

The screenshot shows the Air4media Pilot v10 dashboard. At the top, there are three summary cards: 'TOTAL REVENUE' at \$38,900, 'OUTSTANDING' at \$18,900, and 'OVERDUE' at 0. To the right, a 'PAID' card shows 10 items. Below these is a table of invoices with columns for Invoice #, Client, Issue Date, Due Date, Total, Balance Due, Status, and Payment Options. The table lists 11 invoices, mostly from 'X17 Agency' and 'Air4.media Website', with various statuses like 'paid' and 'overdue'. A sidebar on the left contains navigation options like Dashboard, Site Builder, AirBlog, AirForms, AirGallery, AirCatalog, Airmail, CRM, AirChat, and Air4 Pilot. A bottom notification says 'Claude is active in this tab group'.

Invoice #	Client	Issue Date	Due Date	Total	Balance Due	Status	Payment Options	Actions
INV-20260203-6579	X17 Agency	2/3/2026	2/3/2026	\$1,850.00	\$0.00	paid	Card, ACH, Zelle, Check	[Icons]
INV-20260114-2568	Air4.media Website	1/13/2026	1/13/2026	\$20,000.00	\$0.00	paid	ACH, Zelle, Check	[Icons]
INV-20260109-5837	X17 Agency	1/9/2026	1/9/2026	\$1,850.00	\$0.00	paid	Card, ACH, Zelle, Check	[Icons]
INV-20251201-3262	X17 Agency	11/30/2025	11/30/2025	\$1,850.00	\$0.00	paid	Card, ACH, Zelle, Check	[Icons]
INV-20251106-5892	X17 Agency	11/5/2025	11/5/2025	\$1,850.00	\$0.00	paid	ACH, Zelle, Check	[Icons]
INV-20251002-9743	X17 Agency	10/1/2025	10/1/2025	\$1,850.00	\$0.00	paid	ACH, Zelle, Check	[Icons]
INV-20250902-3652	X17 Agency	9/1/2025	9/1/2025	\$1,850.00	\$0.00	paid	ACH, Zelle, Check	[Icons]
INV-20250801-4409	X17 Agency	7/31/2025	8/1/2025	\$1,850.00	\$0.00	paid	Card, Zelle	[Icons]
INV-20250701-7104	X17 Agency	6/30/2025	6/30/2025	\$1,850.00	\$0.00	paid	Card, Zelle	[Icons]
INV-20250618-8655	X17 Agency	6/17/2025	6/17/2025	\$23,900.00	\$18,900.00	over	Card, ACH, Zelle	[Icons]
INV-20250601-8880	X17 Agency	5/31/2025	6/4/2025	\$4,100.00	\$0.00	paid	Card, ACH, Zelle	[Icons]

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.