Pilot Documentation

Air4 Media — March 2026

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Getting Started

Getting Started with Pilot

Pilot is a comprehensive web platform by Air4 Media for managing websites, email marketing, CRM, digital assets, and more. It provides a unified dashboard for all your online business needs.

Key features include:

- Site Builder: Create and manage websites visually with drag-and-drop editing
- Airmail: Email marketing with subscriber management, campaigns, and analytics
- CRM: Full customer relationship management with contacts, quotes, invoices, pipeline, and calendar
- AirCatalog: Product catalogs with pricing and PDF export
- AirGallery: Image galleries with sharing and embedding
- AirBlog: Blog engine with categories, comments, and RSS feeds
- AirForms: Form builder for lead capture and management
- AirChat: AI-powered chatbot for customer support
- Assets Manager: Digital asset management with cloud storage

After logging in, you land on the Dashboard which shows an overview of your activity and quick access to all features. New users go through an onboarding flow to set up their workspace.

Navigation uses a sidebar menu on the left with all available features organized by category. The top bar shows notifications and user settings.

Features & Tools

AI Agent

AI Agent

The AI Agent lets you run intelligent conversations with contacts — qualifying leads, onboarding new clients, helping prospects choose a product, or collecting feedback — all through a natural chat interface powered by AI.

Key Features

- **Five Conversation Types**: Choose the right kind of conversation for the moment — Lead Qualification, Onboarding, Decision Helper, Follow-up, or Satisfaction Survey
- **Smart Chat Interface**: Real-time back-and-forth chat where the AI asks questions naturally, one at a time, without feeling like an interrogation
- **Automatic Analysis**: After enough exchanges, the AI silently generates a full lead profile — urgency score, budget range, decision-maker status, recommended products, pricing tier, and a written summary
- **Shareable Conversation Links**: Generate a link and send it to a contact so they can continue the conversation on their own, without logging in
- **Outcome Tracking**: Each conversation is automatically tagged as Qualified, Not Qualified, Needs Nurturing, or Referred once the AI has enough information
- **Dashboard Stats**: See totals for all conversations, active ones, qualified leads, and credits used at a glance
- **Filtering**: Filter your conversation list by type, status, or outcome to focus on what matters

How to Use

1. Click **Start Conversation** to open the setup dialog
2. Select a conversation type (e.g., Lead Qualification)
3. Optionally link the conversation to a contact and/or project
4. Click **Start** — the AI opens with a personalized greeting and first question
5. Type your replies in the chat box and press Enter to send
6. Watch for the "Analysis updated" badge — this means the AI has generated insights

7. Click the chart icon in the chat header to view the full analysis panel
8. When done, click **Complete** to close the conversation and save the outcome

Sharing a Conversation

To let a contact respond on their own:

1. Open the conversation
2. Click the share icon in the chat header
3. The link is automatically copied to your clipboard
4. Send the link to your contact — they can reply without an account

Tips

- The AI generates its analysis after at least 4 exchanges — the more your contact shares, the richer the insights
- Use **Lead Qualification** for new inquiries, **Decision Helper** when a prospect is comparing options, and **Satisfaction** after an event wraps up
- Filter by "Qualified" outcome to find your hottest leads quickly
- Credits are consumed per AI message — check the Credits counter in the stats bar to track usage

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Accounts

Accounts

Manage the users who have access to your DAM site — view their profiles, control their download permissions, and approve pending registrations.

Key Features

- **User List**: See all registered users for the selected DAM site, including their name, company, email, country, and last active date.
- **Access Levels**: Each user is assigned one of six access levels that control what they can do on the DAM site — from Guest (no access) to Admin (full control).

- **Filter by Level**: Instantly filter the list to see only Pending approvals, users with Web Download, Full Download, or any other level.
- **Search**: Find users by username, first name, last name, company, email, city, or country.
- **Approve Pending Users**: Users who register on your DAM site start as Pending. Approve them with one click to grant Web Download access.
- **Account Detail**: Click any user to view their full profile — name, contact info, company, access level, and account type.

Access Levels

Level	What the user can do
Guest	No access
Pending	Registered but not yet approved
No Download	Can browse but not download
Web Download	Can download web-resolution files
Full Download	Can download full-resolution files
Admin	Full access to the DAM site

How to Use

Select a DAM Site

Accounts are scoped to a specific DAM site. Select your site from the topbar before the list will appear.

Approve a Pending User

1. Use the **Access Level** filter and select **Pending** to see users waiting for approval.
2. Click the **Approve** button on their row.
3. They are automatically granted Web Download access.

View a User's Profile

1. Click the **View** button (eye icon) on any row.
2. A panel shows their username, full name, company, email, phone, city, country, access level, and account type.

Search and Filter

- Type in the search bar to find users by name, company, email, city, or country.
- Use the **Access Level** dropdown to filter by a specific permission level.
- Click any sortable column header (Username, Name, Company, Country) to reorder the list.

Tips

- Check the **Pending** filter regularly to approve new registrations promptly.
- The **Last Active** column shows when a user last logged into the DAM site — useful for identifying inactive accounts.
- **Web Download** is the recommended starting level for most external users — it gives access to screen-resolution files without exposing high-resolution originals.

Activities

Activities

The Activities page is your central log for everything that happens with your clients — calls, emails, meetings, tasks, notes, and more. Use it to stay on top of follow-ups and keep a full history of your client interactions.

Key Features

- **Stats Overview**: Four at-a-glance counters show Total Activities, Pending Tasks, Overdue items, and activities Logged Today.
- **Quick Filters**: Instantly switch between All, Tasks, Notes, Calls, and Emails using the toolbar buttons.
- **Type Filtering**: Use the Type dropdown to narrow the list to any specific activity type (meetings, form submissions, bookings, invoices, payments, and more).
- **Status Filtering**: Filter by Pending or Completed to focus on what still needs attention.
- **Search**: Find any activity by searching its title or description.
- **Linked Records**: Each activity shows the Account, Contact, and/or Project it belongs to, plus a Related To column for system-generated items (quotes, contracts, invoices, forms, bookings).

- **Due Dates**: Tasks and follow-ups show a due date. Overdue dates are highlighted in red.
- **Mark Complete**: Mark any activity as done directly from the list row — no need to open a detail page.
- **Bulk Delete**: Select multiple activities and delete them all at once.

How to Use

Log a New Activity

1. Click **Log Activity** in the toolbar.
2. Choose a **Type**: Note, Call, Email Sent, Meeting, Task, Follow-up, or Custom.
3. Enter a **Title** (required) and an optional **Description**.
4. Optionally link the activity to an **Account**, **Contact**, and/or **Project**.
5. For tasks or follow-ups, set a **Due Date**.
6. Click **Save**.

Filter and Search

- Use the **All / Tasks / Notes / Calls / Emails** buttons to quickly filter by category.
- Use the **Type** and **Status** dropdowns in the list header for more specific filtering.
- Type in the search box to find activities by title or description.

Mark an Activity Complete

- Click the **Complete** button on any activity row.
- The activity status updates to Completed and is removed from your overdue and pending counts.

Delete Activities

- To delete one activity, click the **Delete** button on its row.
- To delete several at once, check the boxes next to them and click **Delete Selected**.

Tips

- Check the **Overdue** stat card daily to make sure no follow-ups slip through.
- Activities are automatically logged by the system when you send quotes, contracts, invoices, or when clients submit forms, make bookings, or complete payments — your history builds itself.

- Link activities to Accounts and Projects so the full timeline appears in those records too.

AirBeta

AirBeta

AirBeta is your beta program control center — manage applications, testers, referrals, feedback, and automated emails all in one place.

Key Features

- **Dashboard Stats**: Live counts of total applications, active testers, referrals, and average AI score at a glance
- **AI-Powered Scoring**: Every application is automatically evaluated on Fit (35%), Urgency (25%), Value (30%), and Referral bonus (10%) — scored 0–100 with tier recommendations
- **Follow-Up Questions**: Borderline applications receive AI-generated follow-up questions to gather more context before a final decision
- **Application Pipeline**: Review, approve, reject, or waitlist applicants individually or in bulk
- **Tester Management**: View all active beta testers, their tiers, referral codes, and activity
- **Referral Leaderboard**: See which testers are referring the most people and automatically upgrade their tier as a reward
- **Feedback Tracker**: Collect and triage bugs, ideas, improvements, questions, and other submissions from testers
- **Email & Settings**: Customize automated emails, manage tiers, and configure referral rules

How to Use

Reviewing Applications

1. Click the **Applications** tab to see all incoming applications
2. Click any row to open the full detail, including the AI score breakdown (Fit, Urgency, Value) and rationale
3. Select a **tier** (Explorer, Builder, or Pioneer) and optionally add review notes
4. Click **Approve**, **Reject**, or **Waitlist** — the applicant receives an automatic email

5. To act on many at once, check multiple rows and use the batch action buttons

AI Score Guide: 80–100 → Pioneer · 60–79 → Builder · 40–59 → Explorer · 20–39 → Waitlist · Below 20 → Reject

Managing Testers

1. Click the **Testers** tab to see all approved testers
2. Filter by tier or active status using the filter bar
3. Click a tester to view their profile, referral history, and recent feedback
4. Use the toggle button to activate or deactivate a tester
5. Select multiple testers and click **Deactivate** to remove access in bulk

Referrals

1. Click the **Referrals** tab to see the leaderboard and conversion stats
2. Each approved tester gets a unique referral code to share
3. Testers who refer enough people earn tier upgrades automatically:
    - 3 referrals → tier upgrade
    - 5 referrals → early access
    - 10 referrals → lifetime beta
4. Click the chain icon on any leaderboard row to see everyone that tester referred
5. Click the upgrade arrow to apply an earned promotion manually

Feedback

1. Click the **Feedback** tab to see all tester submissions and top reporters
2. Filter by type (Bug, Idea, Improvement, Question, Other), priority, or status
3. Click any item to read the full description and set a status (Submitted → Reviewed → Planned → In Progress → Implemented → Shipped or Won't Fix)
4. Use the **Priority** dropdown to flag critical issues
5. Select multiple items and click **Delete** to remove resolved or irrelevant feedback

Settings

1. Click the **Settings** tab to configure spots available, the application form headline, incentives, email templates, and referral rules
2. Select any lifecycle event (Application Received, Follow-Up Ready, Approved, Rejected, Waitlisted, Referral Success, Tier Upgraded, Inactive Reminder, Feedback Acknowledged) to

edit its subject and body

3. Use **Preview** to see how the email will look, or **Send Test** to deliver a sample to yourself

Tips

- The **Application Form** link (top right) opens the public apply page — share it with candidates
- Approving an application automatically creates the tester record and sends a welcome email with their referral code
- Borderline applicants (40–79 score) may receive follow-up questions — their answers are factored into a re-evaluation before a final recommendation
- Testers inactive for 7+ days can receive a re-engagement email via the inactive reminder tool
- The master referral code gives applicants a bonus AI score boost at evaluation time

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AirBlog — Blog Engine

AirBlog is Pilot's built-in blog engine. Create, manage, and publish blog posts with a full-featured editor, category organization, reader comments, and RSS feeds.

Key Features

- **Post Editor**: Rich text editor with formatting, media embedding, live reading time, and auto-generated URL slugs. Preview posts on the live site before publishing.
- **Publishing Controls**: Draft, publish, schedule, or archive posts. Mark as featured or sticky. Set visibility to public or password-protected.
- **Categories**: Color-coded, icon-tagged categories with parent/child nesting. Posts can belong to multiple categories.
- **Tags**: Free-form tags with bulk management — rename, merge, or delete tags across all posts from the Tags tab.
- **Comments**: Threaded comments with replies. Rate limiting and honeypot spam protection built in. Moderation modes: approve-after-first-comment or manual. Moderators can approve, spam-flag, trash, reply, or pin comments individually or in bulk. Readers can like comments and opt in to email notifications when someone replies to them.
- **Media Library**: Browse and insert images or videos from your Assets Manager as inline

content or featured images. Drag-and-drop upload directly into the editor.

- **SEO Fields**: Meta title (60 chars), meta description (155 chars), keywords, canonical URL, schema type, and robots settings with live character count guidance.
- **RSS Import**: Pull posts from external feeds at hourly, 6h, 12h, or daily intervals. Preview items before importing; auto-download images. Duplicate detection skips already-imported items.
- **AI Assistant**: Generate articles, outlines, title ideas, excerpts, or improve existing content. Create images with DALL-E. Choose tone (Professional, Casual, Friendly, Authoritative, Humorous) and length.
- **Blog Settings**: Configure posts per page, choose a theme, and toggle display options — sidebar, author info, reading time, social share buttons, related posts, and search.
- **Dashboard Stats**: Published posts, drafts, total views, and pending comments at a glance.

How to Use

1. Open **AirBlog** from the sidebar and select a site from the top filter.
2. Click **New Post**. Enter a title — the URL slug fills in automatically.
3. Write in the editor, format text, and insert media from your library. Toggle between **card** and **list** view to browse existing posts.
4. In the right panel, set categories, tags, featured image, and visibility.
5. Expand **SEO** to add meta title and description, or use the AI wand to generate them automatically.
6. Click **Save Draft** or **Publish**. Use **Schedule** to set a future publish date.
7. Manage comments in the **Comments** tab — approve, reply, spam, or trash individually or in bulk.
8. To import content, go to **RSS Import**, add a feed URL, set the fetch interval, and click **Fetch Now** to preview before importing.

Tips

- Use the **AI Assistant** (wand icon in the editor) to draft articles, improve existing content, generate title ideas, or create images — then edit to match your voice.
- Set comment moderation to **"First"** in Blog Settings to auto-approve returning readers while still screening new ones.
- **Batch actions** let you publish, unpublish, duplicate, or delete multiple posts at once from the post list.
- **Sticky posts** always appear at the top of your blog listing regardless of publish date.

- Use **Merge Tags** to consolidate duplicate tags across all posts in one step.
- **Pin a comment** to keep it at the top of the thread — useful for highlighting a helpful reader question or a key reply.

AirBook

AirBook

AirBook lets you create shareable booking pages so clients can schedule appointments with you — no back-and-forth emails required.

Key Features

- **Event Types**: Create multiple booking types (consultations, demos, check-ins) each with their own duration, location, and availability rules
- **Shareable Booking Links**: Each event type gets a unique public link you can share with clients or embed on your website
- **Flexible Availability**: Set which days and hours you accept bookings per event type, including multiple time slots per day
- **Buffer Times**: Add automatic buffer time before and/or after appointments so you're never double-booked or rushed
- **Booking Controls**: Set how far in advance clients can book, minimum notice required, and a daily booking cap
- **Approval Mode**: Optionally require you to approve bookings before they're confirmed
- **Confirmation Message**: Add a custom message shown to clients after they book
- **Appointment Dashboard**: View all upcoming and past appointments in one place with full client details
- **Stats Overview**: At-a-glance counts for today's bookings, upcoming appointments, completed, and cancelled

How to Use

Create an Event Type

1. Go to **AirBook** in the sidebar
2. Click **New Event Type**
3. Fill in the **Details** tab: name, description, duration (15 min to 2 hours), and location type (video call, phone, in-person, Zoom, Google Meet, or custom)
4. Switch to the **Availability** tab and set which days and times you're available — click **Add Time Slot** to add multiple windows per day
5. Switch to the **Settings** tab to configure buffer times, booking window, minimum notice, and whether approval is required
6. Click **Create**

Share Your Booking Link

1. On the Event Types tab, find your event and click the **link icon**
2. Copy the booking URL that appears
3. Send it to clients or add it to your website — anyone with the link can book without needing an account

Manage Appointments

1. Click the **Appointments** tab to see all bookings
2. Click any appointment to view full details: client name, email, notes, and booking time
3. From the detail view you can confirm, cancel, or add private host notes to any appointment

Duplicate or Toggle an Event Type

- Use the **duplicate** option on any event type card to create a copy with the same settings
- Toggle an event type off to stop accepting new bookings without deleting it

Tips

- Set a minimum notice of at least a few hours to avoid last-minute surprises
- Use different colors for each event type to tell them apart at a glance
- Buffer time after appointments gives you prep time before the next call
- The booking window controls how far ahead clients can schedule — 60 days is the default

AirCatalog — Product Catalogs

AirCatalog lets you create professional product catalogs with pricing, descriptions, and images. Share them online via a link or export as a PDF for print and email.

Key Features

- **Catalog Management**: Create multiple catalogs with Draft or Published status. Duplicate an existing catalog to quickly create a variation.
- **Product Editor**: Each product supports a name, SKU, price, sale price, availability status (Available, Limited, Sold Out, Coming Soon), short and long descriptions, a features list, variants with individual pricing, tags, and a custom call-to-action button.
- **Categories**: Organize products into categories within each catalog. Editors and visitors can filter the product grid by category.
- **Asset Integration**: Pick product images from your existing Assets Manager library, or upload new files directly from the product picker. Supports images, videos, documents, and audio.
- **AI Descriptions**: Automatically generate product descriptions using AI — for all products in a catalog at once, or one at a time (3 credits per product).
- **PDF Export**: Download a formatted PDF of any catalog for printing or sharing by email.
- **CSV Export**: Export all product data from a catalog as a spreadsheet.
- **Sharing**: Generate a public share link so clients can browse a catalog online without logging in. Links can be revoked at any time.
- **Site Display**: Assign a catalog to one of your Airmail sites and control whether the site shows all catalogs or a specific one.
- **Display Settings**: Choose grid layout, number of columns, currency, and toggle visibility of prices, descriptions, variants, and the category filter.

How to Use

1. Go to **AirCatalog** in the sidebar.
2. Click **New Catalog**, enter a name and optional description, then click **Create**.
3. Inside the catalog editor, click **Add Product** to pick an image from your assets or upload a new one.
4. Fill in the product details — name, price, availability, description — then click **Add**.
5. Click any product card to edit its details, add features, variants, or a call-to-action link.
6. Use the **Categories** panel on the left to organize products into groups.

7. Open the **Settings** tab to set currency, layout, and display preferences.
8. When ready, go to the **Sharing** tab to generate a public link, or click the PDF button to download the catalog.

Tips

- Set a sale price on a product to display the original price crossed out with the discounted price shown alongside.
- Use **Duplicate** from the catalog menu to copy an entire catalog — useful for seasonal or client-specific versions.
- The **AI Descriptions** button generates copy for all products at once, saving significant time for large catalogs.
- Assign a catalog to a site to make it appear automatically on your public-facing storefront page.

AirChat — AI Chatbot

AirChat is Pilot's AI-powered chatbot. It provides automated customer support on your website with intelligent responses grounded in your knowledge base.

Key Features

- **Multi-Provider AI**: Uses Claude (Anthropic) as the primary AI, with fallback to OpenAI and DeepSeek for reliability
- **Knowledge Base**: Add documentation and FAQs the AI uses to answer questions accurately about your business
- **Embeddable Widget**: Add the chat widget to any website with a single script tag — no dependencies required
- **Conversation Persistence**: Chats are saved in the visitor's browser and resume automatically on page reload
- **Conversation History**: Visitors can browse past conversations from the clock icon in the widget header
- **Human Escalation**: Visitors can request human support via the "Human" button. The AI also detects low-confidence responses and suggests escalation. Admin receives an email with the conversation transcript

- **Escalation Alerts**: When a visitor escalates, you get a desktop browser notification, an audio alert, and an on-screen toast. The Conversations tab shows a live badge count of open escalations
- **Availability Toggle**: Set your team's availability with the "Accepting Chats" toggle in Settings. When off, escalated visitors see a message that the team is away
- **Admin Reply**: Reply to escalated conversations directly from Pilot, with optional image attachments. Replies appear in the visitor's widget within 10 seconds
- **Typing Indicators**: Visitors see when an admin is typing, and vice versa, in real time
- **Image Sharing**: Visitors can attach and send images (PNG, JPG, WebP, GIF — up to 5MB) during a conversation
- **Satisfaction Ratings**: Visitors can rate individual AI responses (thumbs up/down). Overall satisfaction stats appear at the top of the Conversations tab
- **Bug Tracker**: Visitors can report bugs from the widget. Review them in the Bugs tab, track open/fixed counts, and vote on which to fix first
- **Feature Requests**: Visitors can submit feature ideas. Review and vote on them in the Features tab to prioritize your roadmap
- **News Publishing**: Publish product announcements, updates, and fixes that appear in the widget's News tab for visitors to read
- **Email Capture**: Optionally collect visitor emails before or during chat. Captured emails are added to your CRM contacts automatically
- **Customization**: Set the bot name, persona, widget color, position, welcome greeting, avatar, header logo, gradient color, and team avatars
- **Domain Restrictions**: Control which domains can display your chat widget

How to Use

Managing Conversations

1. Open the **Conversations** tab to see all chat sessions
2. Filter by status (Active, Escalated, Awaiting Reply, Resolved, Closed)
3. Use the search bar to find conversations by visitor name or email
4. Click a conversation to view the full thread and reply to escalated chats

Escalation Workflow

1. Visitor clicks "Human" or the AI detects a low-confidence response
2. Status changes to "Escalated" — you receive an email, a desktop notification, and an audio alert

3. A yellow "Waiting for a support agent" bar appears in the visitor's widget
4. Open the conversation in Pilot and type a reply in the admin reply form
5. The visitor sees your reply as a "Support Agent" bubble within 10 seconds
6. Mark the conversation Resolved when done

Bugs & Feature Requests

1. Go to the **Bugs** or **Features** tab to review visitor-submitted items
2. Filter by status (New, Reviewed, Planned, Fixed/Implemented, Declined) or sort by votes
3. Click any item to update its status and add internal notes
4. Vote on items to surface the highest-priority ones — visitors can vote too from the widget

Publishing News

1. Go to the **News** tab and click **New News**
2. Add a title, summary, and full content (markdown supported)
3. Set the category (New Feature, Update, Improvement, Fix) and visibility (Public or Beta Only)
4. Click **Save & Publish** to make it visible in the widget, or **Save as Draft** to finish later

Knowledge Base

1. Go to the **Knowledge Base** tab
2. Click **Add Entry** to create a documentation entry (General, Product, Support, Pricing, Technical, FAQ). Optionally attach a screenshot (max 2MB)
3. Click **Sync KB** to rebuild the AI's knowledge index

Settings

Configure in the **Settings** tab:

- **Bot Configuration**: Name, AI provider, persona/system prompt, provider fallback toggle, Chat Active on/off
- **Widget Appearance**: Color, position (bottom-right or bottom-left), email capture mode, allowed domains
- **Home Screen & Branding**: Welcome greeting, bot avatar, header logo, gradient color, team member avatars, help articles toggle, news tab toggle
- **Usage**: View monthly message count against your plan limit

Embed Code

Copy the script snippet from the **Embed Code** tab and paste it before the closing `</body>` tag on your website.

Tips

- A detailed bot persona in Settings improves response quality and tone
- Organize knowledge base entries by category so the AI can surface the most relevant content
- Enable provider fallback so the widget stays online if one AI provider has an outage
- Turn off "Accepting Chats" when your team is away — visitors get an honest message instead of waiting indefinitely
- Use "Required" email capture to ensure every visitor is added to your CRM contacts
- Team avatars (up to 4) appear on the widget home screen to give it a personal, branded feel
- Use the "Chat Active" toggle to temporarily disable the widget without removing the embed code from your site
- Publish news items regularly to keep visitors informed about product updates directly in the widget

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AirDAM

AirDAM

AirDAM connects your Air4 account to your DAM site — letting you customize your public portal's appearance and browse all site content including stories, assets, accounts, workflows, and delivery logs.

Key Features

- **Portal Design Editor**: Customize how your public DAM portal looks — choose a theme preset, set colors, upload your logo and watermark, and pick a font. Changes are live-previewed before saving.
- **Theme Presets**: One-click presets (Dark Pro is the default) give you a polished starting point — adjust any color from there.

- **Branding**: Set a portal name, upload a logo (PNG/SVG), and add a watermark that appears on downloaded assets.
- **Site Selector**: Switch between DAM sites from the topbar — all content and design settings update instantly.
- **Stories**: Browse photo and video stories with thumbnails, dates, catalogs, credits, tags, and exclusive flags.
- **Assets**: View individual media files with full metadata — headline, keywords, location, file size, and cloud vs. local storage status.
- **Accounts**: See all registered users with access levels; approve pending accounts with one click.
- **Collections & Catalogs**: Browse content collections and photo/video catalogs.
- **Groups**: View user groups assigned to the DAM site.
- **Workflow**: Monitor FTP in/out queues, distribution lists, processing rules, web uploads, and the delivery queue.
- **Downloads**: Review download history across the site.
- **Safeboxes**: Check secure download packages and their Active/Expired status.
- **Lightboxes**: Browse user-created lightbox collections.
- **Newsletter**: View newsletter content items.
- **Stats**: Monitor delivery destinations — see pending file counts, status, and errors; activate stalled tasks or clear error queues.
- **Logs**: Review distribution history by destination with date range filtering.

How to Use

1. Select a DAM site from the site selector in the top navigation bar
2. The **Portal Design** editor opens — choose a preset, adjust branding and colors, then click **Save**
3. To browse site content, use the AirDAM section links in the sidebar (Stories, Assets, Accounts, etc.)
4. Click any row to open a detail panel with full information
5. In **Accounts**, click **Approve** on a pending account to grant Web Download access
6. In **Workflow**, use sub-tabs to monitor FTP jobs, processing rules, and the delivery queue
7. In **Stats**, click a destination row to see its queued files; use **Activate** or **Delete** to manage stuck tasks
8. In **Logs**, set a date range and browse delivery history; click a destination to see individual log entries

Tips

- Upload your logo as a **PNG or SVG with a transparent background** for best results on any theme
- The **watermark** is applied automatically to assets when clients download them — use a semi-transparent PNG
- The **Exclusive** badge on stories flags premium content — use it to quickly spot restricted material
- The **S3** badge on assets means the file is in cloud storage; **Local** means it is on the server
- Access levels range from Guest and Pending up to Full Download and Admin — review these before approving new users
- A red error badge on a Stats destination means delivery has failed — use **Activate** to retry
- If no site is selected, a prompt appears — pick a site from the topbar to activate the module

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AirDoc

AirDoc

AirDoc is your knowledge base management dashboard — a central place to view, preview, and manage all help documentation for your platform.

Key Features

- **KB Article Library**: Browse all knowledge base articles in one table, with thumbnails, category labels, file sizes, and last-modified dates.
- **Article Preview**: Read any article in a formatted preview panel, complete with a screenshot banner when one is available.
- **Screenshot Lightbox**: Click any screenshot thumbnail to view it full-size in an overlay.
- **Retake Screenshot**: Refresh the screenshot for any individual article with one click — the system captures and uploads the latest version automatically.
- **AirChat Sync**: Push all KB articles into AirChat's knowledge base so the AI assistant can answer questions based on the latest documentation.
- **Regeneration Control**: Flag all pages for documentation regeneration — the KB Agent will automatically rewrite outdated articles on its next cycle.

- **Public Docs Link**: Jump directly to the public-facing support site to see what your users see.
- **PDF Export**: Download any individual article or the full documentation set as a PDF.

Dashboard Stats

At the top of the page, four cards give you an at-a-glance view of your KB health:

- **KB Articles** — total number of documentation files
- **Screenshots** — how many articles have a screenshot (shown as count/total)
- **Flagged for Update** — articles queued for regeneration
- **KB Agent** — whether the documentation agent is currently running; its last heartbeat time appears in the actions bar below

How to Use

1. Open **AirDoc** from the admin menu.
2. The article list loads automatically. Use the **Filter** box in the top-right of the table to search by title or category.
3. Click the **eye icon** on any row to open a formatted preview of that article.
4. Click a **screenshot thumbnail** to expand it full-size. Press Escape or click outside to close.
5. Click the **camera icon** on any row to retake its screenshot — useful after a page has been redesigned.
6. To push all articles to AirChat, click **Sync KB** in the top-right toolbar and confirm.
7. To queue all pages for fresh documentation, click **Flag All Pages for Regeneration** and confirm.
8. Use **Download Full PDF** in the actions bar to export the entire documentation set, or use the PDF icon on any row for a single article.
9. Use the **View Public Docs** button to check the live support site.

Tips

- Run **Sync KB** after any significant documentation update to keep AirChat informed.
- The **Flagged for Update** count drops to zero after the KB Agent finishes its regeneration cycle.
- Each article row has four action icons: preview, view public page, download PDF, and retake screenshot.
- Articles without a screenshot show a placeholder icon — use the retake screenshot button to

add one.

AirForms — Form Builder

AirForms is a form builder and lead management tool. Create custom forms for your website, capture leads directly into your CRM, and track every submission.

Key Features

- **Visual Form Builder**: Drag-and-drop builder with 21 field types — text, email, phone, dropdown, checkboxes, file upload, date/time, rating, range slider, and layout elements like headings and dividers
- **AI Form Generation**: Describe your business and goal, and AI builds a complete form for you (uses AI credits)
- **AI Submission Analysis**: Automatically analyze incoming submissions with AI, generate a reply draft, and optionally send it with or without your approval
- **CRM Integration**: Automatically create contacts from submissions, with field mapping to your contact records
- **Contract Integration**: Link a contract template to your form so a contract is automatically created when someone submits
- **Submission Tracking**: View all submissions with status labels — New, Read, Replied, Archived, or Spam
- **Email Notifications**: Get notified by email when someone submits a form
- **Auto-Reply**: Send an automatic response to anyone who fills out your form
- **Embed Anywhere**: Place forms on any website using a JavaScript snippet or iframe code
- **Spam Protection**: Built-in honeypot and submission limits to filter out bots
- **Conditional Logic**: Show or hide fields based on answers to other fields
- **Custom Styling**: Forms inherit your site's colors and fonts automatically, with full CSS customization available

How to Use

1. Go to **AirForms** in the sidebar
2. Click **New Form** to start from scratch, or use **Generate with AI** to describe what you need
3. In the form builder, drag fields from the left panel into your form

4. Click any field to edit its label, placeholder, required setting, and width
5. Use the **Settings** tab to configure notifications, auto-reply, CRM mapping, contract linking, and AI analysis
6. Use the **Design** tab to adjust colors, fonts, and button style
7. Click **Save**, then use **Embed** to get the code for your website
8. View responses by clicking **Submissions** on any form in the list

Managing Submissions

- Filter by status (New, Read, Replied, Archived, Spam) or date range
- Search submission content to find specific responses
- Update a submission's status as you work through leads
- Add internal notes to any submission
- Export submissions to CSV for reporting
- Trigger AI analysis on any submission manually, or enable auto-analysis on every new submission

Tips

- Use **Duplicate** to copy a form and create variations without starting over
- Map your form fields to CRM fields so new contacts are created automatically on submission
- Set a **Redirect URL** to send users to a thank-you page after they submit
- Use **Copy to Site** in batch actions to reuse a form across multiple sites
- Enable **Approval Required** on AI auto-responses to review the draft before it sends
- AI-generated forms include strategic reasoning for each field — check the form summary to understand the approach

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AirGallery — Image Galleries

AirGallery lets you create beautiful image galleries, share them publicly with a link, and embed them on any website.

Key Features

- **Gallery Management**: Create, edit, duplicate, and archive galleries from a central dashboard showing total counts, published status, and shared galleries at a glance
- **Flexible Layouts**: Choose between Grid, Masonry, and Carousel layouts with adjustable columns (2–6), spacing, and aspect ratio
- **Asset Uploads**: Drag and drop images, videos, audio, and documents directly into a gallery (up to 100MB per file), or pick from your existing Asset Manager library
- **Image Ordering**: Drag images to reorder them within the editor; use bulk select to remove multiple at once
- **Per-Image Details**: Set custom captions, alt text, featured status, and control which images are visible to viewers
- **AI Captions**: Generate captions for all gallery images automatically with one click
- **Sharing**: Generate a public share link with view-only, caption-editing, or full access. Optionally protect with a password and set an expiry date
- **Email Invitations**: Send a gallery link directly to a recipient's email with a personal message
- **Download Options**: Allow visitors to download individual images or the entire gallery as a ZIP file
- **Display Options**: Enable lightbox, show captions and photo credits, display EXIF camera data, watermark images, and choose between pagination or infinite scroll
- **Style Controls**: Set background color, thumbnail size, hover effects (zoom, fade, slide), and apply design presets

How to Use

1. Go to **AirGallery** in the sidebar and click **Create Gallery**
2. Name your gallery — it opens in the editor as a draft
3. Click **Add Assets** to upload new files or pick from your existing media library
4. Drag images to reorder them; click any image to edit its caption and settings
5. Open the **Settings** tab to choose layout, columns, and display options
6. Open the **Style** tab to set colors and hover effects
7. When ready, open the **Sharing** tab and click **Generate Share Link** to make the gallery public
8. Copy the link or send it by email — recipients can view (and optionally edit captions) without logging in
9. Save the gallery and set its status to **Active** to publish it

Tips

- Use **Duplicate** to create a new gallery based on an existing one without starting from scratch
- Enable **Download All** to let visitors save the full gallery as a ZIP — use **Rebuild ZIP** if you update the images afterward
- Set an expiry date on share links for time-sensitive projects such as event photos or client proofs
- Use **AI Captions** as a starting point, then refine individual captions in the image detail panel
- Assign a gallery to a specific site using the site dropdown in the editor header to keep content organized per project

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AirMail Sites

AirMail Sites

Your newsletter site is a public-facing website where subscribers can browse, read, and sign up for your newsletters — no login required.

Key Features

- **Newsletter Archive**: A branded, browsable archive of all your published newsletters with cover images, excerpts, and reading time estimates.
- **Category Filtering**: Subscribers can filter newsletters by topic using category buttons at the top of the archive.
- **Single Newsletter View**: Each newsletter opens as a full-page article with a reading progress bar, author bio, and social sharing options (Facebook, Twitter, LinkedIn, WhatsApp, Email, Copy Link, Print).
- **Previous / Next Navigation**: Readers can move between newsletters without going back to the archive.
- **Subscribe Form**: Visitors enter their email to subscribe. A confirmation email is sent automatically (double opt-in).
- **Email Verification**: After clicking the link in the confirmation email, new subscribers complete their profile with a first name, last name, and optional phone number.

- **Email Preferences**: Subscribers can update their name, manage SMS notifications, or unsubscribe at any time via a preferences page.
- **Unsubscribe Flow**: One-click unsubscribe with optional feedback. Subscribers can resubscribe or switch to a lower email frequency instead.
- **Themes**: Choose from three visual themes — **Modern**, **Editorial**, or **Minimal** — each giving your site a distinct look.

How Subscribers Use Your Site

1. A visitor lands on your newsletter site and clicks **Subscribe**.
2. They enter their email address and accept the privacy policy.
3. A confirmation email is sent — they click the link to verify.
4. They enter their first name, last name, and optional phone number to complete signup.
5. They can now browse and read all your newsletters from the archive.

Managing Subscriber Preferences

Subscribers can visit their preferences page (linked in every email footer) to:

- Update their first and last name
- Add or remove a phone number for SMS notifications
- Unsubscribe from the newsletter

Unsubscribe Experience

When a subscriber clicks unsubscribe, they are shown alternatives — such as updating their preferences — before the unsubscribe is confirmed. They can also provide a reason (too many emails, content not relevant, etc.), which helps you understand list health.

Tips

- Choose a theme that matches your brand — you can preview it before going live from the Airmail dashboard.
- The newsletter URL path is set in **Airmail → Design Settings**. Keep it short and memorable.
- Reading time is calculated automatically and shown on each newsletter card — no extra setup needed.
- Social sharing buttons appear on every newsletter, making it easy for readers to spread your content organically.

AirPlan

AirPlan

Create and manage the pricing plans for your business, then track who is subscribed to each one.

Key Features

- **Pricing Plans**: Build unlimited plans with custom names, taglines, and pricing tiers
- **Flexible Billing**: Support monthly, annual, one-time, and free billing on each plan
- **Usage Limits**: Set per-plan limits for users, sites, storage, contacts, emails, and AI credits
- **Trial & Intro Offers**: Offer free trial periods and limited-time discounted pricing
- **Feature Lists**: Add a checklist of included features to each plan with drag-to-reorder
- **Subscriber Management**: Record and track who is subscribed, at what price, and in what status
- **Dashboard Stats**: See total plans, active plans, and monthly recurring revenue at a glance
- **Platform Features**: Browse all available platform modules to reference when building plans

How to Use

Create a Pricing Plan

1. Go to **AirPlan** and click **New Plan**
2. Enter a plan name — the URL slug is generated automatically
3. Add an optional **tagline** and **description** for the plan card
4. Set pricing:
    - **Monthly price** — entering this auto-fills the annual price (10× monthly)
    - **Annual price** — override the auto-calculated value if needed
    - **One-time price** — for non-recurring plans
5. Choose a **billing period** — Monthly, Annual, One-time, or Free
6. Set **trial days** for a free trial period
7. Configure an **intro offer** — a percentage discount for a set number of months

8. Set **usage limits** — max users, sites, storage (GB), contacts, emails/month, invoices/month, AI credits, and signup credits
9. Choose a **highlight color** to visually differentiate the plan in lists
10. Set the **sort order** to control the display position among plans
11. Toggle **Popular** to show a badge; toggle **Featured** to further highlight the plan
12. Add **features** with the **+ Add Feature** button — enter a label and optional value (leaving the value blank shows a checkmark). Drag rows to reorder them.
13. Click **Save Plan**

Manage Existing Plans

- Click **Edit** on any plan row to update its details
- Use **Archive** to hide a plan without deleting it; use **Restore** to bring it back
- Inactive plans are hidden from subscribers

Track Subscribers

1. Click the **Subscribers** tab
2. Click **Add Subscriber** and enter the subscriber's name and email
3. Select a plan, billing period, amount, and subscription start and end dates
4. Set the status: Active, Trialing, Paused, Past Due, or Cancelled
5. Add optional notes about the subscription
6. To cancel a subscription, click **Cancel** on the subscriber row and confirm

Browse Platform Features

Click the **Features** tab to view all available platform modules — including core tools (Website Builder, CRM, Invoicing, AI Engine) and Air modules — useful when designing what to include in each plan.

Tips

- Leave the annual price blank when creating a plan — it auto-calculates as 10× the monthly rate
- Mark your most popular plan with the **Popular** toggle to highlight it on pricing pages
- Use **Sort Order** to control the sequence in which plans are displayed
- Archive old plans instead of deleting them to preserve subscriber history

AirShop

AirShop

AirShop is your complete e-commerce store manager. Create and sell products with tiered pricing, manage orders from purchase to delivery, moderate reviews, and track reseller performance — all from one place.

Key Features

- **Dashboard Stats**: See active products, drafts, total orders, and revenue at a glance
- **Tiered Pricing**: Set separate Retail, Pro, and Cost prices per product
- **Product Variants**: Offer size, material, color, or any custom option with individual pricing and stock
- **Order Lifecycle**: Track orders from pending through confirmed, shipped, and delivered
- **Customer Tiers**: Segment buyers as Regular or Pro with an optional approval workflow
- **Coupon Engine**: Create percentage, fixed-amount, or free-shipping discounts with usage limits and expiry dates
- **Reseller Storefronts**: Give approved resellers their own branded storefront with custom commission rules
- **Reviews**: Collect and moderate customer product reviews with star ratings
- **Analytics**: Track revenue, order counts, top products, and customer trends over time

How to Use

Products

1. Go to the **Products** tab and click **New Product**
2. Fill in the name, SKU, type (Physical, Digital, Service, or Bundle), and description
3. Set your **Retail Price** — add Pro and Cost prices if needed
4. Enable **Track Inventory** to manage stock levels and set a low-stock alert
5. Attach photos, videos, or documents in the **Media** tab
6. Add **Variants** for products that come in multiple options (e.g., size or color)
7. Use the sidebar to assign categories, configure reseller access, add shipping dimensions, and write SEO text
8. Click **Save Draft** to save without publishing, or **Publish** to make it live

Orders

1. Open the **Orders** tab to view all incoming orders
2. Click an order to see full details: items, totals, shipping, and payment info
3. Change the order status (Confirmed → Processing → Shipped → Delivered) as you fulfill it
4. Click **Add Tracking** to enter a tracking number and carrier — a shipping notification is sent automatically
5. Add internal notes to communicate with your team about the order

Customers

1. Open the **Customers** tab to browse all buyers
2. Click a customer to view their order history, total spent, and contact info
3. Change their **Customer Tier** (Regular or Pro) and set Pro status as needed
4. Add internal notes to track customer preferences or special agreements

Resellers

1. Open the **Resellers** tab to manage your wholesale partners
2. Promote an approved Pro customer to a reseller account
3. Set their commission type (markup %, percentage, or fixed amount), payout method, and minimum payout threshold
4. Configure custom branding colors for their public storefront
5. Control which products they can sell and set per-product minimum prices

Reviews

1. Open the **Reviews** tab to see all submitted reviews
2. Filter by status: **Pending**, **Approved**, or **Rejected**
3. Click a review to read its full content, then approve or reject it
4. Approved reviews appear on the public product page; rejected reviews are hidden

Analytics

1. Open the **Analytics** tab and select a time period (7 days, 30 days, 90 days, or 1 year)
2. Review total revenue, order count, average order value, and unique customers
3. See your top-selling products and a breakdown of orders by status and customer tier

Coupons

1. Go to the **Coupons** tab and click **New Coupon**
2. Enter a coupon code or click **Generate** for a random code
3. Choose the discount type: **Percentage**, **Fixed Amount**, or **Free Shipping**
4. Set optional rules: minimum order amount, usage limit, per-customer limit, and eligible customer tier
5. Set start and end dates to schedule the promotion
6. Toggle a coupon on or off at any time without deleting it

Settings

1. Open the **Settings** tab to configure currency, order number prefix, tax rate, and shipping defaults
2. Toggle guest checkout, product reviews, and Pro registration as needed
3. Click **Save Settings** to apply changes across your store

Tips

- Use **Duplicate** on a product to quickly create similar listings without starting from scratch
- Set a **Minimum Reseller Price** to protect your margins while allowing reseller flexibility
- Scheduled coupons with start/end dates are great for seasonal promotions — set them up in advance
- The **Compare At Price** field shows a strikethrough original price on the storefront, highlighting discounts
- Keep the **Cost Price** field updated to track your actual profit margins per product

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Airmail — Email Marketing

Airmail is Pilot's email marketing module. Manage subscribers, build campaigns, and track performance — all from one dashboard.

Dashboard Overview

The main Airmail page shows four live stats at the top: total campaigns, active subscribers, average open rate, and emails sent this month. Below that you'll find your five most recent campaigns with their status and open rates, plus a feed of your latest subscribers with a growth chart.

Key Features

- **Campaign Builder**: Create newsletters, announcements, welcome emails, and promotions. Set a subject line, preheader text, audience segment, and send immediately or schedule for later.
- **Subscriber Management**: View and manage your list with full profile data — name, email, phone, source, and status. Segments include all subscribers, active only, and new this month.
- **Subscriber Growth Chart**: Visual chart showing how your list grows over time.
- **Newsletter Design**: Customize your public newsletter site — logo, colors, fonts, theme (Editorial, Modern, or Minimal), social links, footer text, and URL path. Includes design presets and custom CSS.
- **Email Settings**: Configure SMTP for sending campaigns. Quick-setup presets for Gmail, Outlook, Yahoo, and AWS SES. Three tabs: SMTP Configuration, Sender Settings, and Custom Headers.
- **Custom Headers**: Add email headers for tracking, one-click unsubscribe, priority, or authentication — with template buttons for common setups.
- **Public Newsletter Site**: Subscribers get a full public site with a newsletter archive, signup form, preferences page, and unsubscribe flow.
- **Campaign Analytics**: Track opens and clicks per campaign. Forwarded emails are detected automatically for a fuller picture of reach.

How to Use

1. Open **Airmail** from the sidebar.
2. Click **New Campaign** (top right) or **Create Campaign** in Quick Actions.
3. Fill in the campaign name, type, subject line, and optional preheader text.
4. Write your content in the editor, choose your audience segment, and set the send time.
5. Click **Send Campaign** to send immediately, or **Save Draft** to finish later.

Setting Up Your Newsletter Design

1. Scroll to the **AirMail Design** section on the dashboard.
2. Enter your newsletter name and optional tagline.
3. Upload a logo (PNG recommended, 200×50px).

4. Optionally apply a **Design Preset** for a coordinated color and font style.
5. Choose a theme: **Editorial**, **Modern**, or **Minimal**.
6. Pick your primary and secondary colors, body font, and heading font.
7. Add social media links (Facebook, Twitter/X, LinkedIn, Instagram, Pinterest, TikTok).
8. Set the newsletter URL path, footer text, and copyright line.
9. Optionally add custom privacy policy, terms of service text, or **Custom CSS**.
10. Click **Save All Settings**. Use **Preview** to see how your newsletter site looks.

Configuring Email Settings

1. Click **Email Settings** in Quick Actions.
2. On the **SMTP Configuration** tab, enter your mail server details or click a quick-setup preset.
3. Click **Test Connection** to verify settings.
4. Switch to **Sender Settings** to set the From name, From email, and Reply-To address.
5. Use the **Custom Headers** tab to add tracking, unsubscribe, priority, or authentication headers.
6. Click **Save Settings**.

Tips

- Keep subject lines under 50 characters for best open rates.
- Use the preheader field — it appears as preview text in most email apps.
- The Preview button opens your live newsletter site so you can check how it looks to subscribers.
- If you manage multiple sites, switch between them using the site selector in the top bar — the dashboard updates automatically.
- Adding a one-click unsubscribe header (via Custom Headers) improves deliverability with major email providers.
- Subscribers can update their own name, phone, and category preferences from the preferences page on your newsletter site.

Appointments

Appointments

Manage all your scheduled meetings, calls, and client appointments in one place. Track status, link appointments to accounts, contacts, and projects, and filter your schedule by time or type.

Key Features

- **At-a-glance stats**: See counts for Upcoming, Confirmed, Today, and Cancelled appointments. Click any stat card to instantly filter the list to that group — click it again to clear the filter.
- **Searchable list**: Search appointments by title, description, location, or notes. Sort by date, type, account, contact, or status.
- **Flexible filtering**: Filter by appointment type (Consultation, Site Visit, Meeting, Call, Demo, Follow-up, Custom), status, or location type (In Person, Phone, Video Call, Zoom, Google Meet).
- **Time filters**: Quickly switch between All, Upcoming, and Past appointments.
- **CRM linking**: Attach appointments to any Account, Contact, or Project for a full activity history.
- **Calendar view**: Switch to the Calendar to see appointments in a monthly, weekly, or daily layout — including linked project events and project date ranges.
- **Online booking**: Set your availability so clients can book appointments directly from a public booking page.

How to Use

Create an appointment

1. Click **New Appointment** in the top right.
2. Enter a title and select the appointment type.
3. Set the start and end date/time. The end time automatically defaults to one hour after the start. Check **All Day Event** if no specific time is needed.
4. Choose a location type. For virtual meetings (Video Call, Zoom, Google Meet), paste your meeting link. For in-person or phone, enter the address or leave it blank.
5. Optionally link to an Account, Contact, or Project.
6. Click **Save**.

Edit or delete an appointment

- Click **Edit** on any row to update details.
- Click **Delete** on a row to remove a single appointment.
- Select multiple appointments using the checkboxes, then use **Delete Selected** to remove them in bulk.

Update appointment status

When editing an appointment, change the **Status** field to reflect the current state:

- **Scheduled** — booked but not yet confirmed
- **Confirmed** — client has confirmed
- **Completed** — the appointment took place
- **Cancelled** — cancelled by either party
- **No Show** — client did not attend

Switch to Calendar view

Click **Calendar View** to see your appointments laid out on a calendar. The calendar also displays events and timelines from your Projects.

Tips

- Click a stat card (Upcoming, Confirmed, Today, Cancelled) to instantly filter the list — click it again to clear the filter.
- Use the **Upcoming** button to focus on what's next without scrolling through past appointments.
- Link every appointment to a Contact or Account so your full meeting history appears in their CRM record.
- For virtual meetings, selecting Zoom, Google Meet, or Video Call hides the address field and shows a meeting link field instead.
- Use the **Custom** type for any appointment that doesn't fit the standard categories.
- Set up your availability rules to enable your public booking page, letting clients schedule time with you directly.

Assets

Assets

Browse and inspect the media files stored in your Digital Asset Management (DAM) site — images, videos, and other files organized by story.

Key Features

- **Asset Library**: View all media files for your selected DAM site in a searchable, paginated list
- **Thumbnail Previews**: Each asset displays a preview image so you can visually identify files at a glance
- **Asset Detail**: Click any asset to open a full detail panel showing filename, subject, headline, credit, keywords, location, file size, and storage location
- **S3 vs Local Indicator**: Each asset shows whether it is stored in cloud (S3) or locally, so you always know where your files live
- **Site Selector**: Use the topbar site selector to switch between DAM sites — the asset list updates automatically
- **Stats Bar**: A summary bar at the top shows total counts for Stories, Assets, cloud-hosted files, Accounts, and Downloads across the selected site
- **Search & Sort**: Filter assets by keyword and sort by any column to quickly find what you need

How to Use

1. Select a DAM site from the topbar site selector — the asset list will load automatically
2. Browse the list to see all assets with their thumbnails and key details
3. Click on any asset row to open the detail view with the full file information
4. Use the search box to filter by filename, subject, keywords, or other metadata
5. Click any column header to sort the list by that field
6. Use the pagination controls at the bottom to move through large libraries

Tips

- If no assets appear, make sure a DAM site is selected in the topbar
- The cloud icon (S3) means the file is stored on Amazon S3; "Local" means it is stored on the

server
- Asset counts in the stats bar update whenever you switch sites, giving you a quick overview before diving in
- Click through to a Story from the Assets list to see all the other files that belong to the same editorial package

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Assets Manager — Digital Asset Management

The Assets Manager is Pilot's digital asset management (DAM) system. It provides centralized storage and organization for all your media files — images, videos, audio, and documents — across your sites.

Key Features

- **Grid & List Views**: Switch between a visual grid layout and a detailed list view using the toggle in the top-right corner
- **Stats Dashboard**: See your total asset count, storage used, and breakdowns by type at a glance (collapsible to save space)
- **Cloud Storage**: All assets are stored on Wasabi S3 cloud storage for reliable, fast delivery
- **AI Image Generation**: Create images directly from a text prompt using DALL-E 3 (5 credits) or Gemini (3 credits), with control over size, quality, and aspect ratio
- **Collections**: Organize assets into named collections — Galleries, Catalogs, Campaigns, Collections, Albums, and Projects. Group the view by collection to browse related files together
- **Metadata & EXIF**: Each asset stores title, alt text, description, tags, copyright, and usage rights. For photos, camera EXIF data (model, capture date, aperture/shutter) is extracted automatically, with a raw EXIF/IPTC viewer available
- **Usage Rights**: Track licensing status — Commercial, Editorial, Restricted, or Unknown — for each asset

How to Use

Uploading Assets

1. Click **Import Assets** in the top-right
2. Select a **Site** to associate the files with

3. Optionally assign the upload to a Campaign, Gallery, or Catalog
4. Drag and drop files onto the upload area, or click to browse — images up to 10 MB (JPG, PNG, GIF, WebP) and videos up to 100 MB (MP4, MOV, AVI, WebM, MKV, M4V)
5. Use the **Server Import** tab to scan and bulk-import files already stored on the server

Generating Images with AI

1. Click **AI Generate** (magic wand icon)
2. Choose a provider: **DALL-E 3** (higher quality, HD option) or **Gemini** (faster, more aspect ratio choices)
3. Select a site, enter a text description, and set size/quality options
4. Click **Generate Image** — the result is saved directly to your asset library, tagged as `ai-generated`

Finding Assets

- Use the **search bar** to find files by name, title, tags, or description
- Filter by **type** (images, videos, audio, documents), **site**, or **collection**
- Use **Group By → Collection** to browse collection overview cards — click any card to see its assets

Viewing & Editing an Asset

1. Click any asset to open its detail panel
2. View file info: filename, type, size, dimensions (or duration for videos), site, collections, uploader, date, and processing status
3. Edit the **filename** directly, or update metadata: title, alt text, description, tags, copyright, and usage rights
4. Expand **Raw EXIF / IPTC Data** to view full technical metadata extracted from a photo
5. Copy the asset's direct URL with the copy button
6. Click **Save Changes** to update, or **Delete** to remove the asset

Batch Actions

Select multiple assets using the checkboxes, then choose a batch action:

- **Delete Selected** — permanently removes the files
- **Add Tags** — apply tags to all selected assets at once (merges with existing tags)
- **Assign to Collection** — assign selected assets to a collection (create a new one inline if needed)

Tips

- Assets are available across Site Builder, Airmail campaigns, AirGallery, and AirCatalog — assign them to an entity at upload time to skip manual organization later
- Use consistent tags across your library to make search more effective
- Toggle the stats panel off to maximize screen space when browsing large libraries
- AI-generated images are automatically tagged with the provider name for easy filtering later

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Backup

Backup

The Smart Backup System lets you save and restore your platform's files and database at any point in time. Use it before making major changes or on a regular schedule to keep your data safe.

Key Features

- **Complete Backup**: Captures everything — all system files and the entire database — in one click.
- **Selective Backup**: Choose exactly what to back up: specific folders, individual pages and their assets, or selected database tables.
- **Backup History**: View all saved backups with their date, type, and size. Add notes to any backup for easy identification later.
- **Restore**: Roll back any files or database tables to a previous backup. You can choose to automatically create a safety backup before restoring.
- **Download**: Download any backup as a file to store off-server.
- **Send to AI Assistant**: Share a backup's contents directly with the AI Assistant for analysis or reference.

How to Use

Creating a Backup

1. Go to the **Backup** page from the sidebar.
2. Choose a backup type:
   - **Complete Backup** — backs up everything automatically.
   - **Selective Backup** — reveals options to choose specific components.
3. If using Selective, check the items you want to include:
   - **Core Files** — pick individual system folders to include.
   - **Pages** — select specific pages; expand each page to choose individual files (views, JS, CSS).
   - **Database** — pick tables and whether to back up their structure, data, or both.
4. Click **Create Backup**. A progress bar confirms the backup is running.

Viewing Backup Details

1. In the **Backup History** panel on the right, find the backup you want.
2. Click the **info icon** to open the Backup Information panel.
3. Browse tabs for File Structure, Database tables, and individual Files.
4. Add or edit a **comment** to label the backup, then click **Save Comment**.
5. Use **Copy Structure** to copy the file tree to your clipboard.

Restoring from a Backup

1. Click **Restore from Backup** at the top of the page (or the restore icon next to any backup in history).
2. Select a backup from the list on the left.
3. Choose which **files** and **database tables** to restore.
4. For database tables, decide whether to restore structure, data, or both.
5. Leave **Create backup before restore** checked to automatically save your current state first.
6. Click **Start Restore** and wait for the process to complete.

Downloading or Deleting a Backup

- Click the **download icon** to save a backup file to your computer.
- Click the **trash icon** to permanently delete a backup.

Tips

- Run a Complete Backup before any significant platform update or configuration change.
- Use comments to label what changed before or after each backup (e.g., "Before email redesign").
- When restoring, always keep the "Create backup before restore" option checked — it gives you a fallback if the restore doesn't go as expected.
- Backups are automatically retained for 30 days.
- Use **Send to AI Assistant** to share a backup's file structure with the AI for context when troubleshooting.

Billing & Plans

The Billing page lets you manage your subscription plan, AI credits, storage, add-ons, and payment methods — all in one place.

Key Features

- **Current Plan**: View your active plan — Economy, Premium Economy, Business Class, or First Class — with included limits for users, sites, storage, contacts, emails per month, and AI credits, plus your next billing date
- **AI Credits Gauge**: A circular indicator showing available, used, and total AI credits at a glance, with your auto-renew status shown below
- **Credit Packs**: Purchase additional AI credits at any time without changing your plan (available on paid plans)
- **Storage Packs**: Add more storage whenever you need it (available on paid plans)
- **Payment Method**: Add and manage credit cards securely via Stripe
- **Billing History**: Paginated log of all past charges, credit purchases, and billing events — filterable by Plans, Credits, or Storage — with downloadable invoices
- **Auto-Renew**: Automatically purchase AI credit or storage packs when supply drops below a threshold you set
- **Redeem Coupon**: Enter a coupon or gift code to unlock free credits, storage, or other benefits

How to Use

View Your Plan

Your current plan is shown at the top with its name, price, and included limits. Click **Change Plan** to see available options (Economy, Premium Economy, Business Class, and First Class). First Class plans are custom — contact support for a quote.

Buy AI Credits or Storage

1. Scroll to **Credit Packs** or **Storage Packs**
2. Select the pack that fits your needs
3. Click the purchase button — your card on file is charged immediately

Set Up Auto-Renew

1. Open the **Auto-Renew & Alerts** panel
2. Toggle on **AI Credits** or **Storage**
3. Choose which pack to auto-buy and set the threshold:
    - **AI Credits**: replenishes when credits drop below a set percentage (default 20%)
    - **Storage**: expands when usage rises above a set percentage (default 80%)
4. Click **Save Settings**

Email alerts are always sent at 80% (warning) and 95% (critical), regardless of auto-renew settings.

Add a Payment Method

1. Click **Add Card** in the Payment section
2. Enter your card details in the secure Stripe form and click **Save Card**

Your card number is never stored — all payment data is handled by Stripe.

View Billing History

Scroll to **Billing History** to see a complete log of charges and credit purchases. Use the filter to show only Plans, Credits, or Storage transactions. Click the invoice link on any row to download a PDF receipt.

Redeem a Coupon

1. Scroll to **Redeem Coupon** and enter your code (not case-sensitive)
2. Click **Redeem** — a preview of the benefits appears
3. Click **Confirm & Redeem** to apply them to your account

Tips

- Enable auto-renew to avoid running out of credits during a busy period
- A saved payment method is required before auto-renew can activate
- The **Billing History** filter helps you quickly find a specific type of transaction
- Coupon codes always show a preview of their benefits before you confirm — review carefully before clicking **Confirm & Redeem**

Booking Settings

Booking Settings

Configure how clients book appointments with you — set your available hours, define appointment types, and share your personal booking link.

Key Features

- **Availability Schedule**: Define which days and hours you are open for bookings. Clients only see time slots that fall within your schedule.
- **Appointment Types**: Set default durations and buffer times for each type of meeting (Consultation, Site Visit, Meeting, Call, Demo, Follow-up).
- **Bookable Toggle**: Enable or disable specific appointment types so only relevant ones appear for clients.
- **General Settings**: Control daily booking limits, how far in advance clients must book, and how many days ahead they can schedule.
- **Timezone**: Set your timezone so availability is displayed correctly for you and your clients.
- **Booking Link**: A shareable link clients use to self-book an appointment directly on your calendar.

- **Weekly Preview**: A live summary showing which days are open or unavailable as you edit your schedule.

How to Use

Set Your Availability

1. Go to **Booking Settings** in the sidebar.
2. In the **Availability Schedule** section, each row represents a time block for a day of the week.
3. Select the **day**, then set the **start** and **end times** for that block.
4. Toggle the switch on each row to enable or disable that time block without deleting it.
5. Click **Add Time Slot** to add additional blocks (useful for split schedules like morning and afternoon).
6. Click the trash icon to remove a time slot.
7. Click **Save Changes** when done.

Configure Appointment Types

1. In the **Appointment Types** table, find the type you want to adjust.
2. Set the **Duration** (in minutes) for how long that appointment lasts.
3. Set the **Buffer** (in minutes) for the gap left after that appointment before the next one.
4. Check or uncheck **Bookable** to control whether clients can request that type.

Update General Settings

1. In the **General Settings** panel on the right, set:
    - **Max Bookings Per Day** — the maximum number of appointments you accept daily.
    - **Minimum Advance Notice** — how many hours ahead a client must book.
    - **Max Days in Advance** — how far into the future clients can schedule.
    - **Timezone** — your local timezone for accurate scheduling.

Share Your Booking Link

1. Copy the link shown in the **Booking Link** panel using the copy button.
2. Share it via email, your website, or social media.
3. Click **Preview Booking Page** to see what clients will see before sharing.

Tips

- Use buffer times to give yourself a break between back-to-back appointments.
- Set a minimum advance notice (e.g., 24 hours) to avoid last-minute bookings.
- The Weekly Preview updates live as you make changes — use it to confirm your schedule looks right before saving.
- You can add multiple time blocks for the same day if you take a midday break.

Budgets

Budgets

Get a complete financial overview of all your projects in one place — budgets, expenses, revenue, and profit and loss at a glance.

Key Features

- **KPI Summary Cards**: See your total annual budgets, total amount spent, total revenue collected, and overall profit & loss at the top of the page. The P&L value and icon turn green when positive and red when negative.
- **Monthly Objectives Grid**: Set company-wide monthly spending and revenue targets for any year, side by side with actual figures. Four rows span each month: budget target, actual expenses (with % of target), revenue target, and actual revenue (with % of target). Edit any target cell directly — changes save automatically after a moment.
- **Monthly Trend Chart**: A 12-month bar chart comparing expenses vs. revenue so you can spot seasonal patterns at a glance.
- **Expense Breakdown**: A visual breakdown of spending by category (Equipment, Labor, Venue, Travel, Materials, Subcontractor, Software, Insurance, Marketing, Other) showing each category's share of total costs.
- **Revenue per Year**: A horizontal bar chart showing realized revenue for each calendar year across your full history, with the current year highlighted.
- **Project Budgets Table**: A sortable table listing every project with its account, annual budget, total spent, percentage used (with a progress bar), revenue target, actual revenue, and P&L. Each project shows a status badge: **Under**, **On Target**, or **Over** budget.

- **Recent Expenses**: The 10 most recent expenses across all projects, with category, date, and amount.
- **Add Expense**: Log a new expense against any project directly from this page.
- **Export**: Download the full project budget table as a CSV file.

How to Use

Reading the dashboard

1. Open **Budgets** from the sidebar.
2. The four KPI cards at the top give you an instant snapshot — total budgets allocated, money spent, revenue earned, and net P&L.
3. Scroll down to see charts and the full project table.

Setting monthly objectives

1. Find the **Monthly Objectives** section.
2. Use the arrow buttons to navigate between years.
3. The grid shows four rows for each month: budget target, actual expenses, revenue target, and actual revenue. Actual rows display a percentage vs. your target when both values exist. The annual total appears on the right.
4. Click any budget or revenue target cell and type a new amount. The annual total updates instantly and your changes save automatically.

Logging an expense

1. Click **Add Expense** in the top-right corner.
2. Select the project, enter a description, amount, and date.
3. Choose a category (Equipment, Labor, Venue, Travel, Materials, Subcontractor, Software, Insurance, Marketing, or Other) and type (Direct Expense, Vendor Bill, or Resource Cost).
4. Add optional notes and check **Billable to client** if the cost will be passed on.
5. Click **Save Expense**.

Viewing project details

- Click any row in the Project Budgets table to open that project's detail page.

Exporting data

- Click **Export** in the top-right corner to download a CSV with all project budget figures.

Tips

- Budget status thresholds: **Under** means spending is at or below 90% of budget; **On Target** is 90–110%; **Over** (red) means spending has exceeded 110% — use Monthly Objectives to catch overruns early.
- The P&L column reflects paid invoices only, so it updates as payments are recorded on your invoices.
- Expenses marked as billable are tracked per project and can be referenced when invoicing the client.
- Use the search box above the project table to quickly find a specific project by name or account.
- The Monthly Objectives grid is company-wide, not per-project — use it to plan your overall annual targets.
- The Revenue per Year chart lets you compare performance across multiple years at a glance.

Business Setup

Business Setup

A guided three-step wizard that connects your domain, email, and payment processing so your business is ready to go.

Key Features

- **Progress Tracker**: A visual progress bar shows how many of the three steps you've completed at a glance. An "All Set!" badge appears when everything is done.
- **Domain Connection**: Link your own domain name to your account with DNS verification and automatic SSL certificate setup via Cloudflare.
- **Email Sending**: Enable outbound email from your domain so messages to clients come from your business address, verified through Amazon SES.
- **Stripe Payments**: Connect your Stripe account to accept payments directly from clients. Can be set up at any time, independently of the other steps.
- **Auto-refresh**: The page automatically checks pending steps (like DNS propagation or email verification) every 30 seconds so you don't have to keep refreshing manually.

How to Use

Step 1: Connect Your Domain

1. Enter your domain name (e.g. `yourbusiness.com`) in the Domain field. If you've set it up before, it will be pre-filled.
2. Click **Check DNS** to verify it's pointing to the server.
3. If DNS isn't set up yet, the page shows the A record details to add at your domain registrar. DNS changes can take up to 48 hours to propagate. You can check again at any time.
4. Once DNS is verified, click **Add to Cloudflare** and then **Provision SSL** to secure your domain.

Step 2: Set Up Email

1. This step unlocks automatically after your domain is connected.
2. Click **Set Up Email Sending** to begin verification.
3. The system adds the required DNS records and verifies your domain with Amazon SES automatically.
4. The page displays live status for Domain Verification and DKIM while it completes.

Step 3: Connect Payments

1. Click **Connect Stripe** to start the Stripe onboarding process. This step can be started at any time, independently of the other steps.
2. You'll be redirected to Stripe to set up your account.
3. Once complete, you're returned to Business Setup where the page confirms charges and payouts are enabled.
4. If onboarding isn't finished, click **Continue Stripe Onboarding** to return to Stripe and complete the process.

Tips

- You must be a company owner or admin to access Business Setup.
- Email setup is locked until the domain step is finished, but payments can be connected at any time.
- If DNS is taking time, leave the page open. It polls automatically every 30 seconds and updates the status when the domain resolves.
- After returning from Stripe, the page refreshes automatically — wait a moment before assuming something went wrong.

CRM — Customer Relationship Management

Pilot's CRM is a comprehensive customer relationship management system. It helps you manage contacts, track deals, create quotes and invoices, schedule appointments, and automate workflows.

CRM Modules:

- CRM Dashboard: Overview of your sales pipeline, recent activities, and key metrics
- Contacts: Manage all your contacts with tags, notes, and communication history
- Accounts: Group contacts into company accounts for B2B relationship management
- Pipeline: Visual kanban board to track deals through your sales stages
- Projects: Manage projects and events linked to contacts or accounts
- Activities: Log calls, meetings, emails, and tasks. Track all interactions with contacts
- AI Agent: AI-powered conversation assistant for CRM workflows
- Integrations: Connect CRM with external services
- Webhooks: Set up automated webhooks triggered by CRM events
- Workflows: Automate repetitive CRM tasks with rule-based workflows
- Reports: Generate reports on sales, contacts, and pipeline performance

The CRM integrates with all other Pilot modules — Airmail for email marketing, AirForms for lead capture, AirChat for customer support conversations, and the invoicing system for billing.

Access: Most CRM features are available to CRM client users with admin level. Some advanced features (AI Agent, Integrations, Webhooks, Workflows, Reports) require uber admin access.

Calendar

Calendar

Schedule and manage appointments with your clients, contacts, and projects — all in one place.

Key Features

- **Three Calendar Views**: Switch between Month, Week, and Day views to see your schedule at a glance or in detail.
- **Appointment Types**: Categorize appointments as Consultations, Site Visits, Meetings, Calls, Demos, Follow-ups, or Custom events.
- **Status Tracking**: Mark appointments as Scheduled, Confirmed, Completed, Cancelled, or No Show.
- **All Day Events**: Check "All Day Event" to create a full-day appointment without a specific time.
- **CRM Links**: Connect each appointment to an Account, Contact, and/or Project for full context.
- **Location Options**: Choose In Person (with address), Phone, Video Call, Google Meet, or Zoom — the form adapts to show the right fields.
- **Google Meet Auto-Link**: Selecting Google Meet automatically generates a meeting link when you save.
- **Zoom Integration**: Selecting Zoom automatically creates a Zoom meeting via your connected Zoom account.
- **Google Calendar Sync**: Appointments sync two-ways with Google Calendar — changes in either place stay in sync.
- **Color Labels**: Assign one of 8 colors to any appointment for quick visual identification on the calendar.
- **Reminders**: Set a reminder 15 minutes, 30 minutes, 1 hour, or 1 day before the appointment.
- **Project Timelines**: Active project date ranges appear as color-coded spanning bars across calendar weeks. Click any bar to jump directly to that project.
- **Project Events**: Project milestones appear on the calendar as distinct items, color-coded separately. Clicking them opens the related project.
- **Online Booking**: Share a public booking link so clients can self-schedule based on your availability rules.

How to Use

Viewing Your Calendar

1. Open the **Calendar** page from the sidebar.
2. Use the **Month / Week / Day** buttons to switch views.

3. Click the arrow buttons to move forward or backward in time, or click **Today** to return to the current date.
4. In Month view, click **+X more** on any day to switch to Day view and see all events for that date.

Creating an Appointment

1. Click **New Appointment** — or click a day cell (Month view) or a time slot (Week/Day view) to pre-fill the date and time.
2. Fill in the title, type, status, and start/end times. Check **All Day Event** if no specific time is needed.
3. Optionally add a description and internal notes.
4. Link the appointment to an Account, Contact, or Project.
5. Choose a location type. Selecting **Google Meet** or **Zoom** will automatically create a meeting link when you save.
6. Pick a color and set a reminder if desired.
7. Click **Save Appointment**.

Editing an Appointment

Click any appointment on the calendar to open it, update the details, and click **Save Appointment**.

Online Booking

Share your public booking link with clients so they can self-schedule. Availability rules (hours, appointment duration, and buffer time between bookings) control when clients can book.

Tips

- Use the **Week** or **Day** view to see exact appointment times side by side.
- Project timeline bars span across days automatically — click one to jump straight to that project.
- Project milestones appear as distinct items and also link back to their project.
- Linking appointments to Accounts and Contacts keeps your CRM activity log up to date.
- Click any empty time slot in Week or Day view to create an appointment already set to that time.
- Connect Google Calendar in **Integrations** settings to keep your schedule synced across both platforms.

Calendar, Appointments & Booking

Pilot's CRM includes calendar management, appointment scheduling, and a booking system for client-facing availability.

Calendar:

- Visual calendar with day, week, and month views
- Create events, meetings, and reminders
- Link calendar events to contacts, accounts, or projects
- Color-coded event types for easy visual organization

Appointments:

- Manage scheduled appointments with clients
- Track appointment status: scheduled, confirmed, completed, cancelled, no-show
- Link appointments to contacts and add notes

Booking Settings:

- Configure your availability for online booking
- Set business hours, appointment durations, and buffer times
- Define booking rules and restrictions
- Generate a public booking page where clients can schedule appointments

Resources:

- Manage shared resources like meeting rooms, equipment, or staff
- Assign resources to appointments and events
- Track resource availability and prevent double-booking

Access: Calendar is available to CRM client users. Appointments, Booking Settings, and Resources require uber admin access.

Campaigns

Campaigns

Create, schedule, and send email campaigns to your subscribers. Track opens, clicks, and performance in one place.

Key Features

- **Dashboard Stats**: See total campaigns, how many were sent this month, your average open rate, and how many are scheduled at a glance.
- **Campaign Types**: Organize campaigns by type — Newsletter, Announcement, Welcome Series, Promotion, or Transactional.
- **Flexible Recipients**: Send to all active subscribers, specific subscriber lists, or filter by tags.
- **Personalization**: Insert merge tags — `{{first_name}}`, `{{last_name}}`, `{{email}}`, `{{company}}`, `{{unsubscribe_link}}`, and `{{view_browser_link}}` — into subject lines and content. Use the **Merge Tags** button in the editor toolbar to insert them quickly.
- **Multi-channel Delivery**: Send via email, SMS, or both. SMS messages include a link to the full email and support personalization tags (up to 300 characters).
- **AI Newsletter Generator**: Describe your topic, pick a tone and length, and let AI draft a complete newsletter — including subject line, preview text, and formatted content. Review and edit everything before applying. Uses 10 credits per generation.
- **Email Templates**: Start from a built-in layout — Basic Newsletter, Announcement, or Welcome Email — via the **Templates** button in the editor toolbar.
- **Media Assets**: Insert images from your media library directly into the email editor.
- **Content Tabs**: Switch between the visual HTML editor, plain text version, raw source code, and preview — all in one place.
- **Preview Modes**: Preview your campaign in desktop or mobile view before sending.
- **Test Emails**: Send a test to one or more addresses to review the email in a real inbox.
- **Performance Stats**: After sending, view opens, clicks, and other engagement metrics for each campaign.

How to Use

Create a Campaign

1. Click **Create Campaign** in the top right.

2. Select a site, enter a campaign name, and choose the type.
3. Write your subject line — use `{{first_name}}` to personalize it.
4. Optionally add preview text (the short line shown after the subject in email clients).
5. Choose a delivery channel: Email, SMS, or both.
6. Select your recipients: all subscribers, specific lists, or by tags.
7. Write your content in the HTML editor. Use **AI Newsletter** to generate content automatically, or **Media Assets** to insert images.
8. Check the **Preview** tab to see how it looks on desktop and mobile.
9. Send a test email to review it in your inbox.
10. Choose to **Send Immediately**, **Schedule for Later**, or **Save as Draft**.
11. Click **Save Campaign**.

Use the AI Newsletter Generator

1. Click **AI Newsletter** in the editor toolbar.
2. Describe what your newsletter is about.
3. Optionally add keywords, then choose a tone (Professional, Casual, Creative, Funny, or Persuasive) and length.
4. Click **Generate Newsletter** — generation takes 15–30 seconds.
5. Review and edit the generated subject line, campaign name, and preview text.
6. Click **Apply All & Close** to fill in the campaign form, or **Regenerate** to try again.

Send or Schedule a Campaign

- Campaigns in **Draft** or **Scheduled** status can be edited or sent.
- Click **Send** on any draft to open a confirmation — review the recipient count, check the confirmation box, and click **Send Campaign**.
- Active campaigns can be **paused** and resumed later.
- To reschedule, edit the campaign and update the scheduled date and time.

View Campaign Stats

- After a campaign is sent, click **Stats** to view open rates, click rates, and delivery details.

Manage Campaigns

- Use the **search bar** to find campaigns by name or subject.
- Filter by site, status, type, or date range using the filter dropdowns.

- Select multiple campaigns to **Duplicate** or **Delete** them in bulk.

Tips

- Save early as a draft while you work — you can always come back to edit before sending.
- Always send a test email before sending to your full list.
- Use the AI Newsletter Generator when you need a quick starting point — you can edit all generated details before applying.
- Preview text significantly affects open rates — always fill it in.
- SMS delivery requires subscribers to have a phone number on file.

Catalogs

Catalogs

Catalogs are the top-level organizational containers in your Digital Asset Manager (DAM). They group related stories and assets together, making it easy to browse and manage your media library by topic, project, or publication.

Key Features

- **Catalog List**: See all catalogs for the selected DAM site at a glance, with a live count of stories and assets in each
- **Type Indicator**: Each catalog is tagged as either a photo or video catalog so you can quickly identify its media type
- **Collection Grouping**: Catalogs can belong to a collection, letting you organize catalogs into broader categories
- **Newsletter Settings**: Each catalog can have a dedicated newsletter sender address for email distribution
- **Story & Asset Counts**: The list shows exactly how many stories and total assets each catalog contains
- **View & Edit Actions**: Click View or Edit on any row to inspect or modify a catalog's details

How to Use

1. Select a DAM site from the site selector in the top bar — the catalog list loads automatically
2. Browse the list to see all catalogs, their types, story counts, and asset totals
3. Use the **View** button on any row to open the catalog's details
4. Use the **Edit** button to update a catalog's name, type, collection, or newsletter settings
5. To browse the stories inside a catalog, go to the **Stories** page and use the "All Catalogs" filter to select a specific catalog

Tips

- A catalog with a high asset count but low story count may have stories with large photo sets — click into Stories to explore
- Catalogs tied to a collection appear with the collection name in the list, making it easy to see the broader grouping
- The newsletter "From" address shown in the catalog list is the sender used when distributing that catalog's content by email

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Claude Code Dashboard

Claude Code Dashboard

Browse, search, and interact with all Claude Code sessions across your development machines from one central view. Track AI development plans alongside session history.

Key Features

- **Sessions Tab**: See every Claude Code session with status, machine, project, model, message count, and estimated cost at a glance
- **Plans Tab**: Review and manage AI development plans with priority, status tracking, tags, and execution logs
- **Live Stats**: Summary cards show total sessions, sub-agent count, messages, tokens, estimated cost, data size, status breakdown, and days since your first session
- **Filtering**: Narrow the list by session status, machine (AWS Server or MacStudio), or AI model

(Opus, Sonnet, Haiku)

- **Search**: Find sessions by keyword — searches across summaries, project names, slugs, and session IDs
- **Session Detail**: Click any session to read the full conversation history, including tool use, token counts, and per-message cost breakdown
- **Live Chat**: Open a chat panel to start a new Claude Code session or resume an existing one with real-time streaming responses
- **Chat Attachments**: Attach files, platform source code, KB documents, or URLs as context before sending a message
- **Page Screenshots**: Capture a screenshot of any platform page directly from the dashboard

Session Statuses

- **Running** — session is currently active
- **Completed** — session ended cleanly
- **Stuck** — session went quiet without a clean exit
- **Archived** — session is older than 24 hours

Sessions marked **auto** were started by an automated process, not a person.

How to Use

Sessions

1. Open the **Claude Code Dashboard** from the sidebar menu
2. Stats cards load automatically — including total sub-agents spawned and days since your first session
3. Use filter dropdowns to narrow by status, machine, or model; type in the search box to find specific sessions
4. Click **View** on any row to open the full conversation history in a modal
5. Click **Chat** on any row (or **New Chat** at the top) to open the live chat panel
6. In the chat panel, select a model before sending; press **Enter** to send, **Shift+Enter** for a new line
7. Use the paperclip button to attach a file, source code, a KB doc, or a URL as context
8. Click **Stop** at any time to cancel a response still generating
9. Click **Screenshot** in the toolbar to capture a screenshot of any active page

Plans

1. Click the **Plans** tab — a badge shows how many plans are pending
2. Stats cards display total, pending, in progress, and completed plan counts
3. Filter plans by status or search by title, description, or tags
4. Click **View** on any plan to open its full description, priority, tags, and execution log
5. Change a plan's status (Pending, In Progress, Completed, Failed, or Cancelled) using the dropdown in the detail panel
6. Delete a plan using the **Delete** button in the detail panel or the trash icon on the row

Tips

- The **Est. Cost** column shows approximate API cost per session based on token usage
- Sessions from both AWS Server and MacStudio appear in the same list — look for the machine badge on each row
- When viewing a session, long messages are collapsed by default — click **Show full** to expand them
- Thinking steps are hidden by default in session detail — click the **thinking** badge to reveal them
- Attachments are sent as context with your next message and cleared automatically after sending
- Use **Refresh** in the toolbar to reload both stats and the session list with the latest data

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Clients

Clients

Your CRM home base — an at-a-glance view of every account, project, deal, and task across your business.

Key Features

- **KPI Summary Bar**: Six live counters at the top — Total Accounts, Active Clients, Prospects, Active Projects, Pipeline Value, and Total Revenue — so you always know where you stand.

- **Active Projects Timeline**: A visual Gantt-style chart showing all in-progress projects across their date ranges. Click any project bar to jump straight to the project detail.
- **Revenue Trend**: A 6-month bar chart of collected payments with a badge showing how this month compares to last month (e.g. +12% vs last month).
- **Pipeline Funnel**: A breakdown of your active deals by stage — Lead, Proposal, Contracted, In Progress, On Hold — with project counts and estimated values per stage.
- **Today's Appointments**: All appointments scheduled for today, listed by time.
- **Quote Win Rate**: A 90-day scorecard showing how many quotes were accepted, declined, or are still pending, plus your overall win percentage.
- **This Week's Activity**: A running count of calls made, emails sent, meetings held, and tasks completed since Monday.
- **Upcoming Events**: Project-linked events happening in the next 14 days, with dates and venue info.
- **Recent Activity Feed**: A live stream of the last 15 actions across all accounts — calls, emails, notes, payments, status changes, and more.
- **Overdue Invoices**: An alert card (shown only when needed) listing past-due invoices with days overdue and total amount outstanding.
- **Tasks & Follow-ups**: Your pending calls, follow-ups, meetings, and tasks. Click the icon on any task to mark it complete without leaving the dashboard.
- **Budget Status**: For projects with monthly budgets or revenue targets, a progress bar shows whether you're under, on track, or over for the current month.
- **Expiring Contracts**: Contracts reaching their end date within 30 days appear here as a heads-up (hidden when none are expiring soon).
- **Recently Active Accounts**: The five accounts with the most recent activity, with type badge (client, prospect, lead) and total revenue.
- **Import Contacts**: Upload a CSV file to bulk-import contacts. Preview and map your columns before importing, with an option to update existing records matched by email address.

How to Use

1. Open **Clients** from the sidebar to see your full dashboard.
2. Check the **KPI bar** at the top for a quick health check of your accounts and pipeline.
3. Review the **Timeline** to see which projects are active and where they fall in the calendar.
4. Use the **Pipeline Funnel** to spot where deals are concentrated and click **View Board** to manage them.
5. Check **Tasks & Follow-ups** and click the task icon to complete items directly from the dashboard.

6. If the **Overdue Invoices** card appears, address those accounts promptly.
7. To add contacts in bulk, click **Import** in the top-right, upload your CSV, map the columns, and confirm.

Tips

- The dashboard updates automatically when you switch sites using the site selector in the top bar.
- Tasks completed here are reflected immediately across the CRM — no need to visit the activities page.
- Use the **Pipeline** and **Reports** buttons in the top-right to dive deeper into deal management and analytics.
- The Revenue Trend badge turns red when this month's revenue is below last month — a quick signal to focus on collections.
- Contracts expiring within 7 days show in red; 8–30 days show in amber.

Clients Dashboard

Clients Dashboard

Your central command center for managing clients, projects, revenue, and team activity — everything you need to run your business at a glance.

Key Features

- **KPI Stats Bar**: Live counts for total accounts, active clients, prospects, active projects, pipeline value, and total revenue collected.
- **Active Projects Timeline**: Visual timeline and list of up to 20 in-progress projects showing status, priority, client name, and key dates. Click any project to open its full detail view.
- **Revenue Trend Chart**: Bar chart of collected revenue over the past 6 months, with a badge showing how this month compares to last month.
- **Annual Revenue Chart**: Full-year revenue summary showing monthly totals for the current year at a glance.
- **Pipeline Funnel**: Breakdown of open projects by stage — Proposed, Contracted, Planning, In

Production, On Hold — with project counts and estimated values per stage.

- **Today's Appointments**: All appointments scheduled for today, shown with time and linked client.
- **Quote Win Rate (90 days)**: Track how many quotes were sent, accepted, and declined over the last 90 days, along with total accepted value.
- **This Week's Activity**: Summary of calls made, emails sent, meetings held, and tasks completed since Monday.
- **Upcoming Events**: Project events and milestones due in the next 14 days, sorted by date. Links to the full Calendar view.
- **Recent Activity Feed**: A live log of the latest 15 actions across all your accounts and projects — notes, calls, emails, status changes, and more.
- **Overdue Invoices**: An alert panel (shown only when needed) listing past-due invoices with the client name, amount, and due date.
- **Tasks & Follow-ups**: All pending tasks, follow-up reminders, scheduled calls, and meetings that still need attention.
- **Budget Status**: For projects with set budgets or revenue targets, see at a glance whether spending and income are on track, under, or over for the current month.
- **Expiring Contracts**: Active contracts expiring within 30 days, so you can renew or follow up in time.
- **Recently Active Accounts**: The 5 accounts with the most recent activity, for quick access.

How to Use

1. Open the Clients Dashboard from the main menu.
2. Review your KPI stats at the top — they update every time the page loads.
3. Scroll down to check your active projects and pipeline. Click any project row to see full details.
4. Check the **Overdue Invoices** panel if it appears — these need immediate attention.
5. Review **Tasks & Follow-ups** to see what actions are due.
6. Use the top-right buttons to jump directly to Accounts, Projects, Pipeline board, or Reports.

Importing Contacts

Click the **Import** button at the top right to bring contacts into the system from a CSV file.

1. Upload your CSV file.
2. Map each column to the correct contact field (name, email, phone, company, etc.).

3. Optionally enable **Update existing contacts** to avoid duplicates (matched by email).
4. Add tags to all imported contacts if needed.
5. Click **Import** to complete the process.

Tips

- The **Overdue Invoices** and **Expiring Contracts** panels only appear when there is something to show — a clean dashboard means you're up to date.
- Click **Pipeline** in the top bar to see your project pipeline as a drag-and-drop Kanban board.
- Click **Reports** for detailed revenue and performance breakdowns over custom date ranges.
- Click **Calendar** in the Upcoming Events panel to see all scheduled project events in a full calendar view.

Company Management

Company Management

A platform-level tool for creating and managing client companies, their members, subscription plans, and enabled modules.

Key Features

- **Company List**: Browse all companies with sortable columns for name, owner, plan, user count, site count, storage usage, modules, status, and creation date.
- **Search & Filter**: Search by company name or email, and filter by status (Active, Trial, Suspended, Cancelled) or subscription plan.
- **Add & Edit Companies**: Create new companies or update details including name, contact info, owner, status, plan, and modules.
- **Module Control**: Enable or disable individual product modules (CRM, DAM, Airmail, Airblog, Airforms) per company.
- **Member Management**: View all active members, add existing platform users, change their role, or remove them.
- **Email Invitations**: Invite people by email address. They receive a secure link valid for 7 days to join the company.

- **Sites View**: See all sites associated with a company and their current status.
- **Bulk Actions**: Select multiple companies to activate or suspend them all at once.

How to Use

Add a Company

1. Click **Add Company** in the top right.
2. Enter the company name, email, phone, and website.
3. Set the status and assign an owner.
4. Switch to the **Plan & Modules** tab to select a subscription plan and tick the modules to enable.
5. Click **Save**.

Edit a Company

1. Find the company in the list and click **Edit** in its row.
2. Update any details across the Details or Plan & Modules tabs.
3. Click **Save**.

Manage Members

1. Click **Members** on any company row.
2. To add an existing user: type their name or email in the search box, select them, choose a role, and click **Add**.
3. To invite someone new: enter their email under **Invite by Email**, choose a role (Admin, Editor, or User), and click **Invite**. They'll receive an email with an acceptance link.
4. To change a member's role: use the role dropdown next to their name.
5. To remove a member: click the **×** button on their row.

Manage Pending Invitations

Pending invitations appear below the member list. Click **Resend** to refresh the link and extend the expiry by 7 days, or **Cancel** to revoke the invitation.

View Company Sites

Click **Sites** on any company row to see all sites belonging to that company and their status.

Change Company Status

- Click **Toggle Status** on a row to switch a company between Active and Suspended.
- Use the checkbox selection and **Activate Selected** or **Suspend Selected** to update multiple companies at once.

Delete a Company

Click **Delete** on any company row. This permanently removes the company and all its stored files. This action cannot be undone.

Member Roles

Role	Description
Owner	Full control; cannot be removed
Admin	Can manage members and invitations
Editor	Can create and edit content
User	Standard access

Tips

- Storage usage is shown as a progress bar — it turns orange above 75% and red above 90%.
- The company owner is automatically added as a member when a company is created.
- Invitations expire after 7 days. Use **Resend** to issue a fresh link with a new 7-day expiry.
- Email invitations can only assign Admin, Editor, or User roles. To assign Owner, add an existing platform user directly via the search field.
- The primary company (Air4.media LLC) cannot be deleted.

Company Settings

Company Settings

Manage your company profile, invite team members, and control who has access to your account. Only company owners and admins can access this page.

Key Features

- **Company Profile**: Update your company's name, contact email, phone, and website
- **Current Plan**: View your active subscription plan at a glance
- **Team Members**: See all active members and their roles — owners can change roles or remove members
- **Invitations**: Owners and admins can send email invitations to new members and track their status

How to Use

Update Your Company Profile

1. Open the **Profile** tab (shown by default)
2. Edit your company name, email, phone, and website
3. Click **Save Changes**

Your current subscription plan is displayed below the form for reference.

Manage Team Members

1. Click the **Members** tab
2. The list shows each member's name, email, role, and join date
3. As an owner, use the role dropdown next to any non-owner member to change their role
4. Click the **×** button to remove a member from the company

> Only owners can change roles or remove members. Admins can view the member list and send invitations, but cannot modify or remove members.

> Owners cannot be removed. To remove an owner, another owner must first change their role.

Invite a New Member

1. Click the **Invitations** tab
2. Click **Invite Member**
3. Enter the person's email address and select a role:
   - **User** — Basic access to the platform

   - **Editor** — Can manage content
   - **Admin** — Can manage members and company settings
4. Click **Send Invitation**

The person receives an email with a link to accept the invitation. The link expires after **7 days**.

Manage Pending Invitations

On the **Invitations** tab you can see all invitations with their status:

- **Pending** — Waiting for the recipient to accept
- **Accepted** — Successfully joined
- **Expired** — Link expired after 7 days
- **Cancelled** — Manually cancelled

For pending invitations, click the resend icon to send a fresh link with a new 7-day expiry, or the **×** button to cancel. The table also shows who sent the invitation and how many times it has been resent.

Tips

- A person must have an Air4.media account to accept an invitation — if they don't, they'll be prompted to create one when they click the link
- Invitations are tied to the email address you enter, so the recipient must log in with that same email
- You cannot remove yourself if you are the only owner — assign another owner first
- Resending an invitation generates a fresh link and resets the expiry to 7 days from the resend date
- If a pending invitation already exists for an email, use **Resend** instead of creating a new one

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Contacts

Contacts

Manage your CRM contact list — add, edit, search, and organize people and businesses in one place.

Key Features

- **Contact List**: View all contacts in a sortable, paginated table showing name (with avatar initials), email, phone/mobile, tags, and date added
- **Search**: Find contacts instantly by name, email, company, or notes
- **Tags**: Organize contacts with custom tags and filter the list by tag
- **Add & Edit**: Create or update contacts using a simple form
- **Bulk Delete**: Select multiple contacts and delete them all at once
- **Quick Email**: Click the email button on any contact with an address to open your mail client
- **CSV Import**: Upload a spreadsheet to import contacts in bulk

How to Use

Adding a Contact

1. Click **Add Contact** in the top-right corner
2. Enter the contact's first and last name (required)
3. Fill in any additional details — email, mobile, phone, company, job title, address, city, state, ZIP, or notes
4. Add tags by typing a tag name and pressing **Enter** or clicking the **+** button, or click any tag shown under "Popular tags"
5. Click **Save Contact**

Editing a Contact

1. Find the contact in the list
2. Click the **Edit** button on their row
3. Update any fields in the form
4. Click **Save Contact**

Searching and Filtering

- Type in the search box to find contacts by name, email, company, or notes

- Use the **Tags** dropdown to filter to contacts with a specific tag (shows usage count per tag)
- Click any column header to sort the list

Deleting Contacts

- To delete one contact, click the **Delete** button on their row and confirm
- To delete multiple contacts, check the boxes next to each one, then choose **Delete Selected**

Importing from CSV

1. Use the import option to upload a CSV file with a header row
2. Review the column mapping — the system auto-detects common column names
3. Optionally enable **Update existing contacts** to merge data for contacts already in the system (matched by email)
4. Optionally assign default tags to apply to all imported contacts
5. Confirm to run the import — a summary shows how many were imported, updated, skipped, or had errors

Tips

- Tags are great for segmenting your list — use them for status (e.g., "lead", "client"), campaigns, or source
- Your top 10 most-used tags appear automatically as "Popular tags" when adding or editing a contact
- Contacts are shared across your company — all team members see and manage the same contact list
- CSV files support common column name variations (e.g., `telephone`, `organisation`, `postcode`, `full_name`, `department`) and the system recognizes them automatically
- When importing, existing contacts matched by email can be updated rather than skipped — use the update option to keep your data in sync

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Contacts Management

The Contacts page is your central hub for managing all customer and lead information in Pilot's CRM.

Features:

- Contact Records: Store contact details including name, email, phone, company, address, and custom fields
- Tags: Organize contacts with color-coded tags stored as JSON arrays. Filter contacts by tag for targeted actions
- Notes: Add notes to contact records to track important details and conversation history
- Search & Filter: Search contacts by name, email, company, or tags. Advanced filters for status, source, and date range
- Import/Export: Bulk import contacts from CSV files or export your contact list
- Contact Sources: Contacts can be created manually, from AirChat email captures, AirForms submissions, or Airmail subscriber imports
- Activity History: View all interactions and activities linked to each contact

Contacts integrate with:

- Airmail: Sync contacts as email subscribers
- AirChat: Visitor emails captured during chat sessions create contacts automatically with an "airchat" tag
- AirForms: Form submissions can auto-create contacts
- Quotes & Invoices: Link contacts to financial documents

Access: Available to CRM client users and above.

Contracts

Contracts

Create, send, and sign business contracts — all in one place. Manage the full contract lifecycle from draft to completion, with built-in digital signatures and invoice generation.

Key Features

- **Contract Editor**: Full-screen editor with three panels — contract details on the left, HTML content in the center, and signatures on the right

- **Contract Types**: Contracts appear in the list as Contract, Questionnaire, Subcontract, Lead Form, or Proposal — filter by type to find what you need
- **Templates**: Save and reuse contract templates (General, NDA, Service Agreement, SOW, Rental, Event) with dynamic variables that auto-fill with contract details
- **Digital Signatures**: Both you and your client can sign directly in the browser using a signature pad
- **Status Tracking**: Track every contract through its lifecycle — Draft, Sent, Signed, Active, Completed, Void, or Expired
- **PDF Download**: Download a PDF copy of any contract that has been generated
- **Invoice Generation**: Convert a signed or active contract into an invoice with one click
- **Account & Project Linking**: Associate contracts with accounts, projects, and contacts for full CRM context

How to Use

Create a Contract

1. Click **New Contract** in the top bar
2. Enter a title and select the account — a contract number is assigned automatically (e.g., CTR-2026-0001)
3. Optionally link a project and contact
4. Set start and end dates and a total value
5. Add internal notes (visible only to you)
6. Write the contract body in HTML, or select a template to auto-fill the content
7. Click **Save Contract** to save as a draft

Use Templates

1. Click **Templates** to manage your saved templates
2. Create a template using HTML and placeholder variables that auto-replace when applied:
    - `{{account_name}}`, `{{contact_name}}`, `{{contract_number}}`, `{{contract_title}}`, `{{total_value}}`, `{{start_date}}`, `{{end_date}}`, `{{today}}`, `{{year}}`
3. When editing a contract, select a template from the dropdown and click **Apply Template** to replace the contract body

Send to a Client

1. Open a draft contract and review the content

2. Click **Send to Client** in the footer — the contract saves automatically and the status changes to **Sent**

Sign a Contract

1. Open a contract and go to the **Signatures** panel on the right
2. Draw your signature on the Provider pad, enter your printed name, and click **Sign as Provider**
3. To record the client's signature, draw it on the Client pad and click **Record Client Signature**
4. Once both parties have signed, the status updates to **Signed** automatically

Generate an Invoice

1. From the list, click **Generate Invoice** in the row actions of a signed or active contract
2. An invoice is created and linked to the contract — you'll be prompted to open it immediately

Download a PDF

- Click **PDF** in the contract editor header, or use the **Download PDF** row action in the list (only available when a PDF has been generated)

Void a Contract

1. Open any sent, signed, or active contract
2. Click **Void** in the footer — the contract is cancelled and marked as Void

Tips

- Use the **Preview** toggle in the editor to see the formatted contract before sending; existing contracts open in Preview mode by default
- Filter the list by **Status** or **Type** to quickly find specific contracts
- Search by contract number, title, or account name; click any column header to sort
- Select multiple contracts with the checkboxes to delete them in bulk
- Send a contract directly from the list using the row **Send** action — no need to open the editor first
- Contracts created from a project page automatically pre-fill the account and project fields
- When both parties sign, any connected automations are triggered automatically
- Default system templates cannot be deleted — only custom templates you create can be

removed

Dashboard

Dashboard

The Dashboard is your home page in Pilot — an AI-powered command center giving you a live overview of your account, sites, activity, and plan usage at a glance.

Key Features

- **AI Greeting Banner**: A personalized greeting using your first name, today's date, and smart insight chips showing what needs attention — overdue invoices, active chats, failed emails, new contacts, and more. Each chip links directly to the relevant page.
- **Live Metrics Strip**: Five compact cards showing real-time counts for Sites, Storage, Active Chats, Emails Today, and Contacts — each with a secondary badge for added context (active site count, queued emails, contacts added this week, etc.).
- **Quick Actions**: Role-based shortcut cards for your most-used tools. Regular users see Site Builder, CRM, AirMail, Invoices, Assets, AirChat, AirForms, and Settings. Admin users see system management tools.
- **Pre-Flight Setup Card**: New accounts see a 3-step setup card for domain, email, and payments. Each step shows its current status and a "Continue Pre-Flight" button. The card disappears once all three steps are complete.
- **Usage Meters**: Color-coded progress bars for each plan allowance — emails, AI credits, storage, contacts, and SMS. Green below 75%, yellow at 75–90%, red above 90%. Displays your current plan name as a badge.
- **Usage Warning Banner**: Appears automatically when any metric reaches 80% or more of its limit. Turns red at 95%. Lists all affected metrics and includes a direct link to Billing.
- **AirChat Activity Widget**: Shows a live summary of your chat conversations — active, awaiting, and escalated chats — when the AirChat module is enabled on your account.
- **Feedback Leaderboard**: Displays a ranked summary of feedback scores across your sites when feedback data is available.
- **Sites List**: All your websites with URL, type, status, and storage usage. Supports sorting and search. Create new sites or manage existing ones directly from this panel.
- **Recent Activity**: A timeline of your last 15 account events — emails sent, campaigns

launched, file uploads, payments received, form submissions, and more — with time-ago timestamps.

- **Welcome Banner**: Shown to new accounts — displays your company name, a module-based setup checklist, and a "Take a tour" link. Can be dismissed once you're set up.
- **Guided Tour**: A step-by-step spotlight walkthrough of the platform's main sections. Progress is saved so you can resume where you left off.

How to Use

1. Open Pilot — the Dashboard loads automatically as your home page.
2. Check the **AI Greeting** insight chips for anything requiring immediate attention.
3. Glance at the **Live Metrics Strip** for a real-time snapshot of your account.
4. Use **Quick Actions** to jump directly to your most-used tools.
5. If the **Pre-Flight Setup** card is visible, click **Continue Pre-Flight** to finish configuring your account.
6. Monitor the **Usage Meters** — if a warning banner appears, click **Manage in Billing** to review or upgrade your plan.
7. Scroll down to **Sites** to open, manage, or create websites.
8. Check **Recent Activity** for a log of the latest actions on your account.

Tips

- Insight chips in the greeting banner are clickable — they take you straight to the page where you can act on the issue.
- Usage bars change color as usage climbs — green is fine, yellow means plan ahead, red means act now.
- The welcome banner can be dismissed and won't reappear once closed.
- Click **Take a tour** in the welcome banner for a guided spotlight walkthrough of the platform.
- Admin users see additional system management shortcuts and service health alerts in the Quick Actions grid.

Design

Design

Customize the look and feel of your public DAM portal — colors, branding, typography, and layout — with a live preview that updates as you make changes.

Key Features

- **Theme Presets**: Start from a curated set of ready-made themes. One preset ("Match Site") automatically inherits your main site's brand colors.
- **Branding**: Set your portal name, upload a logo, add a watermark (applied to downloaded assets), and choose a font.
- **Colors**: Fine-tune every color in the portal — primary, accent, backgrounds, text, and status colors — using a color picker or by typing a hex value.
- **Layout**: Adjust card corner rounding, grid spacing, and border visibility with simple sliders.
- **Custom CSS**: Add CSS overrides for advanced styling beyond the built-in controls.
- **Live Preview**: See your changes instantly in a split-screen preview. Switch between desktop, tablet, and mobile views without leaving the page.

How to Use

1. Select your DAM site from the topbar — the editor loads that site's current design.
2. Click a **Theme Preset** card to apply a starting point. Your logo and watermark are preserved when switching presets.
3. Expand the **Branding** section to set a portal name, upload a logo (PNG or SVG, max 5MB), and upload a watermark image.
4. Expand **Colors** to adjust individual colors. Use the color swatch or type a hex code directly.
5. Expand **Layout** to slide card radius, grid gap, and border opacity to your liking.
6. For advanced needs, expand **Advanced** and enter custom CSS in the text area.
7. Watch the live preview on the right update in real time. Toggle device size (desktop / tablet / mobile) to check responsiveness.
8. Click **Save** when satisfied. Click **Reset** to revert to the active preset's defaults.

Tips

- Use a PNG or SVG with a transparent background for the best logo result.
- The watermark image is stamped on assets when clients download them — keep it subtle.
- "Match Site" is a great starting point if your portal should feel like an extension of your main

website.
- The preview refreshes automatically as you edit; use the refresh button if it ever appears out of sync.
- Unsaved changes are tracked — the Save button activates only when you have pending edits.

Documentation

Documentation

The Flight Manual is a public help center where you can browse guides, feature overviews, and how-to articles for the Pilot platform — no login required.

Key Features

- **Category Browser**: Articles are organized into eight sections — *Getting Started*, *Features & Tools*, *CRM & Contacts*, *Marketing*, *Media & Assets*, *Billing & Invoicing*, *AI & Automation*, and *Website & Design*.
- **Search**: Type any keyword into the search bar to instantly find relevant articles across all categories.
- **Table of Contents**: When reading an article, a sidebar automatically lists all the sections on that page so you can jump directly to what you need.
- **Article Navigation**: Previous and Next buttons at the bottom of each article let you step through the documentation in order.
- **PDF Downloads**: Download any individual article as a PDF, or grab the complete documentation set as a single PDF with a table of contents.
- **Direct Links**: Every article has a unique URL you can bookmark or share — the link works without logging in.

How to Use

1. Open the Documentation page — no sign-in needed.
2. Browse articles by category on the main page.
3. Click any article title to open it.

4. Inside an article, use the **On this page** sidebar to jump to a specific section.
5. To find something specific, type a keyword into the **Search documentation** bar on the main page.
6. To save an article for offline reading, click **Download PDF** inside the article.
7. To download the full documentation library, click **Download PDF** on the main documentation page.

Tips

- Use the search bar to quickly locate answers without browsing manually.
- The full PDF download includes a table of contents — useful for printing or sharing with your team.
- You can share a direct link to any article by copying the URL after opening it — no login required.
- Use the Previous / Next links at the bottom of articles to read through a category in sequence.

Domain Manager

Domain Manager

Manage all your domains and DNS records in one place, with live connections to both GoDaddy and Cloudflare.

Key Features

- **Domain Overview**: See all your domains at a glance with real-time stats — total count, breakdown by provider, and a count of domains expiring within 90 days
- **DNS Management**: View and edit DNS records directly from the platform without logging into GoDaddy or Cloudflare separately
- **Domain Search**: Check if a domain name is available and purchase it through GoDaddy without leaving the platform
- **Quick DNS Templates**: Apply pre-built record sets (hosting, email, verification) to a domain in one click

- **Site Linking**: Connect a domain to one of your Airmail sites for easy reference
- **Dual Provider Support**: Works with both GoDaddy-registered domains and Cloudflare-managed zones

How to Use

Syncing Your Domains

1. Click **Sync Domains** at the top right to pull in all domains from your connected providers
2. The stats row updates automatically showing totals per provider and any expiring soon
3. Domains expiring within 30 days are highlighted in red; within 90 days in yellow

Managing a Domain

1. In the **Domains** tab, find the domain you want to update
2. Click the edit icon to open the domain details panel
3. You can link the domain to a site or add notes — registrar info, expiry, and nameservers are read-only and come directly from the provider
4. Click **Save** to apply changes
5. Use the external link icon to jump directly to that domain's management page on GoDaddy or Cloudflare

Managing DNS Records

1. Click the **DNS Manager** tab
2. Select a domain from the dropdown — records load automatically
3. Click **Add Record** to create a new DNS entry (A, AAAA, CNAME, MX, TXT, NS, SRV, CAA)
4. Click the edit or delete icon next to any record to modify or remove it
5. For Cloudflare domains, you can toggle whether A, AAAA, and CNAME records are proxied through Cloudflare
6. Click **Refresh** to pull the latest records fresh from the provider

Using DNS Quick Templates

1. Select a domain in the DNS Manager tab
2. Quick action buttons appear below the domain selector (Hosting, Email, Verification, etc.)
3. Click a template to add its records — existing records are not removed
4. Confirm the prompt and the records are added immediately

Searching and Buying a Domain

1. Click the **Domain Search** tab
2. Type a domain name, choose a TLD (.com, .net, .org, .io, .ai, .dev, etc.), and click **Check**
3. If available, the price is shown and you can click **Purchase**
4. Fill in the registrant contact details (or click **Load Saved** to use your saved contact)
5. Choose a registration period (1–5 years), accept any required agreements, and confirm the purchase
6. The domain appears in your list after the next sync

Connecting Your Providers

1. Click the **Settings** tab
2. Enter your GoDaddy API Key and Secret (optional: reseller keys for purchases), then click **Test Connection**
3. Enter your Cloudflare API Token (create one with "Edit zone DNS" permissions in your Cloudflare dashboard), then click **Test Connection**
4. Click **Save Settings** — connections are now active for syncing and DNS edits

Tips

- Run **Sync Domains** after purchasing a new domain so it appears in the list right away
- The expiring-soon counter on the dashboard is a quick reminder to check renewals before they lapse
- Cloudflare's proxy toggle (orange cloud icon) routes traffic through Cloudflare's network — use DNS-only mode when you need the real IP to reach your server directly
- You can navigate straight from a domain row in the Domains tab to its DNS records by clicking the DNS icon — it switches to the DNS Manager tab with that domain pre-selected

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Downloads

Downloads

Track every file downloaded from your DAM site — who downloaded it, when, at what resolution, and which story it came from.

Key Features

- **Download Log**: A full chronological record of all asset downloads across your site.
- **User & IP Tracking**: See exactly which user account triggered each download and the IP address it came from.
- **Resolution Filter**: Filter downloads by resolution type — Full, Web, View, or High — to understand how assets are being used.
- **User & Group Filters**: Narrow the list to a specific user account or an entire user group.
- **Date Range Filter**: Set a From and To date to focus on a specific time period.
- **Story Reference**: Each download entry links back to the story the asset belongs to, giving context at a glance.
- **Search**: Quickly find downloads by username, IP address, or zip file name.
- **Sortable Columns**: Sort by date, user, asset, resolution, or IP to find patterns in usage.
- **Export to CSV**: Download your filtered results as a CSV file for reporting or analysis.

How to Use

1. Select your DAM site from the site selector in the top bar.
2. Navigate to the **Downloads** page from the sidebar.
3. The list loads automatically, showing the most recent downloads first.
4. Use the **search bar** to look up a specific user, IP address, or zip file name.
5. Use the **Resolution** dropdown to narrow results to a specific quality tier (Full, Web, View, High).
6. Use the **User** dropdown to filter by a specific account, or the **Group** dropdown to filter by user group.
7. Set a **From** and **To** date to limit results to a specific time window.
8. Click any column header to re-sort the list.
9. Click **Export CSV** to download up to 10,000 rows of the current filtered view.

Tips

- The **Date** column sorts newest-first by default — scroll through to review recent activity quickly.
- Combine the **User** and **IP** columns to spot unusual access patterns or shared credentials.
- Use the **Group** filter to audit download activity for an entire class of users at once.
- The **Story** column helps you identify which content is most in demand without cross-

referencing other pages.
- Apply date range filters before exporting to CSV to keep your reports focused and manageable.
- If you manage multiple DAM sites, switch sites using the top bar — the downloads list updates automatically.

Email Management

Email Management

Create and manage email templates, compose and send emails to contacts, and track delivery status — all from one central hub.

Key Features

- **Email Templates**: Build reusable templates for invoices, payment reminders, confirmations, and custom messages
- **Signature Library**: Create professional email signatures and attach them to any template
- **Compose & Send**: Write and send emails directly to contacts with CC, BCC, and scheduling support
- **Email Queue**: Monitor emails waiting to be delivered
- **Sent History**: Review all emails sent, with options to resend or retry failed messages
- **Open & Click Tracking**: See when recipients open your emails or click links
- **Gmail Integration**: Connect your Gmail account as an alternative sending method
- **SMTP Settings**: Configure a custom mail server for outgoing emails

How to Use

Managing Templates

1. Open **Email Management** — the Templates tab is shown by default
2. Click **New Template** to create a template, or click the edit icon on an existing one
3. Choose a template type: New Invoice, Payment Reminder, Payment Confirmation, Overdue Notice, or Custom

4. Enter a name, subject line, and compose the body using the rich text editor
5. Optionally attach a signature and choose whether it appears above or below the message
6. Set the template to **Active** so it can be used when sending emails
7. Click **Save** to store the template

To copy an existing template, use the **Duplicate** action — the copy is saved as inactive so you can edit it before use.

Composing an Email

1. Click **Compose Email** at the top of the page
2. Enter the recipient's address in the To field (separate multiple addresses with commas)
3. Optionally add CC or BCC recipients
4. Choose a saved template from the dropdown to pre-fill the subject and body, or write your own
5. To send later, set a **Schedule** date and time
6. Click **Send** — the email is queued and delivered automatically

Monitoring the Queue

Click the **Email Queue** tab to see emails that are pending or scheduled. Use this to confirm your messages are in line to be delivered.

Reviewing Sent Emails

Click the **Sent Emails** tab to view your sending history. From here you can:

- View the full content of any sent message
- Check open and click tracking data
- **Resend** a message to the same recipients
- **Retry** any email that failed to deliver

Email Settings

Click **Settings** in the Templates toolbar to configure:

- Your sender name and email address
- SMTP server credentials for custom mail delivery
- Gmail OAuth connection for sending via your Google account

Click **Signatures** to create or edit your email signatures.

Tips

- Keep templates active only when they are ready to use — inactive templates won't appear in the Compose dropdown
- Use the **Duplicate** action to create variations of a template without starting from scratch
- Check the Email Queue after sending to confirm your message was accepted for delivery
- Tracking data shows the first time a recipient opens an email, helping you follow up at the right moment

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Email Templates

Email Templates

Create and manage reusable email templates for your CRM workflow — quotes, contracts, invoices, appointments, and more.

Key Features

- **Template Library**: Store all your standard emails in one place, organized by category
- **Merge Variables**: Automatically personalize emails with contact names, project details, quote amounts, invoice numbers, and more
- **Live Preview**: See exactly how your email will look with real sample data before using it
- **Categories**: Organize templates by type — Quotes, Contracts, Invoices, Appointments, Portal, and General
- **Duplicate**: Copy any template as a starting point for a new one
- **Default Templates**: Load a set of professionally written templates to get started instantly

How to Use

Creating a Template

1. Click **New Template** in the top right
2. Enter a template name (used internally to identify it)

3. Choose a category from the dropdown
4. Write your subject line — you can include merge variables like `{{contact.first_name}}`
5. Write the email body in the text area — HTML formatting is supported
6. Click variable chips in the right panel to insert them at your cursor position
7. Click **Preview** to see how the email looks with sample data filled in
8. Click **Save Template**

Using Variables

The variables panel (right side of the editor) lists all available merge tags grouped by type:

- **Contact** — first name, last name, email, phone
- **Account** — company name, email, phone
- **Project** — name, start date, end date, venue
- **Quote** — number, total, valid until, link
- **Contract** — title, number, link
- **Invoice** — number, total, due date, link
- **Appointment** — type, date, time, location
- **Company** — your business name, phone, email
- **Portal** — client portal link

Click any variable chip to insert it directly into the email body at the current cursor position.

Loading Default Templates

Click **Seed Default Templates** to automatically create 10 pre-built templates covering the most common CRM scenarios — quote sent, invoice ready, contract signing, appointment confirmation, follow-up, and more. Any templates that already exist are skipped.

Managing Templates

Each template in the list has four actions:

- **Edit** — open the editor to modify the template
- **Duplicate** — create a copy to use as a starting point
- **Preview** — preview the rendered email with sample data
- **Delete** — permanently remove the template

Use the **Category** filter to narrow the list, or use the search bar to find templates by name or subject line.

Tips

- Use descriptive names so you can quickly find the right template when sending emails
- The preview feature fills in realistic sample data so you can check formatting and layout before sending
- Mark templates as **Inactive** if you want to keep them but hide them from use
- Duplicate an existing template and tweak it rather than starting from scratch for similar emails

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Flying License — Startup Package

Flying License — Startup Package

The Flying License is a one-time startup bundle that includes all Pro features plus two exclusive tools — **AirBeta** for recruiting beta testers and an **Investor Deck** builder for pitching to investors.

Key Features

- **Investor Deck**: Build a professional pitch deck through an 8-step guided wizard. AI assembles your answers into a polished presentation with live metrics pulled from your Pilot data.
- **Multiple Decks**: Create and manage multiple named decks, each with its own template and data. Your primary deck is marked with a star.
- **5 Templates**: Choose from Classic, Pitch Perfect, Data-Driven, Storyteller, and Startup Sprint to match your style.
- **Share & Export**: Enable a unique share link per deck and export to PDF or PowerPoint for offline use.
- **AirBeta**: Recruit and manage beta testers with AI-powered application scoring, a referral leaderboard, 10 branded email templates, and a public application form at your domain.
- **Wizard Progress**: Your progress is saved automatically — return any time to continue where you left off.
- **All Pro Features Included**: CRM & Contacts, Email Campaigns, AirShop, AirBooking, Client

Portal, AI Chat, Gallery & DAM, and Custom Domain.
- **Company-Scoped**: Both AirBeta and your Investor Decks are shared across all members of your company account.
- **Existing Client Discount**: Current subscribers get $100 off the one-time price ($399 instead of $499).

How to Use

Open Flying License

1. Click **Flying License** in the sidebar.
2. If you don't have the package yet, you'll see the upgrade page — click **Get Flying License** to purchase.

Build Your Investor Deck

1. From the Flying License dashboard, click **Start Wizard** on the Investor Deck card.
2. Complete all 8 steps: Business, Problem, Market, Product, Traction, Revenue, Team, and The Ask.
3. Once all steps are done, click **Generate Deck** to let AI assemble your presentation.
4. Click on your deck in the list to preview it, then share the investor link or export as PDF or PowerPoint.

Manage Your Decks

- All ready decks are listed directly in the Investor Deck card — click any deck to open it.
- Use the **pen icon** next to a deck to edit its data or switch templates, then regenerate.
- Use the **trash icon** to delete a deck (this cannot be undone).
- Click **New Deck** (top-right of the Investor Deck card) to create additional decks for different audiences or templates.

Set Up AirBeta

1. From the Flying License dashboard, click **Open AirBeta**.
2. Configure your application form and email templates to start collecting beta testers.

Tips

- You don't need to finish the wizard in one session — return any time to continue where you

left off.
- Regenerate your deck after editing so investors always see your latest data.
- Try different templates to match your brand or tailor the presentation to your audience.
- All team members share the same decks and beta program.
- The Flying License is a one-time payment that includes 12 months of access.

Groups

Groups

Groups define the access tiers in your DAM (Digital Asset Management) system, controlling what each type of user can see and download. Each group maps a named permission level to a set of accounts on your DAM site.

Key Features

- **Group list**: View all groups defined in your DAM site, including their name and description.
- **Access level badges**: Each group displays its access tier at a glance — Guest, Pending, No Download, Web Download, Full Download, or Admin — shown as a color-coded badge.
- **User count**: See how many accounts on the DAM site belong to each group, helping you understand the distribution of your user base.
- **Web ID reference**: Each group is linked to an internal DAM permission level identifier for traceability.
- **View & Edit actions**: Open a group to inspect its details or make changes directly from the list.

How to Use

1. Select a DAM site from the topbar site selector. The Groups list will load automatically.
2. Browse the list to see all groups configured for that site.
3. Use the **Access** column to quickly identify the permission level granted to each group.
4. Check the **Users** column to see how many accounts are assigned to each group.
5. Click **View** on any row to see full group details.
6. Click **Edit** to modify a group's settings.

Access Levels

Badge	Meaning
Guest	Read-only, limited visibility
Pending	Account awaiting approval
No Download	Can view assets but not download
Web Download	Can download web-resolution files
Full Download	Can download full-resolution files
Admin	Full administrative access

Tips

- Groups are defined at the DAM site level — switching to a different site in the topbar will show that site's groups.
- The user count reflects live data from the DAM, so you can see at a glance how many accounts hold each access level.
- To change which group an individual account belongs to, manage that account from the Accounts page.

Integrations

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

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Investor Deck

Investor Deck

An AI-powered pitch deck that builds a complete 12-slide investor presentation from your startup profile — editable, shareable, and ready to present or export as a PDF.

Key Features

- **Multiple Decks**: Create and manage several decks side by side — one per audience, narrative, or stage. Switch between them using the deck selector dropdown at the top.
- **Deck Templates**: Choose from 5 presentation styles when creating a deck — Classic, Pitch Perfect, Data-Driven, Storyteller, or Startup Sprint. Each template changes layout and typography to match your pitch style.
- **6 Color Themes**: Pick a visual style when creating a deck — Modern Dark, Clean Light, Bold Gradient, Minimal, Corporate Navy, or Warm Sunset. Your brand colors are applied automatically to charts.
- **AI Generation**: Click **Regenerate** to have AI build all 12 slides from your startup profile — cover, problem, solution, market, product, traction, business model, competition, team, financials, ask, and closing. Costs 10 credits.
- **Per-Slide Regeneration**: Click the magic wand icon in the slide toolbar to rewrite just the current slide with AI. Costs 2 credits per slide.
- **Inline Editing**: Click directly on any text in a slide to edit it. Changes save automatically.
- **Visual Charts**: Data slides include charts — TAM/SAM/SOM, revenue projections, use-of-funds breakdown, and traction metrics.

- **Speaker Notes**: Each slide has optional talking points. Toggle them using the notes icon in the slide toolbar. Notes are editable inline.
- **Presentation Mode**: Click **Present** (or press **F**) to enter full-screen mode. Use arrow keys to navigate. Press **Escape** to exit.
- **PDF Export**: Click **PDF** to download your complete investor deck as a formatted landscape PDF.
- **Shareable Investor Link**: Click **Share** to get a unique link anyone can view without logging in. Enable or disable the link at any time.

How to Use

1. Complete the Startup Wizard first — the deck is built from the data you enter there
2. On the Investor Deck page, click **New Deck**, choose a template and color theme, then click **Generate Deck**
3. Browse slides using the left sidebar thumbnails, the Previous / Next buttons, navigation dots, or your keyboard arrow keys
4. Click on any text to edit it directly — edits save automatically
5. To rewrite a single slide with AI, click the magic wand icon in the slide toolbar
6. Click **PDF** to download your deck as a file
7. Click **Share**, copy your investor link, and send it to investors

Managing Multiple Decks

- Use the **deck selector** (top left) to switch between your decks or create a new one
- Click the gear icon to **Rename**, **Duplicate**, or **Set as Primary** the current deck
- The primary deck is the one shared via your investor link
- Deleting a deck permanently removes it and its share link

Tips

- Keep your startup profile complete — the more detail you provide, the stronger your AI-generated deck
- Set your brand colors in the Startup Wizard before generating — they apply to charts automatically
- Use Presentation Mode when pitching live; use the editing view to refine content beforehand
- Duplicate a deck before making major changes so you always have a clean version to fall back on

- Use the toggle in the Share modal to disable your investor link without deleting the deck

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Invoices

Invoices

Create, send, and track invoices for your clients — including one-time and recurring billing on autopilot.

Key Features

- **Invoice Builder**: Add custom line items, products from your catalog, or pre-built packages with name, description, quantity, and price
- **Automatic Numbering**: Invoices are numbered sequentially (e.g., INV-2026-0001)
- **Multi-Currency**: Bill in USD, EUR, GBP, CAD, or AUD
- **Discounts & Tax**: Apply fixed or percentage discounts; set a tax rate on taxable items
- **Payment Methods**: Accept Stripe, bank transfer, check, PayPal, cash, or other
- **Public Payment Link**: Share a secure link so clients can view and pay — disable it anytime
- **Payment Recording**: Log partial or full payments with method, reference, and notes
- **Recurring Invoices**: Auto-generate invoices weekly, bi-weekly, monthly, quarterly, semi-annually, or annually
- **Renewal Reminders**: Automatically email clients before a recurring invoice is due
- **Project & Contract Linking**: Attach invoices to a project or contract for better organization
- **Dashboard Stats**: See total revenue, outstanding balance, overdue count, and paid count at a glance

How to Use

Create an Invoice

1. Click **New Invoice**, select the client account and optional contact
2. Set the title, issue date, and due date
3. Add line items using **Custom Item**, **Product**, or **Package** buttons
4. Apply a discount and/or tax rate if needed

5. Choose which payment methods to accept
6. Optionally link to a project or contract and fill in billing info
7. Add internal notes or client-facing terms, then click **Save Invoice**

Send an Invoice

1. Open the invoice and click **Send** to email it to the client
2. Or click **Mark as Sent** if you sent it another way
3. Share the public link — the invoice moves to **Viewed** once the client opens it

Record a Payment

1. Open the invoice and click **Record Payment**
2. Enter the amount, date, method, and an optional reference or note
3. Save — the status updates automatically (Partially Paid → Paid)

Set Up Recurring Billing

1. Open any invoice and click **Make Recurring**
2. Name the schedule, choose the frequency, and set a start date
3. Enable **Auto-Send** to email invoices to the client automatically
4. Optionally set a renewal reminder (0, 3, 7, 14, or 30 days before each invoice)
5. Save — new invoices generate on schedule without any manual work

Manage Schedules

- Pause, resume, or cancel a recurring schedule at any time
- View all invoices generated from a schedule in one place

Invoice Statuses

Status	Meaning
Draft	Not yet sent — can be edited or deleted
Sent	Delivered to the client
Viewed	Client has opened the public link
Partially Paid	Payment received but balance remains
Paid	Fully paid

Status	Meaning
Overdue	Past due date with an outstanding balance
Cancelled	Closed without payment — can be deleted

Tips

- Use **Duplicate** to copy an invoice for a similar client
- Use **Revert to Draft** to edit a sent, viewed, or overdue invoice before resending
- Use **Copy Link** from the list to grab the public payment link without opening the invoice
- Filter by **Year** or **Status** to quickly find what you need
- Delete draft and cancelled invoices in bulk using the checkbox selection
- Use **Mark as Sent** in bulk to update multiple invoices at once
- The **Outstanding** stat includes all sent, viewed, and partially paid invoices

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Invoicing

Invoicing

Create, send, and track professional invoices with online payment collection and full payment history.

Key Features

- **Invoice Creation**: Build invoices with line items, quantities, rates, and tax rates that calculate totals automatically
- **Online Payments**: Accept credit card payments via Stripe with a secure checkout link sent directly in your invoice email
- **Multiple Payment Methods**: Enable Stripe, ACH, Zelle, check, or wire transfer on any invoice
- **Public Invoice Link**: Every invoice gets a secure shareable link (inv.air4.link) customers can open to view and pay
- **Viewed Tracking**: Know when a client opens their invoice — the status updates to Viewed automatically

- **Payment History**: View all payments per invoice, edit manual entries, and delete records as needed
- **Payment Tracking**: Record manual payments and track partial payments — the balance updates automatically
- **Refunds**: Issue full or partial Stripe refunds directly from the invoice, with reason tracking
- **Status Management**: Invoices move through Draft → Sent → Viewed → Partially Paid → Paid automatically, or update manually
- **Duplicate Invoices**: Copy any invoice instantly to create a similar one without re-entering details
- **PDF Download**: Download any invoice as a PDF for your records or offline sharing
- **Recurring Invoices**: Set up invoices to repeat on a schedule and manage them from the recurring view
- **Products Library**: Save line items as reusable products to speed up invoice creation
- **Currency Support**: Issue invoices in USD, EUR, GBP, CAD, or AUD
- **Dashboard Stats**: See total revenue, outstanding balance, overdue count, and paid invoice count at a glance

How to Use

Create an Invoice

1. Click **Create Invoice** from the Invoicing page
2. Select a client and set the issue and due dates
3. Add line items — enter a description, quantity, and rate; the amount calculates automatically
4. Set a tax rate if applicable; the subtotal, tax, and total update in real time
5. Choose which payment methods to offer (Stripe, ACH, Zelle, check, wire)
6. Click **Save** to save as a draft

Send an Invoice

1. Open an invoice and click **Send**
2. Search for recipients by name or email — contacts auto-suggest as you type (To, CC, BCC)
3. Choose an email template: Standard Invoice, Payment Reminder, Overdue Notice, or Custom Message
4. Optionally edit the subject and add a personal message
5. Click **Send Invoice** — the customer receives an email with a "View & Pay Invoice" button

Record a Payment

1. Click **Record Payment** on any sent invoice
2. Enter the amount, payment method, and date
3. Save — the balance due updates and the status changes to Paid when fully settled

View Payment History & Refunds

1. Click **View Payments** on any invoice to see all recorded payments
2. Edit manual payment details or delete entries as needed
3. For Stripe payments, click **Refund** to issue a full or partial refund and select a reason

Copy the Public Link

1. Click **Copy Link** on any invoice
2. Share the link with your client — they can view the invoice and pay online without logging in

Tips

- Set invoices to **Draft** while building them; clients cannot see them until sent
- Use **Duplicate** from the row menu to clone an existing invoice and save re-entry time
- The **Overdue** stat card highlights when invoices have passed their due date unpaid
- Select multiple invoices to batch delete or mark as sent at once
- Use **Mark as Sent** or **Mark as Draft** from the row actions to manually adjust status
- Filter by status or year to quickly find what you need in large lists
- Partial payments are supported — record multiple payments and the balance tracks automatically
- Only draft or cancelled invoices can be permanently deleted

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Lightboxes

Lightboxes

Lightboxes are curated collections of assets that DAM users create to save and share selected media items. This page gives you a company-wide view of all lightboxes created across your

DAM site.

Key Features

- **Lightbox List**: See all lightboxes created by DAM users, with the name, owner, item count, and creation date at a glance
- **Item Count**: Each row shows exactly how many assets are saved in that lightbox
- **Type**: Lightboxes can be of different types, letting you distinguish personal collections from other uses
- **Share Code**: Each lightbox has a unique sharing code that allows it to be shared externally
- **Search**: Filter lightboxes by name or user to find the one you need quickly
- **Sorting**: Click any column header to sort by name, user, type, or date created

How to Use

1. Select a DAM site from the topbar — the list will load automatically for that site
2. Browse the list of lightboxes, sorted by most recently created by default
3. Use the search bar to filter by lightbox name or the username of the creator
4. Click **View** on any row to inspect the details of that lightbox
5. Switch between DAM sites using the topbar to see lightboxes for a different site

Tips

- The **Items** column shows how many assets have been saved into each lightbox — a count of 0 means the lightbox is empty
- The **Share Code** column contains the token used to share a lightbox with external users; if a code is present, that lightbox has been shared
- Lightboxes are created and managed by DAM front-end users — this page is a read-only overview for administrators
- Use the **Type** column to identify whether a lightbox is a personal selection or another category defined by your DAM configuration

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Log Manager

Log Manager

View and manage system activity logs across the platform. Monitor errors, security events, and page activity from one central location.

Key Features

- **Six Log Types**: Tracks Error, Info, Debug, Warning, Access, and Security events separately
- **Live Log Viewer**: Click any log file to read its entries directly in the browser
- **Adjustable View**: Choose to display the last 50, 100, 200, or 500 log lines
- **Clear Logs**: Erase a single log file or clear all logs at once with one click
- **Copy & Select**: Copy log content to clipboard or select all text for easy export
- **Page Logging Control**: Enable or disable activity logging for each page individually
- **Toggle All Pages**: Turn logging on or off across all pages simultaneously with one button

How to Use

Viewing a Log

1. Open the **Log Manager** page from the sidebar
2. The **Log Files** panel shows all six log types and their current file sizes
3. Click the eye icon next to any log type to load its contents into the viewer below
4. Use the **Last N lines** dropdown at the top to control how many entries are shown
5. Click **Refresh** to reload the latest data at any time

Copying Log Content

1. Load a log into the viewer by clicking its eye icon
2. Click the **Copy** button (clipboard icon) to copy all visible content to your clipboard
3. Or click the **Select** button (text icon) to highlight the text, then copy manually

Clearing Logs

- To clear a single log: click the trash icon next to the log type in the Log Files panel
- To clear all logs at once: click the trash button in the Log Files panel header and confirm

Controlling Page Logging

1. The **Page Logging** panel lists every active page in the platform
2. Toggle the switch next to any page to enable or disable logging for that page
3. Click the toggle button in the Page Logging header to enable or disable all pages at once

Tips

- Check the **Error** log first when troubleshooting unexpected behavior
- The **Security** log records login attempts and access events — review it regularly
- File sizes are shown next to each log name — large files may indicate high activity or an ongoing issue
- Clearing logs is permanent and cannot be undone — export important entries before clearing

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Login & Account Access

Login & Account Access

The login page is your gateway to Air4.media. From here you can sign in, create a new account, or recover access if you've forgotten your password.

Key Features

- **Email & Password Login**: Sign in securely with your registered email and password.
- **Google Sign-In**: Log in instantly using your existing Google account — no separate password needed.
- **New Account Registration**: Create an account with your name, email, phone number, and a secure password.
- **Email Verification**: New accounts require email verification before you can log in. A 6-digit code and a verification link are both sent to your inbox.
- **Password Reset**: Forgot your password? Request a reset link sent directly to your email, valid for 60 minutes.
- **Multi-Factor Authentication (MFA)**: Accounts with MFA enabled are prompted to verify via email code, SMS, or Google Authenticator after signing in.

- **Spam Protection**: Registration and password reset forms are protected by Google reCAPTCHA to block automated abuse.

How to Use

Signing In

1. Enter your email address and password.
2. Click **Sign In**.
3. If MFA is enabled on your account, complete the verification step.
4. You will be taken to your dashboard.

Signing In with Google

1. Click **Continue with Google**.
2. Select your Google account and grant permission.
3. First-time users will be asked to provide and verify a phone number via SMS — this enables security alerts and MFA on your account.
4. You will be signed in and taken to your dashboard.

Creating a New Account

1. Click the **Register** tab.
2. Enter your full name, email address, and phone number (international formats supported).
3. Agree to SMS communications — required for security alerts and verification codes.
4. Choose a password (at least 8 characters with uppercase, lowercase, and a number).
5. Click **Get Your Boarding Pass**.
6. Check your email for a 6-digit verification code or a clickable link to activate your account.

Verifying Your Email

If your account is not yet verified, you'll see a verification screen after attempting to log in.

1. Check your email for the 6-digit code.
2. Enter the code and click **Verify** — or click the link directly in the email.
3. Didn't receive the code? Click **Resend Code**.
4. Used the wrong email? Click **Change Email** to update your address and resend.

Resetting Your Password

1. Click the **Reset Password** tab.
2. Enter your email address and click **Send Reset Link**.
3. Check your email for a reset link (valid for 60 minutes).
4. Click the link and choose a new password.

Tips

- Passwords must contain at least 8 characters, one uppercase letter, one lowercase letter, and one number.
- The 6-digit verification code expires in 10 minutes — click **Resend Code** if it times out.
- If you registered via Google, use the **Continue with Google** button each time rather than email and password.
- Check your spam folder if you don't receive verification or reset emails within a few minutes.

Login Monitor

Login Monitor

Track every login attempt across your platform in real time. See who is logging in, when, from which IP address, and whether they succeeded or failed.

Key Features

- **Summary Stats**: At-a-glance cards showing total attempts, successful logins, failed logins, and overall success rate — all for the past 7 days.
- **Activity Chart**: A visual timeline of login activity. Switch between a 7-day or 30-day view to spot patterns or unusual spikes.
- **Attempts Table**: A full, paginated log of every login attempt with date, email, user name, status, IP address, and failure reason.
- **Sortable Columns**: Click any column header to sort by date, email, status, IP address, or failure reason.
- **Search**: Filter the list by email address, IP address, or user name to quickly locate specific

activity.

How to Use

1. Open **Login Monitor** from the sidebar.
2. Review the four stat cards at the top for a quick summary of the past 7 days.
3. Check the **Recent Login Activity** chart to see trends over time. Click **7 Days** or **30 Days** to change the period.
4. Scroll down to the **Login Attempts** table to see the full log.
5. Click any column header to sort the list. Use the search box to filter by email, IP, or name.
6. Look at the **Status** badge — green means the login succeeded, red means it failed.
7. For failed attempts, the **Reason** column explains why the login was rejected.

Tips

- A low success rate (below 60%) may indicate a brute-force attack or users having trouble with their credentials.
- Sort by **IP Address** to identify a single source generating many failed attempts.
- Use the **30-day** chart view to spot recurring patterns at specific times of day or week.
- This page is only visible to platform administrators.

Logout

Logout

Securely ends your current session and returns you to the login page.

Key Features

- **Session Termination**: Completely clears your active session so no one else can access your account from the same browser.
- **MFA Cookie Removal**: If you use two-factor authentication, any saved verification tokens are also cleared on logout.
- **Automatic Redirect**: After logging out, you are immediately taken back to the login page.

How to Use

1. Click the **Logout** option in the sidebar or navigation menu.
2. Your session is ended instantly.
3. You are redirected to the login page automatically.

Tips

- Always log out when using a shared or public computer to keep your account secure.
- Closing the browser tab does not log you out — use the Logout option to fully end your session.
- If you use two-factor authentication, logging out also clears your saved verification, so you will need to verify again on your next login.

Logs

Logs

The Logs page shows a summary of all file delivery activity for your DAM site — how many files were sent to each destination within a selected time window, and what type of delivery was used.

Key Features

- **Delivery summary**: Each row represents a destination that received files, showing its name, delivery type, and total files transmitted during the selected period.
- **Delivery type badges**: Each destination is labeled as FTP Out, Web In, or Removed so you can see at a glance how files were delivered.
- **File quantity**: The Quantity column shows how many files were transmitted to each destination.
- **Date range filter**: Filter by a start and end date to focus on a specific time window. The default view shows the last 24 hours.
- **Search**: Type a destination name to instantly filter matching entries.
- **Drill-down detail**: Click **View Details** on any row to see the individual file records for that

destination — including each file name, start time, end time, and remote path.
- **CSV export**: Download up to 50,000 individual transmission records as a spreadsheet-ready CSV file.

How to Use

1. Select your DAM site from the topbar — logs are site-specific.
2. The list loads automatically showing activity from the last 24 hours.
3. Use the **From** and **To** date fields to change the time window.
4. Type in the search box to filter by destination name.
5. Click **View Details** on any row to drill into the individual file transmissions for that destination.
6. Click the back button to return to the summary view.
7. Click **Export CSV** to download the full transmission records for the current date range.

Tips

- The default view covers the last 24 hours — widen the date range if you're reviewing a full campaign or delivery window.
- Use **View Details** to verify exactly which files were sent and when, or to troubleshoot a delivery.
- CSV exports include individual file records (not the summary), with up to 50,000 rows, respecting your active date range.
- Destinations marked as **Removed** were once active delivery targets that no longer exist in your workflow configuration.

Menu Management

Menu Management

Control which pages appear in the navigation menus across all platform areas. Reorder items, hide unused pages, and organize your menus by platform and feature group.

Key Features

- **Drag-and-Drop Reordering**: Grab any menu item and drag it to a new position or into a different feature group
- **Sidebar & Top Bar**: Switch between the sidebar menu and top bar menu using the buttons at the top of the page
- **Show/Hide Items**: Toggle any menu item on or off without deleting it — hidden items are shown with a strikethrough
- **Edit Item Details**: Change a menu item's title, icon, location, platform, group, and submenu placement
- **Submenu Support**: Assign a parent item to nest pages as submenu entries beneath a top-level item
- **Live Preview**: See a real-time preview of how the menu will look as you make changes
- **Platform Organization**: Items are organized by platform (All Platforms, Air4 Pilot, Pilot, Portal) and collapsible feature groups

How to Use

Reorder Menu Items

1. Open the **Menu Management** page
2. Find the item you want to move in the **Menu Structure** panel
3. Click and drag the item to its new position — you can move it within a group or into a different feature group
4. Release to drop it in place; the order saves automatically

Show or Hide a Menu Item

1. Locate the item in the **Menu Structure** list
2. Click the **eye icon** on the right side of the item row
3. An open eye means the item is visible; a crossed-out eye means it is hidden
4. The change takes effect immediately

Edit a Menu Item

1. Click the **edit (pencil) icon** next to any menu item
2. Update the **Title** or **Icon** as needed — use the icon picker button to browse available icons
3. Change the **Menu Location** (Sidebar, Top Bar, Footer, or None) if moving the item

4. Set a **Parent Menu** to nest it as a submenu item under another entry
5. Adjust the **Platform Level** and **Feature Group** to control where it appears in the structure
6. Check or uncheck **Active** and **Show Divider After** as needed
7. Click **Save Changes**

Switch Between Menus

- Click **Sidebar Menu** or **Top Bar Menu** at the top of the page to manage each menu separately

Tips

- The **Dashboard** and **Menu Management** items are protected and cannot be hidden or moved
- Platform sections can be collapsed and expanded by clicking the section header — your collapsed/expanded state is remembered between visits
- Use the **Refresh** button to reload the menu data if you need to discard unsaved drag-and-drop changes
- Items showing a badge like **"2 sub"** have submenu children — click the edit icon to see or change their parent assignment
- Setting **Menu Location** to **None** removes the item from all menus without deleting it from the system

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Module Manager

Module Manager

The Module Manager gives platform administrators a central place to view, enable, and disable Pilot modules and extensions across all sites.

Key Features

- **Module Cards**: Each module is displayed as a card showing its name, category, description, version, and how many sites currently have it active.
- **Enable / Disable Toggle**: A toggle switch on each card turns a module on or off globally

with a single click.
- **Category Filtering**: Filter the module list by category — Marketing, Engagement, Content, Commerce, or Collaboration.
- **Search**: Type in the search bar to find modules by name, description, or category.
- **Module Details**: Click the Details button on any card to open a full information panel, including version metadata and a list of sites where the module is active.
- **Installation Status**: Each card shows a status indicator — a green checkmark if the module files are installed, or a warning icon if the module folder is missing.

How to Use

Enabling or Disabling a Module

1. Locate the module you want to change using the search bar or category filter.
2. Use the toggle switch in the top-right corner of the module card.
3. The page refreshes automatically and a confirmation message confirms the change.

Viewing Module Details

1. Click the **Details** button on any module card.
2. The details panel shows:
   - Module version and category
   - Current enabled/disabled status
   - Whether the module files are installed
   - A list of all sites that have this module active, with each site's activation status

Filtering by Category

1. Use the **Category** dropdown above the module list.
2. Select a category (Marketing, Engagement, Content, Commerce, or Collaboration) to show only modules in that group.
3. Select **All Categories** to clear the filter.

Searching for a Module

1. Type in the search bar at the top of the list.
2. Results update as you type, matching against the module name, description, and category.

Tips

- The number shown on each card under **Sites** tells you how many sites currently have that module activated — useful for understanding impact before disabling.
- A warning icon on a card means the module's files are not installed on the server, even if it appears enabled.
- Disabling a module here affects it globally — it will be unavailable across all sites until re-enabled.

Newsletter

Newsletter

The Newsletter section in AirDAM shows the history of stories that have been distributed through newsletters. Use it to see which stories were sent, when they were dispatched, and which newsletter or digest they were included in.

Key Features

- **Dispatch History**: A chronological log of all newsletter sends linked to your DAM stories, with the most recent entries shown first.
- **Story Thumbnail**: Each record displays a thumbnail image of the story for quick visual identification.
- **Story Title**: See the title of the story that was included in the newsletter, giving you quick context without leaving the page.
- **Newsletter & Digest Tracking**: See the specific newsletter ID and digest associated with each dispatch, useful when you publish multiple newsletters or digest editions.
- **Search**: Filter records by newsletter ID or digest name to quickly find a specific dispatch.
- **Sortable Columns**: Sort by Newsletter ID or Sent date to organize your view.

How to Use

1. Select a DAM site from the site selector in the top bar — the list will not display until a site is chosen.

2. The newsletter dispatch log loads automatically, showing the most recent sends at the top.
3. Use the search bar to filter by newsletter ID or digest name.
4. Click the **Newsletter ID** or **Sent** column headers to sort the list in ascending or descending order.
5. Use the pagination controls at the bottom to browse older records.

Tips

- If the list is empty, no newsletter dispatches have been recorded for the selected site yet.
- The default view shows the most recent dispatches first — useful for quickly checking what went out last.
- This section is a read-only log. To manage newsletter campaigns and subscribers, use the Airmail module.

Onboarding

Onboarding

The onboarding wizard gets your business set up on Air4.media in about 2 minutes. It walks you through 3 simple steps and has everything ready so you can start working right away.

Key Features

- **3-step wizard**: A progress bar keeps you oriented — Your Business, Pick a Plan, and Payment
- **Live site preview**: As you type your business name, your free subdomain (e.g. `mybusiness.air4.media`) appears in real time
- **Brand setup**: Optionally upload your logo and pick a brand color to personalize your account
- **Flexible plans**: Choose from several plans with monthly or annual billing — annual saves about 17%
- **Intro offer**: New accounts get a discount on the first months of paid plans
- **Secure payment**: Card details are entered via Stripe and never stored on Air4.media servers
- **All features included**: Every plan comes with all tools enabled — CRM, email marketing,

media, website builder, online booking, and more
- **Instant activation**: Your account and a starter website are created the moment you complete setup

How to Use

1. Enter your business name (required) — your free subdomain appears as you type
2. Optionally select your industry and enter your website URL
3. Expand **Brand your business** to upload a logo and choose a brand color
4. Click **Continue** to go to plan selection
5. Toggle between **Monthly** or **Annual** billing, then click a plan to select it
6. Click **Continue** to proceed to payment
7. Review the order summary, enter your card details, check the authorization box, and click **Launch My Business**
8. Your business and starter website are created instantly — click **Go to Dashboard** to begin

Tips

- A card is required for all plans, but free plans are never charged
- Annual billing saves approximately 17% compared to paying month to month
- The intro offer discount appears automatically on qualifying plans in the order summary
- Your business name becomes your subdomain — choose something easy to remember
- Logo and brand color can be updated anytime from Company Settings
- You can upgrade your plan at any time without losing data
- Admins can add additional companies to their account by running the wizard again from their dashboard
- A welcome email with your account summary is sent automatically after setup completes
- A Startup Package (one-time fee) is available on the plan step if you want Air4.media to set everything up for you

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Page Management

Page Management

Create, configure, and manage all pages within the platform. This admin-only tool controls which pages exist, where they appear in the navigation, and what resources they use.

Key Features

- **Page List**: View all system pages with their title, path, menu location, display order, and active/inactive status at a glance.
- **Create New Pages**: A two-step wizard guides you through setting up a new page, automatically generating the required files.
- **Template Types**: Choose between a Basic Page (simple content display) or a CRUD Page (for managing database records with a built-in list).
- **Navigation Control**: Assign pages to the sidebar, top bar, or no menu at all.
- **Edit Pages**: Update a page's name, navigation settings, icon, and the list of files it depends on.
- **Deactivate Pages**: Removing a page hides it from all menus while preserving its files for recovery.
- **Sortable List**: Click any column header to sort pages by title, path, menu location, order, or status.

How to Use

Creating a New Page

1. Click **Create New Page** in the top right corner.
2. **Step 1 — Name and type**: Enter a page name and select the template type.
   - Choose **Basic Page** for a standard content page.
   - Choose **CRUD Page with Database** to build a page that manages records from a database table.
3. Click **Next**.
4. **Step 2 — Settings**: Configure the page's navigation and appearance.
   - Select a **Menu Location**: Sidebar, Top Bar, or No Menu.
   - Enter an **Icon** class (e.g. `fas fa-star`) to display alongside the menu item.
   - For CRUD pages, select the **Database Table** the page will work with.
   - Review the auto-generated asset file paths. You can add or remove files as needed.
5. Click **Create Page**. The page and all its supporting files are created automatically.

Editing a Page

1. Find the page in the list and click **Edit**.
2. Update the **Page Name**, **Menu Location**, or **Icon** as needed.
3. In the **Page Assets** section, add or remove associated view, handler, JavaScript, CSS, or support files.
4. Click **Save Changes**.

Deactivating a Page

1. Find the page in the list and click **Delete**.
2. Confirm the action when prompted.
3. The page is removed from all menus and marked as inactive. Its files are preserved on the server.

Searching and Sorting

- Use the search bar to filter pages by title, path, or description.
- Click any column header to sort the list. Click again to reverse the sort order.

Tips

- **Active vs. Inactive**: The Status column shows a green badge for active pages and a red badge for inactive ones. Inactive pages still appear in this list so you can reactivate them if needed.
- **Auto-generated paths**: When you type a page name in the creation wizard, the URL path and asset file names are generated automatically from the name — you rarely need to change them.
- **CRUD pages and database tables**: If you choose a CRUD template, the database table dropdown is populated from the live database, so only existing tables appear.
- **Support files**: The Support Files section is for referencing backup or reference files that are tracked with the page but not loaded directly.

Pilot Settings

Pilot Settings

Configure system-wide settings for your Pilot account, including AI integrations, API credentials, and general platform preferences.

Key Features

- **Organized by Category**: Settings are grouped into logical sections so you can quickly find what you need.
- **AI Provider Setup**: Connect Claude, OpenAI, Gemini, or Ollama by entering your API keys and selecting which model to use.
- **Auto-Discover Models**: Automatically fetch the latest available AI models for each provider with a single click.
- **Secure Password Fields**: API keys and credentials are masked by default, with a toggle to reveal them when needed.
- **Toggle Switches**: Enable or disable features instantly using simple on/off switches.

How to Use

1. Navigate to **Pilot Settings** from the sidebar menu.
2. Find the setting you want to change — settings are grouped by category with a heading for each group.
3. Update the value:
    - **Text fields**: Type directly into the field.
    - **Dropdowns**: Click to select from the available options.
    - **Switches**: Click the toggle to turn a feature on or off.
    - **Password fields**: Enter your credential; click the eye icon to reveal or hide the value.
4. For AI providers, enter your API key first, then click **Discover Models** to load the available models for that provider into the dropdown.
5. Select your preferred model from the dropdown.
6. When all changes are made, click **Save Settings** at the bottom of the page.
7. A confirmation message will appear confirming your settings were saved.

Tips

- Always enter an API key before clicking **Discover Models** — the button will warn you if the key is missing (Ollama does not require a key).

- If a Discover Models request fails, double-check that the API key is correct and active.
- Changes are saved all at once when you click **Save Settings** — there is no auto-save.
- Each category section groups related settings together, making it easier to configure one integration at a time.

Pipeline

Pipeline

The Pipeline page gives you a visual overview of all your deals, showing where each opportunity stands across your custom sales stages — from first contact through to won or lost.

Key Features

- **Kanban Board**: See all deals organized in columns by stage, with each column showing deal count and total value
- **Drag & Drop**: Move a deal to a new stage by dragging its card to the target column — the change saves automatically
- **List View**: Switch to a compact table view grouped by stage, showing deal name, account, type, value, created date, event date, and priority
- **Summary Stats**: Four cards at the top show Pipeline Value, Active Deals, Won This Month, and Win Rate (last 90 days). Click any stat card to filter the board to that segment — click it again to clear the filter
- **Toolbar Total**: A running total reflects the estimated value of all deals currently visible after any filters are applied
- **Quick Add Lead**: Click **New Lead** to add a deal — include name, account (select existing or create new on the spot), contact details, estimated value, type, event date, and notes
- **Quick View**: Click any deal card to open a detail panel showing account, contact, dates, estimated and contracted values, payment progress, recent activity, and a stage selector. A **Full Edit** link opens the complete project editor
- **Mark Won / Mark Lost**: Trophy and X buttons appear on each card and in Quick View. Marking a deal won moves it to your Won stage and automatically upgrades the account from prospect to client
- **Log Contact**: In the "Contacted" stage, a **Log Contact** button appears on each card. Record

the contact method (phone call, email, meeting, SMS, or follow-up) and an optional note. A badge shows the total number of contact attempts made

- **Age Indicators**: Cards show a color-coded age badge — green for deals up to 3 days old, through red for deals older than 30 days — so stale opportunities are easy to spot
- **Priority Badges**: Cards display priority (Urgent, High, Normal, Low) as a colored badge — urgent deals are highlighted in red
- **Filters**: Narrow the board by account, deal type, or priority; search by deal or account name
- **Financial Progress**: Each card shows the estimated value and a payment progress bar
- **Custom Stages**: Click the gear icon to add, rename, reorder, and color-code your pipeline stages. Each stage maps to a project status, and one stage can be flagged as your Won stage

How to Use

1. Open **Pipeline** from the sidebar to see your Kanban board
2. Review the summary cards at the top for a quick health check — click a card to filter the board to that segment
3. Click **New Lead** to add a deal — fill in the name, account, and any available details
4. Drag a deal card from one column and drop it into the next stage to advance it
5. Use the **Account**, **Type**, or **Priority** filters — or the search box — to focus on specific deals
6. Click any card to open Quick View — review deal details, change the stage, see recent activity, or click **Full Edit** for the full project editor
7. In the "Contacted" stage, click **Log Contact** on a card to record a call, email, meeting, SMS, or follow-up attempt
8. Click the **trophy** icon to mark a deal won, or the **X** to mark it lost (you can add a reason for losing)
9. Click the **gear icon** to manage your stages — add, rename, reorder, set colors, designate a Won stage, and set the default entry stage

Tips

- **Pipeline Value** only counts active deals (not completed or cancelled), so it always reflects real open opportunities
- **Win Rate** is calculated over the last 90 days — focus on recent activity to see the most meaningful trend
- **Won This Month** counts deals that moved to contracted status within the current calendar month

- Recently won deals stay visible on the board for 30 days so you can reference them before they move off
- Set one stage as **Default** so new leads always land in the right column automatically
- **Age badges** turn red for deals older than 30 days — use them to identify deals that need follow-up
- You must keep a minimum of 2 stages; stages with active deals must have those deals reassigned before the stage can be deleted

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Platform Dashboard

Platform Dashboard

A real-time command center giving platform administrators an instant overview of the entire system — services, companies, revenue, email, chats, and login activity — all in one place.

Key Features

- **Health Indicators**: Six at-a-glance cards showing services running, total companies (with site count), total users, emails sent in the last 24 hours, revenue for the last 30 days, and total storage used across all companies. Alerts appear directly on the cards when there are service errors, failed emails, or overdue invoices.
- **Services Status**: A live list of every background service with its current status (running, stopped, or error) and how long ago it last ran. A color-coded dot makes it easy to spot problems at a glance.
- **Companies Overview**: A scrollable list of all companies on the platform, showing their subscription plan, number of users, number of sites, and storage usage. Sorted by most recently created.
- **Revenue Panel**: A summary of paid invoice revenue for the last 30 days and last 7 days, the number of invoices paid, and any overdue invoices with their total outstanding amount.
- **Email System**: Delivery statistics for outgoing emails — sent and failed counts for the last 24 hours and 7 days, plus how many are currently queued or actively sending right now.
- **AirChat**: A snapshot of customer chat conversations — active sessions, escalated chats, new conversations today, and totals for the week and all time.
- **Recent Logins**: The 10 most recent login attempts across all users, showing name, IP address, time, and whether the login succeeded or failed.

How to Use

1. Open the Platform Dashboard from the main navigation.
2. Review the six health cards at the top — red indicators signal issues that need attention.
3. Scroll down to check the Services list. Any service showing "error" should be investigated via the **Services** button in the top bar.
4. Check the Companies panel to see new sign-ups or review storage and site usage per company.
5. Monitor the Revenue panel for overdue invoices that may need follow-up.
6. Use the Email System panel to confirm messages are being delivered — a high failed count may indicate a configuration issue.
7. Watch the Recent Logins list for any failed login attempts that could signal unauthorized access.

Tips

- Click **Services**, **Users**, or **Logs** in the top-right toolbar to jump directly to the relevant management page.
- The Companies and Email System panels each have a **Manage** link for quick access to deeper controls.
- Click **View All** in the Recent Logins panel to open the full Login Monitor with complete history.
- Data loads automatically when you open the page — refresh the page to get the latest numbers.
- Overdue invoice counts shown in red in both the health cards and revenue panel represent the same data — address them from the invoicing section.

Portal Design

Portal Design

Customize the look and feel of your public DAM portal — the interface your clients and collaborators see when accessing shared assets.

Key Features

- **Theme Presets**: One-click themes to get started instantly, including a special "Match Site" option that inherits your site's existing brand colors
- **Branding**: Set your portal name, upload a logo (PNG or SVG), and choose a font from 8 professional options
- **Color Customization**: Fine-tune every color in the portal — primary, accent, backgrounds, text, and status colors
- **Layout Controls**: Adjust card border radius, grid spacing, and border visibility with simple sliders
- **Custom CSS**: Advanced users can add CSS overrides for complete control
- **Live Preview**: See your changes in real time across desktop, tablet, and mobile views before saving

How to Use

1. Select your DAM site from the topbar — the editor loads that site's current design
2. Click a **Theme Preset** to apply a ready-made look instantly
3. Expand the **Branding** section to set your portal name, upload a logo, and pick a font
4. Expand **Colors** to fine-tune individual colors using color pickers or hex codes
5. Expand **Layout** to adjust border radius, grid gap, and border opacity
6. Watch the live preview update as you make changes — switch between desktop, tablet, and mobile views
7. Click **Save Design** when you're happy with the result

Tips

- Use **Match Site** preset to automatically pull in your existing site brand colors as a starting point
- Click **Reset to Preset** to undo all unsaved changes and return to the currently selected preset
- For your logo, use a PNG or SVG with a transparent background for the best result
- The preview refreshes live — click the refresh icon if it ever gets out of sync with your changes
- Custom CSS is great for fine details, but start with presets and color controls before going advanced

Pricing

Pricing

The Pricing page gives you a clear overview of all available Air4.media plans so you can choose the right fit for your business before signing up.

Plan Tiers

Air4.media offers four plans, each named after a travel class:

- **Economy** — The free plan. A great starting point to explore the platform at no cost.
- **Premium Economy** — The starter plan for small teams ready to grow.
- **Business** — The most popular plan, built for growing businesses needing more power and capacity.
- **First Class** — The enterprise plan with white-label options, dedicated support, and the highest limits.

Each plan card shows the number of users, sites, storage, contacts, monthly emails, and AI credits included.

Billing Options

When you sign up, you can choose between **monthly** or **annual** billing. Annual billing saves approximately 17% compared to paying month-to-month.

Intro Offer

New accounts qualify for an introductory offer — 50% off for the first two months. The discounted price is shown automatically on each plan card during sign-up.

Startup Package

A one-time **Flying License** package is available for startups. This includes access to the AI Investor Deck Generator and other startup-focused tools for a flat fee.

How to Sign Up

1. Review the plan tiers on the Pricing page.
2. Click **Get Started** on the plan that fits your needs.
3. Complete the onboarding wizard: enter your business info, confirm your plan, and add a payment method.
4. Your account is ready — head straight to your dashboard.

Tips

- Annual billing is the best value if you plan to use Air4.media long-term.
- The Business plan is highlighted as the most popular choice for growing teams.
- You can upgrade your plan at any time from your account settings.
- The Economy plan requires no credit card — ideal for trying the platform risk-free.

Products & Packages

Products & Packages

Manage your catalog of billable items — individual products and services, bundled packages, and tax rates — all used when creating quotes and invoices.

Key Features

- **Products List**: View, search, filter, and manage all your items with sortable columns, pagination, and a toggle between table and card view
- **Product Types**: Categorize items as Service, Product, Rental, or Labor
- **Billing Cycles**: Set items as one-time, monthly, or annual charges
- **Packages**: Bundle multiple products into a single offering with optional discounts — view as cards or a table
- **Tax Rates**: Define reusable tax rates that auto-apply to quotes and invoices
- **Quick Stats**: Dashboard cards show total products, active items, services, and packages at a glance

How to Use

Adding a Product

1. Go to **Products & Packages** and make sure you're on the **Products** tab
2. Click **New Product**
3. Enter a name and select the type (Service, Product, Rental, or Labor)
4. Set the price, unit (e.g. hour, day, each), and billing cycle
5. Optionally add a category and SKU for organization
6. Check **Taxable** if tax should apply, and **Active** to make it available
7. Click **Save Product**

Managing Products

- **Search** by name, description, category, or SKU using the search bar
- **Filter** by type, status, or billing cycle using the dropdown filters
- **Switch views** using the table/card toggle at the top of the list — your preference is saved
- **Edit** any product using the edit button on its row or card
- **Toggle status** to activate or deactivate a product without deleting it
- **Select multiple** products to activate, deactivate, or delete them in bulk
- Products used in invoices, quotes, or packages cannot be deleted — deactivate them instead

Creating a Package

1. Click the **Packages** tab, then **New Package**
2. Give the package a name and optional description and category
3. Click **Add Product** to add items from your product catalog (at least one is required)
4. Set quantity for each item; optionally override the price for that item within the package
5. Set a fixed package price, or leave blank to use the sum of item prices
6. Optionally apply a discount (fixed dollar amount or percentage)
7. Click **Save Package**

Setting Up Tax Rates

1. Click the **Tax Rates** tab, then **New Tax Rate**
2. Enter a name (e.g. "California Sales Tax"), the percentage rate, and optionally a state/region
3. Check **Default rate** to auto-apply it on new quotes and invoices
4. Click **Save Tax Rate**

Use the **Quick Add** buttons to instantly add common US state tax rates (CA, NY, TX, FL, IL, PA, NJ, WA, GA, NC) without typing.

Tips

- Set one tax rate as the **Default** — it will be pre-selected when creating quotes and invoices; click the star icon next to any rate to make it the default
- Use **categories** to group related products (e.g. Photography, Design, Post-production)
- Packages show a **savings** amount when the package price is lower than the sum of individual items
- Products are shared across quotes and invoices — updating a product does not change past documents
- Products are shared across your entire company account and are available when creating any quote or invoice

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Projects

Projects

Manage all your projects and events in one place — from initial proposal to completed work. Track values, deadlines, venues, expenses, quotes, contracts, and invoices across your entire pipeline.

Key Features

- **Two Views**: Switch between a visual card grid (default) and a sortable list view
- **Clickable Stats**: Dashboard cards show Active, Proposed, In Production, and Completed project counts — click any card to instantly filter the view
- **Project Types**: Categorize work as Single Event, Multi-Day Event, Production, Rental, Service, Retainer, or Custom
- **Status Tracking**: Move projects through Proposed → Contracted → Planning → In Production → Completed (or On Hold / Cancelled)
- **Priority Levels**: Flag projects as Low, Normal, High, or Urgent
- **Payment Column**: The list view shows invoiced and paid amounts so you know where each project stands financially

- **Events**: Add individual event dates and times within a project (Ceremony, Reception, Rehearsal, Setup, Breakdown, Meeting, Performance, or Other)
- **Quotes**: Create and send quotes for a project; designate each as a primary quote or an option, and track status from Draft through Accepted
- **Documents**: Attach contracts, questionnaires, subcontracts, lead forms, and proposals — and generate invoices directly from signed contracts
- **Invoices & Payments**: View and create invoices tied to a project, and record payments directly (Stripe, PayPal, bank transfer, check, cash, Venmo, Zelle, or other)
- **Expense Tracking**: Log project expenses as Direct Expenses, Vendor Bills, or Resource Costs; categorize by equipment, labor, venue, travel, materials, subcontractor, software, insurance, or marketing; optionally link to a vendor and mark items as billable to the client
- **Budget**: Log project expenses (by type, category, and vendor); set annual revenue and expense targets; view a live profit/loss summary per project
- **Fullscreen Detail**: Expand any project detail panel to fullscreen for distraction-free review
- **Resources**: Assign team members or equipment to a project, track their confirmation status, and sync their costs to project expenses
- **Activity Log**: See a chronological record of actions taken on each project
- **Filtering**: Narrow results by status, project type, or priority in both card and list views
- **Search**: Find projects by name, description, venue name, or account name

How to Use

1. Click **New Project** to open the project form
2. On the **General** tab, enter the project name, linked account, type, status, priority, estimated value, primary contact, and description
3. On the **Dates & Venue** tab, set start date, end date, deadline, and venue details
4. On the **Notes** tab, add any internal notes
5. Click **Save Project** — the project appears in your card grid immediately
6. Click a project card (or the **eye icon** in list view) to open the full project detail panel, where you can manage:
    - **Events** — schedule specific dates and times within the project
    - **Quotes** — view linked quotes or create a new one; toggle any quote between primary and option roles
    - **Documents** — view contracts, questionnaires, subcontracts, lead forms, and proposals; generate an invoice directly from a signed contract
    - **Invoices** — view payment status, create a new invoice, or record a payment directly
    - **Resources** — see assigned team members or equipment and their confirmation status

   - **Activity** — review the full action history
   - **Budget** — log expenses by type and category; optionally link to a vendor and mark as billable; set annual targets and see your live profit/loss
7. Switch to **List View** (list icon in the toolbar) to see all projects in a sortable table with payment columns and event counts

Tips

- Click any **stat card** at the top to instantly filter projects by that status — click again to clear the filter
- Use the **toolbar filters** to narrow by status, type, or priority without leaving the main view
- Mark expenses as **Billable** to flag costs that should be passed on to the client when invoicing
- Use **Sync Resource Costs** on the Resources tab to automatically pull assigned team or equipment costs into the Budget tab
- The **Budget** tab shows estimated value, contracted value, total expenses, amount paid, and a live profit/loss — review it before sending a final invoice
- Click the **expand icon** in the project detail header to open the panel in fullscreen mode
- Filter by **Urgent** priority to surface the projects that need immediate attention

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Query Browser

Query Browser

The Query Browser lets platform administrators review all AI queries made by users, including the full prompt sent and the response received from Claude or ChatGPT.

Key Features

- **Query List**: Scrollable list of all AI interactions across the platform, sorted by most recent first
- **Filter by User**: Narrow the list to queries from a specific user
- **Filter by AI**: Show only Claude queries, only ChatGPT queries, or all
- **Search**: Find queries by keyword — searches both the prompt text and the response
- **Query Details**: Click any query to see the full prompt, the full AI response, and metadata

- **Template Tracking**: See which AI template was used when a query was sent via a template
- **Backup File Viewer**: View any backup file that was attached to an AI query
- **File Extraction**: Automatically detects files referenced in AI responses and lets you view or save them
- **Copy to Clipboard**: Copy the query or response text with one click
- **Save to Database**: Save extracted file content for future reference

How to Use

1. Open the Query Browser from the sidebar menu
2. The left panel loads the most recent 50 AI queries automatically
3. Use the **User** dropdown to filter by a specific team member, or **All APIs** to switch between Claude and ChatGPT
4. Type in the search box to find queries by keyword — results update automatically
5. Click any query in the list to view its full details in the right panel
6. In the detail view, scroll down to see the full prompt and the complete AI response
7. If the response contains file references, they appear under **Extracted Files** — click a file button to view its content
8. In the file viewer, click **Save to Database** to store the file, or **Copy Content** to copy it to your clipboard
9. Click **Refresh** at any time to reload the query list with the latest entries

Tips

- Files already saved to the database are shown with a green **Saved** badge in the extracted files list
- If a saved file differs from the extracted version, a **View Saved Version** button appears in the file viewer so you can compare them
- The version number badge on each query in the list indicates which iteration of the AI template was used
- Use the search box combined with an API filter to quickly locate a specific interaction

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Quotes

Quotes

Create and send professional quotes to clients, track their status, and convert accepted quotes into contracts or invoices.

Key Features

- **Quote List**: View all quotes with status, total value, account, item count, expiry date, and creation time at a glance
- **Status Tracking**: Follow each quote through its lifecycle — Draft, Sent, Viewed, Accepted, Declined, Expired, or Revised
- **Line Items**: Build quotes from custom items, catalog products, or pre-built packages
- **Sections**: Group line items into named sections to organize complex quotes clearly
- **Pricing Controls**: Apply per-item discounts, a quote-level discount (fixed or percentage), and tax rates
- **Taxable Items**: Tax applies only to items marked as taxable — set automatically when adding products from your catalog
- **Optional Items**: Mark line items as optional so clients can see add-on choices without inflating the total
- **Client Signature**: Capture the client's digital signature and signed name when they accept a quote
- **One-Click Conversion**: Turn an accepted quote directly into a contract or invoice
- **Duplicate**: Copy any existing quote as a new draft to speed up repeat work
- **Filter & Search**: Filter by status or search by quote number, title, or account name
- **Dashboard Stats**: See totals for Draft, Sent, and Accepted quotes plus the combined value of accepted quotes
- **Automation Triggers**: Accepted quotes can trigger automated workflows

How to Use

Create a Quote

1. Click **New Quote** in the top-right corner
2. Fill in the **Title** and select the **Account** (both required)
3. Optionally link a **Project** and **Contact** — selecting an account auto-populates available options
4. Set a **Valid Until** date and choose a **Pricing Tier** (Retail, Pro, Wholesale, or Custom)

5. Add an intro message, payment terms, terms & conditions, and a closing message as needed
6. Add **Internal Notes** visible to your team only — never shown to the client
7. Click **Save Quote**

Add Line Items

In the right panel of the quote editor:

1. Click **Custom Item** to add a freeform line item (Service, Product, Labor, or Expense)
2. Click **Product** to pick from your product catalog — taxable status and pricing are carried over automatically
3. Click **Package** to add a pre-built bundle — savings vs. individual items are shown
4. For each item, set the name, quantity, unit price, and an optional per-item discount
5. Use the **Section** field to group related items under a named heading
6. Check **Optional** to mark items as add-ons — excluded from the total unless selected

Send a Quote

- Open a draft quote and click **Send to Client**, or click the **Send** button directly from the quote list
- The quote status changes to **Sent**
- When the client opens the quote link, it moves to **Viewed**

After Acceptance

Once a client accepts a quote (with optional digital signature):

- Click **Convert to Contract** to create a draft contract pre-filled with all quote details
- Click **Convert to Invoice** to create a draft invoice with all line items carried over
- If you use Workflows, a quote acceptance can trigger automated follow-up actions

Manage the List

- Use the **Status** filter to view quotes by stage
- Click **Duplicate** on any row to copy a quote as a new draft (valid date resets to 30 days)
- Select multiple quotes and click **Delete Selected** to remove them in bulk

Tips

- Quote numbers are generated automatically in the format `QTE-YEAR-NNNN`
- Expiry dates shown in red indicate the quote has passed its valid date
- Optional items let you present upsell options without inflating the quoted total
- Tax rates are pulled from your configured tax rate list and applied only to taxable items
- A quote can only be converted once — the system prevents duplicate contracts or invoices from the same quote
- The **Revised** status is applied when a sent quote is updated, keeping a clear history of changes
- Links from a Project or Account page automatically pre-fill those fields when creating a new quote

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Quotes, Invoices & Contracts

Pilot's CRM includes a full financial document management system for quotes, invoices, and contracts.

Quotes:

- Create professional quotes with line items, pricing, taxes, and discounts
- Link quotes to contacts and accounts
- Track quote status: draft, sent, accepted, declined, expired
- Convert accepted quotes to invoices with one click

Invoices:

- Generate invoices from quotes or create standalone invoices
- Line items with quantity, unit price, tax rates, and discounts
- Track payment status: draft, sent, paid, overdue, cancelled
- Payment integration with Stripe for online payments
- PDF export for sending to clients

Contracts:

- Create and manage contracts linked to contacts or accounts

- Track contract status and expiration dates
- Attach documents and notes to contracts

Invoicing (Admin):

- System-level invoicing management for uber admins
- Overview of all invoices across all users
- Revenue tracking and financial reporting

Access: Quotes, Invoices, and Contracts are available to CRM client users with admin level. The Invoicing admin page requires uber admin access.

Reports

Reports

Get a clear view of your business performance with CRM analytics covering revenue, pipeline health, team activities, and sales conversion — all in one place.

Key Features

- **Time Period Filter**: Switch between 7 days, 30 days, 90 days, or 1 year to focus on the timeframe that matters
- **Overview Dashboard**: Eight key metrics at a glance — revenue collected, outstanding invoices, new accounts, new projects, win rate, average deal size, activities logged, and won/lost counts
- **Revenue Report**: Monthly revenue bar chart with breakdowns by top accounts (top 10) and project type
- **Pipeline Report**: See all active projects by stage (Proposed, Contracted, Planning, In Production, On Hold), broken down by project type, with an upcoming 90-day timeline and an aging list that flags stale items
- **Activities Report**: Track daily activity volume, task completion rate, activity types, and which accounts are getting the most attention
- **Conversion Report**: Monitor your full quote funnel (total → accepted → declined → expired), contract signing rate, average days to close, and monthly conversion trends over 12 months

How to Use

1. Open the **Reports** page from the sidebar
2. Select a **time period** using the buttons at the top (7 Days, 30 Days, 90 Days, 1 Year)
3. Click a **report tab** — Overview, Revenue, Pipeline, Activities, or Conversion — to switch views
4. Review the charts and tables; the page updates instantly when you change the period or tab

Tips

- Start with **Overview** to get a quick health check on your business before diving into specifics — the win rate circle gives you an instant read on project outcomes
- The **Pipeline** report highlights an aging list — any project sitting in Proposed or Planning status for more than 30 days is flagged in red, so you know where to follow up
- Use the **Pipeline upcoming timeline** to see which projects are scheduled to start in the next 90 days and plan your workload accordingly
- Use **Activities** to spot quiet periods and make sure key accounts are getting consistent attention
- The **Conversion** report's monthly trend table shows your quote acceptance rate over time, making it easy to see if your close rate is improving
- Revenue breakdowns by account and project type help you identify your most profitable client segments

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Resources

Resources

Manage all the people, equipment, and venues your business relies on — in one place. Resources can be assigned to projects and appointments, with rates and availability tracked throughout.

Key Features

- **Resource Types**: Organize resources into People (employees, subcontractors, vendors,

white label), Equipment (gear, vehicles), and Venues
- **At-a-Glance Stats**: Dashboard cards show total counts for People, Equipment, Venues, and Active resources
- **Quick Filters**: Switch between All, People, Equipment, and Venues with one click
- **Rate Tracking**: Store hourly and day rates per resource in your preferred currency (USD, EUR, GBP, CAD)
- **Assignment Count**: See at a glance how many projects or appointments each resource is linked to
- **Calendar Colors**: Assign a color to each resource for easy identification on calendars
- **Equipment Details**: Track serial numbers, purchase dates, condition, and quantity for gear and vehicles
- **Status Management**: Mark resources as Active, Inactive, or On Leave

How to Use

Add a Resource

1. Click **Add Resource** in the top-right corner
2. Enter the resource name and select a type (Employee, Subcontractor, Vendor, White Label, Equipment, Vehicle, or Venue)
3. Fill in contact details — email, phone, role or position
4. Set the status and optionally link to an Account or Contact
5. Switch to the **Rates** tab to enter hourly or day rates
6. For Equipment or Vehicle types, use the **Equipment** tab to log serial number, purchase date, condition (Excellent, Good, Fair, Needs Repair, or Retired), and quantity
7. Pick a calendar color at the bottom, then click **Save Resource**

Find a Resource

- Use the search bar to find by name, email, phone, role, notes, or serial number
- Use the **All / People / Equipment / Venues** buttons to narrow by category
- Use the filter dropdowns to refine by type, status, or equipment condition

Edit or Delete

- Click the **Edit** button on any row to update details
- Click **Delete** on a row to remove a single resource
- Select multiple resources with the checkboxes and use **Delete Selected** for bulk removal

Tips

- Link resources to your existing Contacts and Accounts to keep everything connected
- The **Assignments** column shows how often a resource is in use — great for spotting overbooked team members or equipment
- Use the **On Leave** status instead of deleting people who are temporarily unavailable
- Use the **Retired** condition for equipment that's no longer in service but should stay on record
- Assign distinct calendar colors to resources so they stand out when scheduling projects and appointments

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Safeboxes

Safeboxes

Safeboxes let you share a story from your media library with a recipient via a secure, time-limited link. Once the link expires, access is automatically revoked.

Key Features

- **Secure sharing**: Each safebox is tied to a specific story and sent to a specific recipient email address
- **Expiration control**: Every safebox has a set expiry date — after that date, the link becomes inactive
- **Status tracking**: See at a glance whether each safebox is Active or Expired
- **Full history**: All safeboxes are listed with the story name, recipient, creation date, and expiry date

How to Use

1. Select your DAM site from the top bar to load your safeboxes
2. The list shows all safeboxes for that site, sorted by most recently created
3. Click **New Safebox** to create a secure share link for a story
4. Choose the story you want to share and enter the recipient's email address
5. Set an expiry date — the recipient will lose access after this date

6. Click **View** on any row to see the details of an existing safebox

Understanding Status

- **Active** — the safebox link is still valid and the recipient can access the story
- **Expired** — the expiry date has passed and the link is no longer accessible

Tips

- Use safeboxes when you need to share content with someone temporarily, such as a client reviewing assets before a deadline
- Check the Expires column regularly to know when access will be cut off
- The list is always sorted with the most recently created safeboxes at the top, making it easy to find recent shares

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Service Manager

Service Manager

Control and monitor all background processes running on the Air4.media platform. Start, stop, schedule, and watch services in real time from a single screen.

Key Features

- **Service List**: View all services with live status (Running, Stopped, Error), resource usage, and uptime at a glance.
- **Start / Stop / Restart**: Control any service with one click. Buttons appear contextually — Stop and Restart only show for running services, Start only for stopped ones.
- **Batch Actions**: Select multiple services and start, stop, restart, or delete them all at once.
- **Real-Time Monitoring**: Open the Monitor panel for any service to see live CPU usage, memory consumption, I/O activity, and a live log stream with auto-scroll.
- **Script Editor**: Each service can have an associated script. Write or load an existing script directly in the built-in code editor.
- **Cron Scheduling**: Set up automatic schedules for any service using the Schedule tab. View

and manage all scheduled services from the Scheduled Services button.

- **Auto-Start on Boot**: Mark a service to start automatically when the server restarts.
- **Auto-Stop Timer**: Set a time limit (in minutes) after which a service will stop itself automatically. Set to 0 to run indefinitely.
- **Log Files**: Browse, view, clear, or delete log files for all services from the Log Files panel.
- **Crash Detection**: The system automatically detects crashed services and can restart them, with an alert shown in the interface.

How to Use

Create a Service

1. Click **New Service** in the top-right area.
2. Fill in the service name and description.
3. Optionally enable **Auto-start on system boot** and set an **Auto-stop** timer.
4. Switch to the **Script** tab to attach or write a script for the service.
5. Click **Save Service**.

Start, Stop, or Restart a Service

1. Find the service in the list.
2. Click **Start**, **Stop**, or **Restart** in the service row.

Monitor a Service

1. Click **Monitor** on any service row.
2. A panel opens showing live status, CPU, memory, I/O activity, and recent log output.

Schedule a Service

1. Open the service (click **Edit** or use the **Schedule** button).
2. Go to the **Schedule** tab and click **Configure Schedule**.
3. Set the cron timing and save.

View All Schedules

- Click **Scheduled Services** in the toolbar to see all configured cron jobs across all services.

System Tools

The **System Tools** menu provides platform-level checks:

- **Check WebSocket Status** — Verify the real-time connection service is running.
- **Restart WebSocket Service** — Restart the live-update connection if needed.
- **Verify Crontab Entries** — Confirm all scheduled services are correctly registered.
- **Verify Boot Services** — Check which services are configured to start on boot.
- **Test Server Permissions** — Run a permissions check to catch configuration issues.

Tips

- Use the **Status** and **Auto Start** filters at the top of the list to quickly find services by their current state.
- Search by name or description to locate a specific service quickly.
- The monitoring panel updates in real time — leave it open to watch a service during a critical operation.
- Always save a service before configuring its schedule; the Schedule tab requires a saved service ID.

Settings

Settings

Manage your profile, password, account security, and appearance preferences.

Key Features

- **Profile Management**: Update your display name shown across the platform
- **Password Change**: Update your login password at any time
- **Multi-Factor Authentication**: Add extra login security with one or more verification methods
- **Theme Selection**: Customize the look and feel of the interface

How to Use

Updating Your Profile

1. Go to **Settings** from the sidebar
2. Under **Profile**, update your name in the Name field
3. Click **Save Profile**

Your email address and phone number are read-only — contact support to change your email. Your phone number is set automatically when you configure SMS two-factor authentication.

Changing Your Password

1. Under **Password**, enter your current password
2. Enter and confirm your new password (minimum 8 characters)
3. Click **Update Password**

> This section only appears for standard accounts. Google sign-in accounts manage passwords through Google.

Setting Up Two-Factor Authentication (MFA)

The Security section shows four authentication methods you can enable independently:

Email Verification — A one-time code is sent to your email address each time you log in.

- Click **Enable**, then enter the 6-digit code sent to your email

SMS Verification — A one-time code is sent to your phone number.

- If you haven't added a phone number yet, click **Set Up** to add one first
- Click **Enable**, then enter the code sent by text message

Authenticator App — Use an app like Google Authenticator or Authy to generate codes.

- Click **Set Up** and follow the on-screen steps to scan a QR code with your app

Passkey — Log in with your fingerprint, Face ID, or a hardware security key.

- Click **Set Up** and follow the browser prompt to register your device
- You can register multiple passkeys (e.g. MacBook, iPhone) and manage them individually

- Click **Manage** to add, rename, or remove registered passkeys

To disable any active method, click **Disable** and verify your identity with your password or another active MFA method.

Changing Your Theme

1. Under **Appearance**, browse the available color themes
2. Click a theme card to select it — color swatches show the palette
3. Click **Apply Theme** to save — the page will reload with the new look

Some themes are marked **Seasonal** and may only be available at certain times of year.

Tips

- Enable at least one MFA method — the Security section will warn you if your account has none active
- You can have multiple MFA methods enabled at the same time for added flexibility
- Give your passkeys descriptive names (e.g. "Work MacBook") so you can identify them easily
- If you sign in with Google, use Google's account settings to manage your password and primary email

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Site Builder

Site Builder is a visual website builder within Pilot. Create, edit, and publish websites — no coding required.

Five Main Modes

- **Explorer**: Browse all pages as a card grid. Click any page to open the visual editor
- **Chart**: View your site structure as an interactive flowchart with a mini-map for navigating large sites. Status dots — green (published), gray (draft), blue (scheduled). Default view
- **Design**: Customize colors, fonts, branding, and layout
- **Modules**: Enable optional features like a blog, shop, or client portal
- **Menus**: Drag pages into your navigation locations

Page Management

1. Click **New Page** to add a page or folder
2. Right-click any page: edit, duplicate, add child page, preview, publish/unpublish, or delete
3. Drag pages in Chart mode to reorder your site structure
4. Click **Publish Site** to push all changes live at once

More Actions menu: scaffold a starter site, apply a template, generate a sitemap, import from a URL, import from HTML files, reset and re-scaffold, or browse version history.

Design Editor

Customize your entire site's visual identity from one place:

- **Templates**: Apply pre-built themes or save your current design as a reusable template
- **Site Identity**: Title, tagline, contact email, footer text, analytics ID, and social links
- **Branding**: Upload logo (regular and dark versions), favicon (32×64 PNG), and social share image (1200×630)
- **Colors**: Primary, secondary, accent, background, text, and border colors
- **Typography**: Choose from 15+ fonts; adjust size, line height, and heading weight
- **Shape & Spacing**: Border radius, section padding, and shadow presets (None, Subtle, Medium, Strong)
- **Custom CSS**: Add your own styles for advanced customization

A live preview pane with desktop, tablet, and mobile views updates in real time.

Modules Editor

- Toggle any module on/off and set its public URL path (e.g., /blog, /shop)
- Modules: **AirBlog**, **AirMail** (newsletter), **AirForms** (contact forms), **AirGallery**, **AirCatalog**, **AirBooking** (appointments), **AirShop** (e-commerce), **AirPortal** (client portal)
- **AirPortal**: Client portal with invoices, projects, contracts, documents, and messages by default; assets and catalog are optional add-ons
- **Portal Users**: Manage client accounts, send welcome emails, and reset passwords
- **URL Rules**: Generate and apply server rewrite rules for all active module paths with one click

Menus Editor

Drag pages into three navigation locations: **Top Bar**, **Sidebar**, and **Footer**. Give any item a custom display name, reorder by dragging, and click **Save Menus** when done.

AI Assistant

Click **Build with AI** in the toolbar. Enter your company name, industry, location, target audience, brand colors, and a description of your services. Upload logo files or paste asset URLs — Pilot auto-detects your logo. Optionally add up to three reference website URLs for design inspiration. Browse generated design variations, request additional variations from any saved design, and pick one before building.

Use AI to generate or rewrite individual pages with a text prompt.

> AI features use credits. Design generation costs 12 credits; a full site build costs an additional 15 credits (27 total). Page-level AI edits and generation use fewer credits. Your balance is shown before you confirm any AI action.

SEO Per Page

- **Title** and **description** fields with character counters and optimal range indicators
- Live **Google search preview** showing exactly how your page appears in results
- **Auto-generate** button to let AI write SEO metadata from your page content
- **Robots** and **canonical URL** controls for advanced settings

Publishing & Version History

- **Preview** any page before it goes live (desktop, tablet, mobile)
- **Publish** individual pages or the entire site at once
- **Generate Sitemap** creates an XML sitemap for search engines
- Click the camera icon to save a manual version snapshot at any time
- Browse past versions with thumbnails and restore any snapshot to roll back a change

Tips

- Use Chart mode to see your full site structure and mini-map before editing

- Set Design tokens first — all pages inherit your brand colors and fonts automatically
- Use **Scaffold Site** to generate a starter set of pages based on your site type
- Import an existing site directly from a live URL via **More Actions → Import from URL**
- The AirPortal module lets clients log in to view invoices, projects, and documents in one place

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Site Editor

Site Editor

A full-featured file manager and code editor for browsing, editing, and managing your site's files directly in the browser — no FTP or terminal required.

Key Features

- **File Explorer**: Browse the complete file tree, create files and folders, rename, move, and delete items
- **Multi-tab Editor**: Open multiple files at once in a tabbed code editor with syntax highlighting and drag-to-reorder tabs
- **Version History**: Every saved file is versioned — view past versions, compare changes, and restore any previous state
- **Bookmarks**: Save shortcuts to frequently visited folders for one-click navigation
- **Upload & Download**: Upload files from your computer, or download any file or folder as a zip archive
- **Image Editor**: Rotate, flip, crop, and resize images directly in the browser, then save in place
- **Pages Quick-Open**: Load all source files associated with any registered page in one click via the Pages dropdown (admin users only)
- **Environments**: Save and restore named sets of open tabs — useful for switching between different workspaces
- **AI Assistant**: Launch the built-in AI coding assistant in a side panel to get help writing or editing code

How to Use

Browsing Files

1. The left panel shows the file tree for the current directory
2. Click any folder to expand it and see its contents
3. Click any file to open it in the editor
4. Use the breadcrumb trail at the top to navigate back up

Editing Files

1. Open a file by clicking it in the file tree
2. Edit directly in the code editor — changes are highlighted
3. Click **Save** in the toolbar to save, or **Revert** to undo all unsaved changes
4. Click **Cancel** to close the file without saving

Managing Files

- Click the **file icon** in the explorer header to create a new file
- Click the **folder+ icon** to create a new folder
- Click the **upload icon** to upload files from your computer
- Right-click any file or folder for rename, move, download, and delete options

Version History

1. Open a file and click **Versions** in the toolbar
2. Browse the list of saved versions with timestamps
3. Click any version to preview it, then restore if needed

Bookmarks

1. Navigate to any folder in the file tree
2. Click the **bookmark icon** in the Bookmarks section to save it
3. Click a saved bookmark to jump directly to that folder

Environments

1. Open the files you want to work with across multiple tabs
2. Click **Environments** → **Save Environment** and give it a name
3. Later, select the same environment from the dropdown to restore those tabs

AI Assistant

- Click the **AI Assistant** button in the toolbar to open the assistant panel
- Ask it to write, explain, or fix code — it can save files directly to the editor

Tips

- Use the **Pages** dropdown (admin users) to instantly open all files for any page — it opens the PHP, view, JS, and CSS files together
- Bookmarks are saved per user, so your shortcuts persist between sessions
- Downloading a folder as a zip is a quick way to back up a section of your site before making large changes
- Regular users work in **Site Mode**, scoped to their active site's files only

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Site Management

Site Management

View and manage all sites on your platform — including web pages, digital asset libraries, and externally hosted DAM sites.

Key Features

- **Site List**: See all sites at a glance with their URL, type, status, SSL certificate state, FTP domain, AirMail status, owner, storage usage, and creation date
- **Search & Filter**: Find sites by name or URL, and filter by type (Page, DAM, External DAM) or status (Active, Suspended, Pending)
- **Add New Site**: Create a new site by providing a name, URL, type, and assigning an owner (admin only)
- **Edit Site Details**: Update a site's name, URL, type, status, and owner at any time
- **DNS Verification**: Check whether your domain is correctly pointed to the server before enabling SSL
- **SSL Certificates**: Provision, renew, or remove SSL certificates for any site once DNS is verified — with an auto-renew option

- **DAM Configuration**: Set up FTP domain and database connection for Digital Asset Management sites
- **Toggle Status**: Quickly activate or suspend a site with one click
- **Batch Actions**: Select multiple sites to activate, suspend, or delete them all at once
- **Site Editor**: Jump directly into the visual editor for active sites

How to Use

Add a New Site

1. Click **Add New Site** in the top-right corner
2. Enter the site name, URL (domain only, e.g. `mysite.com`), type, and owner
3. Set the initial status to **Pending**, **Active**, or **Suspended**
4. Click **Save Changes**

Set Up DNS & SSL

1. Open a site and go to the **General** tab
2. Under **DNS & SSL**, follow the instructions to add an A record at your domain registrar pointing to the server IP shown
3. Click **Check DNS** to verify the domain is correctly pointed
4. Once DNS is verified, click **Provision Certificate** to activate HTTPS
5. Enable **Auto-renew** to keep the certificate current automatically
6. Use **Renew Now** to force an immediate renewal, or **Remove SSL** to revoke the certificate

Configure a DAM Site

1. Open a DAM site and click the **DAM** tab
2. Enter the FTP domain and select the database to link
3. Enter the user table name and click **Test Table** to verify the connection
4. Optionally enable SSL for FTP access

Manage Site Status

- Click the **Toggle Status** button on any site row to switch between Active and Suspended
- To delete a site, it must be **Suspended** first — active sites cannot be deleted

Batch Operations

1. Check the boxes next to the sites you want to manage
2. Use the batch action toolbar to **Activate**, **Suspend**, or **Delete** all selected sites at once

Tips

- Sites of type **DAM V7 (External)** are tracked for billing only — use the **Open External** button to visit the site directly
- **Module Configuration** for DAM sites is managed in **Site Builder** → Modules mode
- The **Site Editor** button appears only for active, non-external sites
- Storage usage per site is shown in the list — useful for monitoring disk consumption
- DNS propagation can take up to 48 hours; run **Check DNS** again after waiting if it fails initially

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Startup Onboarding

Startup Onboarding

A guided 3-step flow to purchase and activate the Startup Package — giving you immediate access to Pilot Pro and the AI Investor Deck Generator.

What's Included

- **1 Year of Pilot Pro**: Full platform access for 12 months
- **200 AI Credits**: Use for deck generation, AI chat, and image creation
- **AI Investor Deck**: Claude-powered narrative builder for your pitch
- **Smart Data Pull**: Auto-fills your deck from your CRM data
- **Investor Link + PDF**: Share your deck online or export to PDF

One-time price: $499

How It Works

Step 1 — Your Business

1. Enter your **company name** (required)
2. Select your **industry** from the dropdown (optional)
3. Click **Continue to Payment**

Step 2 — Payment

1. Review what's included in the package
2. Enter your **card details** in the secure payment form
3. Click **Pay $499** to complete your purchase
4. Payment is processed securely via Stripe

Step 3 — You're All Set

Once payment is confirmed, your account is instantly provisioned:

- Your company profile is created
- Pilot Pro is activated for 12 months
- 200 AI credits are loaded into your account
- Your startup profile is ready to use

Click **Start Building Your Deck** to launch the AI Investor Deck Wizard.

Tips

- You can go back to edit your company name before completing payment
- Your payment is protected by a **30-day money-back guarantee**
- After activation, you'll be taken directly to the Startup Wizard to begin building your investor deck
- If you need to return to your dashboard instead, a link is available on the confirmation screen

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Startup Wizard

Startup Wizard

The Startup Wizard guides you through collecting all the information needed to generate a professional investor deck. Complete 8 focused steps at your own pace — your answers save automatically as you go.

Key Features

- **8-Step Guided Flow**: Covers every section investors want to see — from your business basics to your funding ask
- **Free Navigation**: Jump to any step at any time using the progress bar at the top — no need to complete steps in order
- **Auto-Save**: Your work saves automatically 3 seconds after you stop typing, and whenever you move between steps
- **Auto-Pull from CRM**: On the Traction, Revenue, and Team steps, click **Auto-Pull** to instantly import live data from your Pilot CRM
- **5 Deck Templates**: Choose a template in the sidebar — each produces a different layout and number of slides
- **Deck Branding Sidebar**: Customize your logo, brand colors (Primary, Secondary, Accent), and color theme — with a live preview
- **AI Logo Generation**: Generate 3 logo variations using AI based on your company name and industry — then pick your favorite
- **Multiple Decks**: Create separate decks for different audiences — each deck has its own isolated data profile

The 8 Steps

1. **Your Business** — Company name, tagline, industry, stage, founded date, and website
2. **Problem & Solution** — The problem you solve, your solution (up to 1,500 characters each), and your unique value proposition
3. **Market** — Target customer and market size (TAM, SAM, SOM)
4. **Product** — Product description, up to 6 key features, demo URL, and product stage
5. **Traction & Metrics** — Current clients, pipeline, MRR, ARR, and growth rate
6. **Revenue Model** — Revenue type, customer LTV and CAC, current revenue, burn rate, and runway
7. **Team** — Founder bio and LinkedIn, team members with roles, and advisors
8. **The Ask** — Raise amount, round type (Pre-Seed, Seed, Series A, Bridge), use of funds

breakdown, target close date, and existing investors

How to Use

1. Open the Startup Wizard from the Startup page
2. Fill in each step — required fields are marked with a red asterisk
3. On Steps 5, 6, and 7, click **Auto-Pull** to import data directly from your CRM
4. Use the **Deck Branding** sidebar to choose a template, set your logo, brand colors, and color theme
5. Use the progress bar at the top to jump between steps at any time
6. Click **Save & Exit** at any time to return to the Startup page without losing progress
7. When ready, go to Step 8 and click **Generate My Investor Deck**

Deck Templates

Select a template in the branding sidebar before generating — templates control layout and slide structure:

- **Classic** (12 slides) — Balanced bullet points, metrics, and charts. The standard YC/Sequoia format.
- **Pitch Perfect** (10 slides) — Bold headlines, minimal text, one powerful point per slide.
- **Data-Driven** (14 slides) — Heavy on charts and tables. Best for startups with strong metrics.
- **Storyteller** (14 slides) — Narrative-driven with emotional arc. Tells your startup story.
- **Startup Sprint** (12 slides) — Modern SaaS aesthetic with feature cards and icon grids.

Tips

- **Required to generate**: Company name (Step 1), Problem statement, Solution statement (Step 2), and Founder name (Step 7) must be filled before generating
- **AI Logo**: Click **AI Logo** in the branding sidebar to generate 3 variations — select the one you like best
- **Color Themes**: Choose from Modern Dark, Clean Light, Bold Gradient, or Minimal (separate from templates)
- **Use of Funds**: The percentage tracker on Step 8 turns green when your allocations add up to exactly 100%
- **Logo upload**: Upload a JPG, PNG, SVG, or WebP file under 5MB directly in the branding sidebar

- **Auto-Pull saves time**: If you already use Pilot for invoicing and client management, Auto-Pull can fill in traction and revenue data in one click
- **Multiple decks**: Create additional decks from the Startup Package page — each runs through the wizard independently

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Stats

Stats

The Stats page gives you a real-time overview of your DAM site's activity — showing summary counts across all content types and a live view of the file delivery queue.

Key Features

- **Summary Bar**: Displays total counts for Stories, Assets, Assets on S3, Accounts, and Downloads at a glance across the top of every AirDAM page.
- **Delivery Queue Monitor**: Shows all active file delivery destinations and how many files are waiting to be sent to each one, sorted by volume.
- **Destination Status**: Each destination shows whether it is Active, Off, or Stopped, so you can quickly spot delivery issues.
- **Error Tracking**: Highlights how many errors have occurred per destination, helping you identify problems before they escalate.
- **Queue Age**: Shows the oldest and newest pending task for each destination, so you can see if files have been stuck in the queue.
- **Destination Type**: Identifies whether each destination is an FTP Out channel or a Web In channel.
- **File Drilldown**: Click View Files on any destination to see every individual queued file — including its path, remote folder, status, and priority.
- **Queue Actions**: Activate or delete all pending tasks for a destination directly from the stats table.

How to Use

1. Select a DAM site from the topbar — the stats load automatically for that site.

2. The summary bar at the top shows total counts for key content types across the site.
3. The queue table lists every delivery destination that has pending files, sorted by the number of files waiting.
4. Check the **Status** column — destinations showing **Off** or **Stopped** are not delivering files.
5. Review the **Errors** column for any destinations with recurring failures.
6. Use the **Oldest** timestamp to identify destinations where files have been waiting unusually long.
7. Click **View Files** on a destination row to see the full list of individual queued files.
8. Use **Activate** to resume processing all queued tasks for a paused destination.
9. Use **Delete Tasks** to clear the entire queue for a destination (a confirmation prompt will appear).

Tips

- A destination with many pending files and a status of **Off** means delivery has been paused — check the Workflow settings to re-enable it.
- **Stopped** means the destination has no active account linked — check the FTP Out or Web In configuration in Workflow.
- The summary bar counts update each time you switch DAM sites — use it for a quick health check before diving into individual sections.
- Destinations with a high error count may indicate a credentials or connection issue on the receiving end.
- Use **Delete Tasks** only if you want to permanently discard queued files for a destination — this cannot be undone.

Stories

Stories

Browse and manage stories from your connected Digital Asset Management (DAM) site. Each story is a collection of media assets grouped under a single editorial or commercial subject.

Key Features

- **Story List**: View all stories with thumbnail, title, date, catalog, credit, source, and asset count at a glance
- **Exclusive Flag**: Stories marked as exclusive display a gold star badge
- **Asset Count**: See how many assets belong to each story directly in the list
- **Catalog Filter**: Narrow the list to stories from a specific catalog using the dropdown filter
- **Search**: Find stories by searching across title, description, credit, tags, or location
- **Story Detail**: Open a full detail view showing all story metadata and a scrollable grid of its assets
- **Asset Preview**: Click any asset thumbnail inside a story to view its full details — filename, keywords, location, credit, file size, and more
- **Stats Bar**: The top of the page shows live counts for total stories, assets, cloud-hosted files, accounts, and downloads

How to Use

1. Select a DAM site from the site selector in the top bar — the list loads automatically
2. Browse the story list, sorted by date (newest first) by default
3. Use the **Search** box to filter stories by keyword
4. Use the **Catalog** dropdown to show only stories from a specific catalog
5. Click column headers like Title, Date, or Assets to sort the list
6. Click **View** on any row to open the story detail panel
7. In the detail panel, scroll down to see all assets belonging to that story
8. Click any asset thumbnail to open its full metadata

Tips

- If no site appears, check that a DAM site is selected in the topbar site selector
- The stats bar at the top updates whenever you switch sites, giving a quick snapshot of the site's content
- Exclusive stories are visually flagged — useful when prioritising which content to promote
- Asset counts in the list update to reflect what is currently stored in the DAM database

Subscribers

Subscribers

Manage all newsletter subscribers across your AirMail sites — add, import, tag, and track engagement from one central list.

Key Features

- **Live Stats**: See your total subscribers, active count, how many have a phone number, and new sign-ups this month at a glance.
- **Smart List**: Browse and search subscribers with filters for site, status, source, and contact type. Sort by any column.
- **Tags**: Organize subscribers with custom tags for targeted campaigns. Add tags individually or in bulk.
- **Batch Actions**: Select multiple subscribers to export, delete, unsubscribe, resubscribe, add to lists, or manage tags all at once.
- **CSV Import**: Upload a CSV file to add or update large numbers of subscribers quickly.
- **WordPress Import**: Dedicated import flow for migrating subscribers from a WordPress newsletter plugin.
- **Export**: Download your full list or a filtered selection as a CSV file.
- **Engagement Tracking**: See open and click counts per subscriber directly in the list.

How to Use

Add a Subscriber

1. Click **Add Subscriber** in the top-right corner.
2. Select the site this subscriber belongs to (or choose "All Sites" for global).
3. Enter their email address (required), plus optional name and phone number.
4. Add tags by typing and pressing Enter, or click existing tags to apply them.
5. Set the status to Active or Unsubscribed.
6. Click **Save Subscriber**.

Import from CSV

1. Click **Import** to open the import dialog.

2. Select the target site.
3. Upload a CSV file with columns: `email`, `phone`, `first_name`, `last_name`, `tags`.
4. Choose options: update existing subscribers, resubscribe previously unsubscribed contacts.
5. Optionally add tags to all imported subscribers or assign them to a list.
6. Click **Start Import** and watch the progress bar.

Import from WordPress

1. Click **WordPress Import**.
2. Select the target site.
3. Upload the WordPress CSV export (columns: `email`, `first_name`, `last_name`, `subscribed`, `created_at`).
4. Click **Import from WordPress**.

Manage Subscribers in Bulk

1. Check the boxes next to subscribers (or select all).
2. Use the batch action buttons to: Export, Delete, Unsubscribe, Resubscribe, Add to List, Add Tags, or Remove Tags.

Filter the List

Use the filter dropdowns above the list to narrow by:

- **Site** — view subscribers for a specific site
- **Status** — Active, Unsubscribed, Bounced, Complained
- **Source** — how they subscribed (Import, Form, API, Manual, WordPress)
- **Contact Type** — Email Only, Phone Only, or Email & Phone

Tips

- Phone numbers should include the country code (e.g., +12025551234) for SMS compatibility.
- Tags are shared across your account — reuse them to build consistent segments.
- The **Engagement** column shows total opens and clicks, helping you identify your most active subscribers.
- Use **Export All** to back up your full list at any time before making bulk changes.
- Subscribers marked as Bounced or Complained are automatically excluded from future campaigns.

Template Management

Manage reusable content templates used across the platform for AI processing, code analysis, and system operations.

Key Features

- **Template Library**: Browse all templates in a sortable, searchable list with name, category, default status, and last updated date
- **Two Template Types**: Switch between Query Templates and Page Templates using the filter at the top of the page
- **Categories**: Organize templates into four categories — AI Processing, Code Analysis, System, and General
- **Default Templates**: Mark one template per category as the default, so it is automatically selected when that category is used
- **Full Content Editor**: Write or paste template content directly in a multi-line editor when creating or editing a template
- **Add, Edit, Delete**: Create new templates from scratch, update existing ones, or remove templates that are no longer needed

How to Use

Browse Templates

1. Open the **Template Management** page from the admin menu
2. Use the **Query Templates / Page Templates** dropdown to switch between template types
3. Click any column header to sort the list by name, category, default status, or last updated date

Add a New Template

1. Click **Add New Template** in the top-right corner
2. Enter a descriptive **Name** for the template
3. Select the appropriate **Category** (AI Processing, Code Analysis, System, or General)
4. Type or paste the template **Content** into the editor

5. Check **Set as Default Template** if this should be the default for its category
6. Click **Save Template**

Edit a Template

1. Find the template in the list
2. Click the **Edit** action on the right side of the row
3. Update the name, category, content, or default status as needed
4. Click **Save Template** to apply changes

Delete a Template

1. Find the template in the list
2. Click the **Delete** action on the right side of the row
3. Confirm the deletion

Tips

- Only one template per category can be the default — setting a new default will replace the previous one
- The **Last Updated** column helps you identify recently changed templates at a glance
- Use descriptive names so templates are easy to find as your library grows
- This page is accessible to platform administrators only

User Management

User Management

Create, edit, and manage all platform users. Control access levels, account status, and security settings from one central page.

Key Features

- **User List**: View all users with name, company, email, phone, category, level, status, and MFA indicators

- **Search & Filter**: Search by name, email, or company — filter by category, access level, or account status
- **Add New User**: Create accounts with full contact details, access settings, and MFA options (uber admins only)
- **Edit User**: Update any user's profile, permissions, status, and security settings
- **Toggle Status**: Quickly activate or suspend individual accounts
- **Batch Actions**: Activate, suspend, or delete multiple users at once
- **View As User**: Log in as any user to see the platform exactly as they do (uber admins only)
- **Role Templates**: View, configure, create, and delete permission templates for each role type (uber admins only)
- **Per-company Permissions**: Assign a specific role template to each of a user's companies individually

How to Use

Adding a User

1. Click **Add New User** in the top right (uber admins only)
2. Enter the user's full name and email (required)
3. Optionally add company name, phone, and address
4. Use **Search Address** to auto-fill address fields via Google Places
5. Set **Category**, **Level**, and **Status**
6. Enable MFA methods as needed — Email, SMS, or Google Authenticator
7. Click **Save Changes**

New users are created with a temporary password and a status of "New."

Editing a User

1. Click **Edit** on any user row
2. Update the desired fields
3. The right panel shows all companies for that user — use the dropdown next to each company to assign a role template
4. Click **Save Changes**

Changing Status and Deleting Users

- Click **Toggle Status** on a row to switch between Active and Suspended

- Select multiple users and use **Activate Selected** / **Suspend Selected** / **Delete Selected** from the batch menu
- You cannot change status or delete your own account

Viewing the Platform as Another User

Click **View As** on any user row (uber admins only). The platform reloads showing exactly what that user sees. Return to your admin view from the User Management page.

Managing Role Templates

1. Click the **Role Templates** tab (uber admins only)
2. Click any template card to open its permissions editor — toggle **View**, **Edit**, **Delete**, and **Export** per page, then click **Save Changes**
3. Click **Create Template** to add a custom template with a name, description, and plan tier
4. Click the delete icon on any custom template to remove it (system templates cannot be deleted; a template must be unassigned from all companies before deletion)

User Categories & Levels

Categories define which platform modules a user can access:

- **Uber** — Full platform access (internal team)
- **DAM Client** — Digital Asset Management only
- **CRM Client** — CRM only
- **Guest** — Limited access

Levels define what a user can do within their category:

- **Admin** — Full control including settings and user management
- **Editor** — Can create and edit content
- **User** — Read and limited interaction only

Tips

- Use the **Status** filter to quickly find all suspended or new accounts
- The MFA column shows at a glance whether two-factor authentication is enabled for each user
- Assign different role templates per company for fine-grained, company-level access control

- Batch actions skip your own account automatically — you cannot accidentally suspend or delete yourself
- Enabling Edit, Delete, or Export on a template page automatically enables View as well

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Webhooks

Webhooks

Connect your CRM to external apps and services by automating data exchange whenever key events happen in your account.

Key Features

- **Outbound Webhooks**: Automatically notify an external service (like Zapier, Slack, or a custom app) when something happens in your CRM.
- **Inbound Webhooks**: Receive data from external services into your CRM using a unique URL you share with the other service.
- **12 Trigger Events**: Choose exactly which event fires the webhook — from a new lead to a signed contract.
- **Custom Payloads**: Define what data gets sent using a flexible template with dynamic variables.
- **Test & Monitor**: Send a test payload at any time and track success and error counts per webhook.
- **Enable / Disable**: Toggle any webhook on or off without deleting it.

Trigger Events

Webhooks can fire on any of these events:

Event	When it fires
Lead Created	A new lead is added
Form Submitted	A contact submits a form
Quote Accepted	A quote is accepted

Event	When it fires
Contract Signed	A contract is signed
Invoice Paid	An invoice is marked paid
Invoice Sent	An invoice is sent
Appointment Booked	An appointment is scheduled
Status Changed	A contact status changes
Tag Added	A tag is added to a contact
Payment Received	A payment is recorded
Project Completed	A project is marked complete
Portal Message	A client sends a portal message

How to Use

Create an Outbound Webhook

1. Click **New Webhook**.
2. Enter a name and select **Outbound (we call them)**.
3. Choose the trigger event.
4. Enter the external service's endpoint URL and HTTP method (POST, PUT, or PATCH).
5. Optionally add custom headers (e.g., an authorization token) and a payload template.
6. Click **Save Webhook**.

Create an Inbound Webhook

1. Click **New Webhook**.
2. Enter a name and select **Inbound (they call us)**.
3. Choose the trigger event that this incoming data represents.
4. After saving, copy the generated **Webhook URL** and paste it into the external service.

Test a Webhook

Click the **Test** button (flask icon) on any outbound webhook to send a sample payload and confirm it's working.

Enable or Disable

Click the **Toggle** button to activate or pause a webhook without deleting it.

Tips

- Use **payload templates** with `{{contact.name}}` and `{{contact.email}}` style variables to send dynamic data.
- The **Errors** column highlights any delivery failures in red — click **Test** to re-verify the connection.
- Use the **Direction** and **Status** filters to quickly find a specific webhook in a long list.
- Inbound webhooks receive data from services like payment processors or form tools and map it directly into your CRM.

Workflow

Workflow

Manage the complete file delivery pipeline for your DAM site — from incoming uploads through processing rules to outbound distribution.

Key Features

- **FTP In**: Manage the FTP user accounts that receive incoming files from photographers, agencies, or automated feeds.
- **FTP Out**: Configure remote servers where processed files are sent after they pass through your pipeline.
- **Distribution Lists**: Define rules that link incoming sources to outgoing destinations, with optional delays and content-type filtering.
- **Processing Rules**: Set up automatic actions applied to incoming files — renaming, rotation, folder organization, and asset classification.
- **Web In**: Connect web upload portals to specific catalogs, so files submitted via the web are routed correctly.
- **Queue**: Monitor all outbound delivery tasks in real time, with status tracking for pending, processing, completed, and failed transfers.

How to Use

1. Select your DAM site from the topbar to load your workflow configuration.
2. Use the sub-tabs at the top of the page to navigate between sections.
3. In **FTP In**, click **New FTP User** to add an incoming feed. Use the Action filter to view users by routing type.
4. In **FTP Out**, click **New Destination** to add a remote server. Use the toggle icon on any row to enable or disable a destination without deleting it.
5. In **Distribution Lists**, click **New List** to map a source FTP user to a departure destination. Set a delay (in days) and choose whether the list handles photos, videos, or both.
6. In **Processing Rules**, assign automatic rename templates, rotation settings, and folder handling for each incoming FTP source.
7. In **Web In**, connect a web upload source to a catalog. Monitor the error count column to catch failed ingestions.
8. In **Queue**, use the status filter to focus on errors or pending transfers and track delivery progress.

Tips

- A delivery pipeline typically follows this order: FTP In → Processing Rules → Distribution List → FTP Out.
- Disabling an FTP Out destination (rather than deleting it) lets you pause delivery without losing the configuration.
- Check the **Queue** regularly — items stuck in "Error" status indicate a connection or permission issue on the destination server.
- Distribution Lists support a delay, useful when you need to embargo content before it reaches its destination.

Workflows

Workflows

Workflows let you automate repetitive tasks in your CRM. Set up rules that trigger automatically when something happens — like a form submission or a signed contract — and define a sequence of actions to run in response.

Key Features

- **Triggers**: Start a workflow based on real business events (form submitted, quote accepted, invoice paid, appointment booked, and more)
- **Multi-step Actions**: Chain multiple actions together — send an email, create a task, update a status, add a tag — all in one workflow
- **Templates**: Start from one of 5 pre-built workflow templates covering common business scenarios
- **Toggle On/Off**: Activate or deactivate any workflow without deleting it
- **Run Manually**: Trigger any workflow on demand using the Run Now button
- **Live Stats**: See how many times each workflow has run and when it last executed

How to Use

Create a Workflow

1. Click **New Workflow** to open the editor
2. Enter a name and optional description
3. Choose a **Trigger** — the event that starts the workflow:
    - Form Submitted, Lead Created, Quote Accepted, Contract Signed
    - Invoice Paid, Appointment Booked, Tag Added, Status Changed
    - Event Date Approaching, Scheduled, or Manual
4. Add one or more **Actions** (executed in order):
    - **Send Email** — send an email to the contact
    - **Send SMS** — send a text message
    - **Create Task** — add a follow-up task with a due date
    - **Change Status** — update the status of a project, quote, or contract
    - **Add Tag** — label the contact automatically
    - **Log Activity** — record a note or event in the CRM
    - **Send Quote** — dispatch a quote document
    - **Assign Resource** — allocate a resource to a project
    - **Wait** — insert a delay between actions
    - **AI Follow-up** — generate an AI-assisted follow-up message
    - **Webhook** — notify an external system

5. Click **Save Workflow**

Use a Template

1. Click **From Template**
2. Browse the available templates:
    - New Lead Follow-up
    - Quote Accepted → Contract
    - Contract Signed → Onboarding
    - Invoice Paid → Thank You
    - Appointment Booked → Confirmation
3. Click **Use Template** to pre-fill the editor, then customize and save

Manage Workflows

- **Edit** — modify any workflow at any time
- **Toggle** — switch a workflow active or inactive without deleting it
- **Run Now** — execute a workflow immediately for testing or one-off use
- **Delete** — remove workflows individually or select multiple and delete in bulk

Tips

- Use **variables** in email subjects and task titles to personalize content automatically — for example, `{{contact.name}}` inserts the contact's full name
- Keep workflows focused: one trigger, a clear sequence of actions
- Use the **Inactive** status to pause a workflow during busy periods without losing your setup
- Check the **Runs** and **Last Run** columns to confirm workflows are firing as expected