotoHub, Tonomo, Spiro, or none of them.

1. Sign in, secure access, and set your profile

Sign in for the first time

1. Open the invitation sent to the exact owner or user email provided during setup.
2. Use the invitation link to create your own password. AOS staff should never create or store your password.
3. Go to app.aoscrm.com and sign in.
4. If you see more than one business, use the location switcher in the upper-left area and select the correct business.
5. Open **Settings > My Profile**. Confirm your name, email, mobile number, and time zone.
6. Save any changes, sign out, and sign in one more time to prove the password works.

Turn on useful notifications

Inside **Settings > My Profile > Notifications**, enable at least:

- A new conversation is assigned to me.
- A new message arrives in a conversation assigned to me.
- A task is assigned to me.

- An appointment is booked, canceled, or rescheduled when that option is available.

Avoid enabling every account-wide notification for every user. Owners may want account-wide visibility; sales representatives usually need only assigned conversations, tasks, and appointments.

Add the mobile app

Search the Apple App Store or Google Play for **LeadConnector**. Sign in with the same AOS CRM credentials. Allow notifications only after confirming the correct business location. The white-label desktop login remains app.aoscrm.com.

If the invitation is missing

1. Check Spam, Junk, Promotions, and any company quarantine portal.
2. Search the mailbox for **AOS CRM**, **HighLevel**, and **LeadConnector**.
3. Confirm the email spelling with the person who created the account.
4. Ask for one resend through your existing AOS support channel.
5. Do not ask anyone to send you a password. Use the invitation or password-reset flow.

Success check

- ☐ I can sign in twice without using another person's account.
- ☐ The selected business location is correct.
- ☐ My name, mobile number, and time zone are correct.
- ☐ I receive a mobile or email notification when a test conversation is assigned to me.

2. Connect Gmail or Outlook to the Conversations inbox

First understand the two email systems

Personal two-way inbox sync is for individual sales and customer emails. It connects a user's Gmail or Outlook mailbox and shows eligible threads in **Conversations**.

Automated/bulk sending infrastructure is for workflows, campaigns, broadcasts, invoices, and calendar notifications. It uses the sub-account's email service and usually a verified sending subdomain. Connecting a personal inbox does not automatically configure bulk email deliverability.

Complete personal inbox sync now. Configure a dedicated sending domain only if you will use automations or campaigns and you control DNS.

Connect Gmail or Google Workspace

1. Sign in as the AOS CRM user whose mailbox will be connected.
2. Open **Settings > My Profile**.
3. Find **Email (2-way sync)**.
4. Select **Gmail** and choose **Connect**.
5. Sign in to the correct Google account. Read the permissions, approve LeadConnector, and return to AOS CRM.
6. Confirm the email address and connection status shown in the profile.
7. Open **Conversations**, choose the compose/new-message control, select **Direct Message**, and choose a test contact.
8. Confirm your connected address appears in the **From** field. Send a plain-text test to an address you control.
9. Reply from the receiving mailbox. Confirm the reply appears in the same AOS CRM conversation.

Google's current two-way sync supports attachments up to 25 MB. When an existing CRM contact emails the connected mailbox, the eligible thread can sync into AOS CRM. Use the profile's Auto BCC address when you intentionally need to log a new outbound Gmail conversation that is not yet associated with a contact.

Connect Microsoft Outlook or Microsoft 365

1. Sign in as the AOS CRM user whose mailbox will be connected.
2. Open **Settings > My Profile**.
3. Find **Email (2-way sync)**.
4. Select **Outlook** and choose **Connect**.
5. Sign in to the correct Microsoft account and approve the LeadConnector permissions.
6. If Microsoft says administrator approval is required, stop and ask your Microsoft 365 administrator to approve the application. Repeated sign-in attempts will not bypass an organization policy.
7. Confirm the email address and connection status shown in the profile.
8. Send and reply to a test message through **Conversations**.

The documented attachment limit for Outlook two-way sync is 3 MB. Larger attachments may prevent the message from syncing even when the email exists in Outlook.

What should and should not sync

- A one-to-one email started in AOS CRM should appear in the connected mailbox's Sent folder and continue syncing as the recipient replies.
- An email from an existing CRM contact to the connected mailbox should appear in Conversations when it meets HighLevel's sync rules.
- Emails only between people who are AOS CRM system users are intentionally excluded from Gmail sync to reduce exposure of internal mail.
- Workflow and automation emails use the location-level provider; they are not personal two-way inbox messages.
- A connected mailbox is user-specific. Each teammate connects their own mailbox from their own profile.

Privacy rule

Only connect a business mailbox whose customer conversations are appropriate for authorized AOS CRM users to see. Do not connect a personal mailbox containing unrelated private, medical, financial, or employment correspondence.

If mail does not sync

1. Confirm the contact's primary email in AOS CRM exactly matches the sender or recipient.
2. Confirm the connected address is still shown under **Email (2-way sync)**.
3. Start a fresh thread with a test contact; old threads created before connection may behave differently.
4. Check attachment size: up to 25 MB for Gmail and 3 MB for Outlook according to the current vendor documentation.
5. Confirm the message was one-to-one and not a workflow or campaign email.
6. Disconnect and reconnect only after recording the error and checking your email administrator's security policy.

Official training

- Official: Connect a personal inbox
- Official: Gmail two-way email sync
- Official: Outlook two-way email sync
- Official: Getting started with Conversations

Optional: prepare automated email correctly

If you will send campaigns or workflow emails, use a subdomain you control, such as `mail.yourdomain.com`. In AOS CRM, go to **Settings > Email Services > Dedicated Domain and IP**, follow the exact DNS records presented by the platform, and verify SPF, DKIM, and DMARC. Do not copy example DNS values from a training guide; use the values generated inside your account.

- Official: Dedicated sending domain setup
- Official: Email authentication and DNS verification
- Official: Email warm-up and deliverability practices

Success check

☐ My profile shows the correct connected Gmail or Outlook address.

☐ I can send a one-to-one message from Conversations.

☐ A reply appears in the same conversation and in my normal mailbox.

☐ I understand that workflows and campaigns use separate sending infrastructure.

3. Create clean contacts before importing a list

Contact standard

Use one contact record per person, normally one real-estate agent or brokerage contact. Store the company or brokerage separately; do not put a brokerage name in the first-name field.

Minimum fields:

- First name and last name.
- Primary business email; this is the default cross-system match key.
- Mobile or direct phone in international format when possible.
- Company/brokerage.
- Contact owner.
- Source, such as Referral, Website, Aryeo, HDPhotoHub, Tonomo, or Spiro.
- Consent/DND state that reflects the person's actual permission to receive marketing.

Create the test contact

1. Open **Contacts**.

2. Choose **Add Contact**.
3. Use an email and phone number you control.
4. Put `AOS CRM Setup Test` in a visible note or tag so the record is easy to find and remove later.
5. Assign the contact to yourself.
6. Save it and confirm there is only one matching record.

Import safely

1. Export and keep an untouched copy of the source list.
2. Remove rows without a usable name plus email or phone.
3. Normalize email casing, phone numbers, country, and state names.
4. Decide what each source column means before uploading.
5. In AOS CRM, open **Contacts > Import** and select **Contacts**.
6. Upload a five-record pilot CSV first. Map every included column deliberately.
7. Do not claim consent during import unless the source system recorded it.
8. Review the five records, duplicate behavior, tags, custom fields, and DND state.
9. Import the remainder only after the pilot passes.

The platform currently accepts contact CSV files up to 50 MB. Large files are still easier to validate in smaller batches.

Duplicate rule

Search by email before creating or importing a customer. If a vendor sends a stable customer ID, store it in an **External Customer ID** custom field. Use email as the human-readable match key and the external ID as traceability. Never create a new contact solely because the same customer placed a new order.

Useful tags and custom fields

Keep the list small and governed. A practical starting set is:

- Tags: `source:aryeo`, `source:hdphotohub`, `source:tonomo`, `source:spiro`, `customer:active`, `customer:dormant`, `setup:test`.
- Fields: Order Platform, External Customer ID, Last Order Date, Last Order Status, First Order Date, Referral Source.

Do not create a custom field when an existing standard field already fits. Do not put card data, passwords, API tokens, or full media-delivery payloads in custom fields.

Official training

- Official: Create and manage contacts
- Official: Import existing contacts

Success check

☐ My test person exists once, with the correct email, phone, owner, and source.

☐ A conversation with the test person opens the correct contact.

☐ I tested five imported records before importing a full database.

☐ Marketing consent and DND were not guessed or overwritten.

4. Build a sales CRM pipeline that your team will use

What the pipeline represents

An AOS CRM opportunity represents the relationship you are trying to win: usually an agent, brokerage, builder, or partner. It does **not** represent every photo shoot. The order platform remains the source of truth for individual jobs.

Recommended AOS sales pipeline

Create one pipeline named **New Business Sales** with these open stages:

1. **New Lead -** no two-way conversation yet.
2. **Attempting Contact -** outreach has started; the next task and date are set.
3. **Connected -** the person responded or a real conversation occurred.
4. **Qualified -** fit, service area, approximate volume, and need are known.
5. **Consult / Demo Scheduled -** a sales meeting or portfolio review is booked.
6. **Proposal / Trial Offered -** pricing, trial shoot, or next commercial step is in the customer's hands.
7. **Decision Pending -** a specific decision date and next follow-up exist.
8. **First Order Booked -** the first real order is scheduled; mark the opportunity **Won** after validation.

HighLevel creates Won and Lost outcomes automatically. Do not add open stages named Won or Lost. Use the opportunity status for the outcome. Use a lost reason such as Price, Timing, Coverage, No Response, Existing Vendor, or Not a Fit.

Create the pipeline

1. Open **Opportunities**.

2. Select **Pipelines** at the top of the page.
3. Choose **Create new pipeline**.
4. Name it **New Business Sales**.
5. Add the eight stages above, in order. Stage names must be unique inside the pipeline.
6. Save the pipeline. If stage colors are available, use one quiet progression from cool to warm; do not use color as the only signal.

Create the test opportunity

1. Return to the pipeline board and choose **Add opportunity**.
2. Select the test contact from Module 3.
3. Name the opportunity `Setup Test - [Your Name]`.
4. Select **New Business Sales > New Lead**.
5. Set status to **Open**, assign yourself, and use `0` for value unless you have a defensible estimate.
6. Add a task: `Send setup test reply`, due today.
7. Move the opportunity through each stage and confirm the activity appears on the record.
8. Mark it Won only after completing the Module 9 proof test.

Daily operating rhythm

Every open opportunity must have:

- One owner.
- One current stage.
- One next action.
- One next-action date.
- A source.

Start each workday by filtering for overdue tasks and opportunities with no activity. End the day by moving records to the stage that reflects what actually happened, not what you hope will happen.

Automate only after the manual flow works

A safe first automation is: when a qualified lead books a sales calendar, create or update one opportunity in **Consult / Demo Scheduled**, assign the correct owner, and create a preparation task. Test with a new test contact while all outbound messages are disabled.

Official and video training

- Official: Create and manage pipelines
- Official: Set up pipelines and opportunities
- Official: Create or update opportunities in workflows
- Community video: Opportunities and pipelines full tutorial (GHL Wizard, 2025)

Community videos are supplemental. They may show a different menu layout, contain promotions, or use a direct HighLevel brand instead of AOS CRM. Follow AOS naming and the current official documentation when they differ.

Success check

- ☐ New Business Sales has the eight open stages in the recommended order.
- ☐ The test opportunity has an owner, source, task, and next-action date.
- ☐ I can move the opportunity, mark it Won/Lost, and record a lost reason.
- ☐ I will not create one opportunity per photo shoot.

5. Work from Conversations without losing ownership

Triage the inbox

Use **Conversations** as the working inbox for customer communication that belongs in the CRM.

1. Select the inbox view you need: assigned to you, team, unread, or another available filter.
2. Open unread items from oldest to newest when response-time commitments matter.
3. Read the contact and opportunity context in the side panel before responding.
4. Assign the conversation to the person responsible for the next response.
5. Add an internal note for context that should not be sent to the customer.
6. Reply from the correct channel and sender.
7. Mark the conversation read and update the opportunity stage or task when the exchange changes the sales status.

Assignment rules

- One conversation has one accountable owner at a time.
- Internal comments explain a handoff; assignments establish responsibility.
- Do not leave important conversations in a shared unassigned state.

- Do not use tags as a substitute for an owner and next action.

Sender check before every email

Confirm the From address, recipient, subject, and contact record. If multiple user inboxes are connected in the same location, filter by the intended email channel and never assume the last-used sender is correct.

What belongs in a contact note

Record decisions, requirements, objections, promises, next steps, and concise call outcomes. Do not copy entire private email threads, credentials, payment data, or unrelated personal information into notes.

Official training

- [Official: Getting started with the Conversations tab]

Success check

- ☐ I can filter to conversations assigned to me.
- ☐ I can reassign a test conversation and leave an internal note.
- ☐ I check the From address before sending.
- ☐ A meaningful reply creates the correct task or pipeline update.

6. Connect your calendar and control notifications

Connect a calendar only if AOS CRM will schedule sales consultations, demos, or customer-success meetings. Your photo-platform appointment calendar remains the source of truth for photo shoots unless you intentionally build and test a separate synchronization.

Connect Google or Outlook calendar

1. Open **Settings > Calendars**.
2. Select **Connections** and choose **Add New**.
3. Select Google or Outlook, sign in to the correct account, and approve access.
4. Choose the linked calendar that should receive AOS CRM bookings.
5. Choose conflict calendars whose events should block availability.
6. Confirm your profile time zone and the calendar time zone match.

7. Create a private test booking, confirm it appears on both calendars, reschedule it, and then cancel it.

Calendar connection terms:

- **Connected calendar** authorizes access to an external account.
- **Linked calendar** receives AOS CRM appointments and may sync events depending on configuration.
- **Conflict calendar** blocks availability when an external event already exists.

Microsoft Outlook must be cloud-based. Events stored only in an on-premise Exchange server or a local Outlook desktop file cannot sync through the documented cloud integration.

Separate sales meetings from photo shoots

Do not send every Aryeo, HDPhotoHub, Tonomo, or Spiro photo appointment into an AOS sales calendar by default. This can create duplicate events, incorrect availability, and customer workflows triggered by the wrong calendar. Sync only the milestones your documented use case requires.

Official training

- [Official: Set up linked and conflict calendars]()
- [Official: Connect Outlook Calendar]()

Success check

- ☐ A private test booking appears on the intended linked calendar.
- ☐ A conflict event blocks the intended AOS CRM availability.
- ☐ Reschedule and cancellation changes sync correctly.
- ☐ Photo-shoot scheduling still has one clearly defined source of truth.

7. Add one safe workflow for follow-up

Workflows are powerful and can contact many people. Build the first workflow with outbound email and SMS actions disabled until the record-management actions pass.

Recommended first workflow

Name: `Sales - Consultation Booked - Create Opportunity and Task`

1. Open **Automation > Workflows**.
2. Choose **Create Workflow > Start from Scratch**.

3. Add the trigger **Customer Booked Appointment** and select only the AOS sales consultation calendar.
4. Add **Create/Update Opportunity** and select **New Business Sales > Consult / Demo Scheduled**.
5. Disable duplicate opportunities for this first-customer sales use case, or configure the action to update the existing contact opportunity.
6. Add **Assign to User** if ownership is known.
7. Add **Create Task**: `Prepare for consultation`, due before the appointment.
8. Save in Draft.
9. Run a live booking with a brand-new test contact; workflow test mode may not reproduce every trigger condition.
10. Confirm one contact, one opportunity, and one task are created. Fix any duplicate behavior before publishing.
11. Publish only after the record actions pass. Add confirmations or reminders later as a separate tested change.

Safety checklist before publishing any message workflow

- ☐ Trigger filters select the intended form, calendar, tag, or event.
- ☐ Re-entry is intentionally on or off.
- ☐ The sender address and sending domain are verified.
- ☐ Business hours and time zone are correct.
- ☐ Unsubscribed/DND contacts are suppressed.
- ☐ A test contact completed the entire path.
- ☐ One person owns failures and reviews workflow history.

Official training

- Official: Getting started with workflows
- Official: Create opportunity workflow action

Success check

- ☐ A test booking creates or updates exactly one opportunity.
- ☐ The correct owner, stage, and task are applied.
- ☐ No customer-facing message was enabled before the record actions passed.

8. Connect Aryeo, HDPhotoHub, Tonomo, or Spiro

Choose one source of truth

Use this boundary for every integration:

Information	Source of truth
Person, email, phone, brokerage, sales owner	AOS CRM after synchronization
Conversation history and sales follow-up	AOS CRM
Sales opportunity and relationship stage	AOS CRM
Order, shoot appointment, invoice, payment, media, delivery	Aryeo, HDPhotoHub, Tonomo, or Spiro
Integration run history and errors	Zapier or the integration service

Start with a one-way flow from the order platform into AOS CRM. Do not enable two-way updates until field ownership, duplicate rules, error recovery, and test results are documented.

Standard AOS field map

Map only what the sales team will use:

Vendor data	AOS CRM destination	Rule
Customer first/last name	Contact first/last name	Never place company in the first-name field.
Customer email	Contact primary email	Primary find-or-create key. Skip or quarantine blank email.
Customer phone	Contact phone	Normalize country code where possible.
Brokerage/company	Company field	Keep separate from person name.
Vendor customer ID	External Customer ID	Traceability; do not display as the contact name.
Vendor name	Order Platform + source tag	One of Aryeo, HDPhotoHub, Tonomo, Spiro.
First order created/scheduled	First Order Date	Set once.
Latest order event	Last Order Date/Status	Update existing fields; do not create a new sales opportunity.
Order amount, optional	Opportunity value or custom field	Use only with an agreed rule; never sync payment credentials.

Standard event-to-sales behavior

- **New customer/client:** find by email, update or create the contact, record platform and external ID, and create an open opportunity only if no customer-acquisition opportunity exists.
- **Order created or scheduled:** set First Order Date if blank, set customer active, move the existing opportunity to **First Order Booked**, then verify before marking it Won.
- **Order paid:** update Last Order Status. Do not create another sales opportunity.
- **Order fulfilled/listing delivered:** update the last-order fields and optionally start a separate customer-success/review workflow. Do not move a sales opportunity backward.
- **Order canceled:** update the order-status field and create a review task. Do not automatically mark the customer relationship Lost.

Default no-code connection pattern

1. In Zapier, create or select a secure connection to **LeadConnector**. LeadConnector is the Zapier app for the platform behind AOS CRM.
2. Authorize the correct AOS CRM location. Name the connection with both business and location so it is not confused with another client.
3. Configure the vendor trigger or **Webhooks by Zapier > Catch Hook**.
4. Test with a fake customer using an email you control.
5. Add a **Find Contact** or equivalent lookup by email before any create action.
6. Add **Create or Update Contact** in LeadConnector.
7. Add source tag and custom-field updates.
8. Find the existing open opportunity before creating one. Create only when the sales relationship does not already have an opportunity.
9. Add the order-milestone update.
10. Test create, update, duplicate, cancellation, and missing-email cases.
11. Turn on the Zap and monitor every run for the first week.

- Official: LeadConnector on Zapier
- Community video: Connect HighLevel/LeadConnector to Zapier with OAuth (Dan Wardrope, 2025)

Aryeo

Recommended path: Aryeo's Zapier app to LeadConnector.

Useful Aryeo triggers currently include Customer Created/Updated, Order Created/Paid/Fulfilled, and appointment events. Start with **Customer Created** and **Order Created**. Use Order Paid or Fulfilled only to update milestone fields or start customer-success activity.

1. Create a Zap and select **Aryeo** as the trigger app.
2. Authorize the correct Aryeo account.
3. Choose **Customer Created** for the customer-sync Zap.
4. Add the LeadConnector find/update steps from the default pattern.
5. Create a second Zap for **Order Created** if you need the First Order Booked milestone.
6. Store the Aryeo customer or order ID for traceability.
7. Test with a fake Aryeo customer/order and confirm only one AOS contact and one sales opportunity exist.

Aryeo also documents APIs and signed webhooks, but custom webhook management may be feature-flagged. Use the native Zapier app for self-service unless you have an approved engineering use case.

- Official service page: Aryeo integrations on Zapier
- Official developer guide: Aryeo webhooks

HDPhotoHub

Recommended path: HDPhotoHub webhook/API to Zapier, then LeadConnector. **Vendor assistance may be required.**

HDPhotoHub publicly states that it offers APIs and webhooks, and its 2026 product updates reference an `order.add` webhook. Its public help center does not currently provide a complete self-service AOS/LeadConnector connector or a full public webhook configuration procedure. Do not invent an endpoint, authentication method, or menu path.

1. Ask HDPhotoHub support to confirm that API/webhook access is enabled for your business and plan.
2. Request the current documentation for customer and order events, authentication/signing, retries, test mode, and the `order.add` payload.
3. Create a **Webhooks by Zapier > Catch Hook** trigger and copy the generated HTTPS URL.
4. Configure the HDPhotoHub webhook exactly as their current support instructions require.
5. Send a test order, inspect the payload, and map only approved customer and milestone fields.
6. Add LeadConnector find/update and existing-opportunity lookup steps.
7. Test an updated order to confirm it updates rather than duplicates the contact or sales opportunity.

Use HDPhotoHub's support request form, the in-app chat, or Support@HDPhotoHub.com for the current enablement instructions.

- Official: HDPhotoHub integrations, API, and webhooks overview
- Official: HDPhotoHub help center
- Official: 2026 interface and order-webhook updates

Tonomo

Recommended path: Tonomo webhook to Webhooks by Zapier, then LeadConnector.

Tonomo's documentation says its Zapier connection uses webhooks and requires at least Tonomo's Starter plan. It can send an event when an order is created or its status changes.

1. Create a Zap with **Webhooks by Zapier > Catch Hook**.
2. Copy the webhook URL.
3. In Tonomo, place the URL in the documented booking-created or status webhook field for the event you are implementing.
4. Create a realistic test order with complete customer information; do not leave fields blank.
5. In Zapier, test the trigger until the Tonomo payload appears.
6. Add LeadConnector find/update, source tag, external ID, and milestone steps.
7. Test an order status change and confirm it updates Last Order Status without creating a new opportunity.

- Official: Tonomo Zapier/webhook setup

Spiro (spiro.media)

Recommended path: Spiro webhook to Webhooks by Zapier, then LeadConnector.

This guide means the real-estate-media platform at **spiro.media**, not the separate Spiro.ai sales CRM. Spiro supports webhooks for order, photographer, invoice, and listing events; a newer product update also documents a New Client webhook.

1. In Spiro, open **Settings > Webhooks**.
2. In Zapier, create **Webhooks by Zapier > Catch Hook** and copy the HTTPS URL.
3. In Spiro, choose the event. Start with **New Client** or **Order Created**.
4. Enter a clear name and description, paste the Zapier URL, and create the webhook.
5. Confirm Spiro shows the webhook as active. If Spiro cannot POST successfully, it may create the webhook in an inactive state.

6. Send a test event and add the standard LeadConnector find/update and opportunity controls.
7. Add separate milestone Zaps only when they create a defined sales or customer-success action. Listing Delivered, for example, should update a field or launch a review request after approval; it should not create another sales opportunity.

- Official: Spiro webhook notifications
- Official: Spiro New Client webhook update

Integration proof checklist

☐ The test event created or updated exactly one AOS contact.

☐ Running the same event again did not create a duplicate.

☐ A second order updated the existing relationship rather than creating a second sales opportunity.

☐ A missing-email record stopped in a review path instead of creating a bad contact.

☐ Cancellation and reschedule events produced the documented behavior.

☐ No card data, credentials, private media URLs, or unnecessary payload data entered AOS CRM.

☐ The Zap or webhook owner receives failure notifications.

☐ The order platform still owns orders, invoices, media, and delivery.

9. Run the launch proof and start daily use

Use a test address and phone you control. Do not use a real prospect for the first proof.

End-to-end launch proof

1. Sign in at app.aoscrm.com as yourself.
2. Open the test contact and confirm owner, email, phone, source, and DND state.
3. Send a one-to-one email from Conversations.
4. Reply from the external mailbox and confirm the same thread syncs back.
5. Create or open the test opportunity in **New Business Sales > New Lead**.
6. Add a due-today task and complete it.
7. Move the opportunity through Connected, Qualified, and Consult / Demo Scheduled.
8. Book a private test consultation. Confirm the linked calendar and notification.
9. If an order-platform integration is configured, send one fake customer/order event and inspect the Zap run plus the AOS record.
10. Confirm a repeated event does not create a duplicate.

11. Move the opportunity to First Order Booked and mark it Won.
12. Remove or clearly archive all setup-test records, calendar events, and tags according to your retention policy.

Definition of ready

The system is ready only when all are true:

- ☐ Every active user signs in with their own account.
- ☐ Each user who sends one-to-one email connected and tested their own business mailbox.
- ☐ New Business Sales exists and the team agrees on the meaning of each stage.
- ☐ A contact and opportunity can be created, assigned, moved, and found.
- ☐ Notifications reach the accountable user.
- ☐ Calendar synchronization passed create, reschedule, and cancellation tests if calendars are in use.
- ☐ The selected order-platform integration passed create, update, duplicate, and failure tests, or is explicitly marked Not Configured.
- ☐ The owner knows where to review failed workflow or Zap runs.

The 15-minute daily routine

1. Open Conversations and clear assigned unread customer messages.
2. Open Tasks and address overdue items.
3. Review New Lead and Attempting Contact for records without a next action.
4. Update stages based on actual customer behavior.
5. Check the integration task history for new failures during the first week.
6. End with every active opportunity assigned and carrying a dated next action.

10. Troubleshooting and support desk

Use this order before escalating

1. **Identify the failing layer.** Is it access, mailbox authorization, AOS record logic, Zapier, or the order platform?
2. **Reproduce with a test record.** Never use a production customer if a safe test can reproduce the problem.

3. **Record evidence.** Capture time and time zone, user, business location, contact email, event type, expected result, actual result, error text, and screenshots. Redact credentials and private customer data.
4. **Check the official article linked in the relevant module.** Interfaces change; the official article is the current authority.
5. **Escalate to the system that failed.** Vendor event missing: contact the vendor. Zap trigger/action failed: inspect Zapier. AOS record or permission wrong after a successful Zap: use the AOS support channel from your welcome email.

Login or invitation issue

Symptoms: invitation missing, link expired, password rejected, wrong business.

Check: spam/quarantine, exact invite email, location switcher, password reset, and whether a user record exists. Ask for one resend; do not create a duplicate user to solve a delivery problem.

Escalate with: business name, exact user email, invitation time, last attempted login time, and screenshot without the password.

Gmail or Outlook will not connect

Symptoms: authorization loop, administrator approval required, connection disappears.

Check: correct email account, third-party application policy, pop-up blocking, profile connection status, and whether the same mailbox is already connected to an incompatible location/user.

Escalate first to: your Google Workspace or Microsoft 365 administrator when the provider explicitly blocks LeadConnector access.

Email sent but reply is missing

Check: contact primary email, same thread, connected mailbox status, attachment size, sender address, and whether the email came from a workflow/campaign rather than personal sync. Test a fresh one-to-one thread with no attachment.

Duplicate contacts or opportunities

Immediate action: pause the affected Zap/workflow before more duplicates are created.

Check: lookup step runs before create, email normalization, external ID mapping, duplicate-contact settings, workflow re-entry, opportunity lookup, and whether one order incorrectly creates one opportunity.

Do not bulk delete until you export or otherwise preserve the records and understand which one owns conversations, appointments, and opportunity history.

Pipeline automation did not move a record

Check: workflow is published, trigger filters, event happened after publication, contact has an opportunity in the selected pipeline, action selected the correct stage, re-entry behavior, and workflow execution history. Test with a new contact.

Vendor event never reached AOS CRM

1. Confirm the customer/order event exists in the vendor platform.
2. Confirm the vendor webhook is active and points to the current Zapier URL.
3. Check the vendor's webhook history if available.
4. Check Zapier trigger history.
5. If no Zap run exists, the problem is before AOS CRM.
6. If the Zap ran and failed, inspect the exact failed step and mapped fields.
7. If every Zap step succeeded but the AOS record is wrong, inspect location selection, duplicate logic, and LeadConnector field mapping.

Severity guide

- **Urgent:** suspected unauthorized access, private data sent to the wrong contact/location, a runaway automation messaging multiple real contacts, or credentials exposed. Pause the workflow/Zap immediately and use the AOS support channel.
- **High:** all users cannot sign in, all inbox sync is down, or every vendor event fails. Collect one clean example and escalate the same business day.
- **Normal:** one record failed, one user needs reconnection, or a mapping is wrong. Preserve the run, use a test record, and follow the module checklist.
- **How-to:** use this guide and linked official training before opening a request.

Support request template

Copy this into the appropriate support channel:

Business/location: Affected user: System and feature: Date/time/time zone: Test contact email or external ID: Expected result: Actual result: Exact error text: Steps already tried: Workflow/Zap/webhook name and run ID: Screenshots or screen recording: Impact and number of records affected:

Never include passwords, authentication links, API tokens, private keys, full card numbers, or unredacted sensitive customer data.

Reference A. Curated training library

HighLevel/AOS CRM essentials

- Official HighLevel support portal
- Official HighLevel University
- Official HighLevel YouTube channel
- Official: Connect a personal inbox
- Official: Gmail two-way sync
- Official: Outlook two-way sync
- Official: Conversations
- Official: Contacts import
- Official: Pipelines
- Official: Pipelines and opportunities
- Official: Linked and conflict calendars
- Official: Workflows
- Official: Webhooks in HighLevel

Curated community videos

- Opportunities and pipelines full tutorial - GHL Wizard (2025)
- Connect HighLevel/LeadConnector to Zapier with OAuth - Dan Wardrope (2025)

These community creators are not AOS CRM support. Videos may contain affiliate promotions and may show menus that have since changed. Use them for visual orientation, then follow the official article and this guide's AOS operating rules.

Order-platform connections

- Aryeo on Zapier
- Aryeo webhook guide
- HDPhotoHub integrations/API/webhooks overview
- HDPhotoHub help center
- Tonomo Zapier/webhook guide

- [Spiro webhook guide]
- [LeadConnector on Zapier]

Reference B. Administrator maintenance guide

Quarterly review

An AOS administrator should review this help desk quarterly and after any major interface change.

1. Open every resource link, replace retired URLs, then update the **Resource links last checked** date.
2. Re-run Gmail and Outlook test connections with non-production users.
3. Confirm pipeline and Won/Lost behavior; review LeadConnector's current Zapier authentication and actions.
4. Review Aryeo, HDPhotoHub, Tonomo, and Spiro events and plan requirements; test create, update, duplicate, and failure behavior for each active integration type.
5. Rebuild and inspect the website, DOCX, and PDF.

Change control

- In the Markdown source, make one factual change at a time, tie vendor claims to current official sources, and label third-party videos as Community.
- Never publish client credentials, location IDs, workflow IDs, API tokens, or real contact data in the guide.
- Re-test any instruction that can send a message, create duplicates, alter consent, or move opportunities.
- Archive the prior release and record the guide version, date, editor, links changed, and behavior changed.

Ownership map

- **AOS administrator:** AOS permissions, snapshot configuration, pipeline standard, workflow logic, LeadConnector mapping, and help-center publication.
- **Client email administrator:** Google Workspace or Microsoft 365 authorization and DNS control.
- **Client owner:** contact consent, sales process, owners, field meaning, and acceptance testing.
- **Order-platform vendor:** vendor account, event availability, webhook/API access, and vendor payload behavior.
- **Zapier owner:** connections, Zap logic, task usage, error alerts, and run history.