Pilot Documentation

Air4 Media — August 2026

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Getting Started

Dashboard

Dashboard

The Dashboard is your home page in Pilot — a live command center giving you an instant overview of your account, sites, activity, and plan usage the moment you log in.

Key Features

- **AI Greeting Banner**: A time-aware greeting ("Good morning, Laurent") with today's date and smart insight chips showing what needs attention — overdue invoices, pending payments, 30-day revenue, escalated chats, failed emails, new contacts, and more. Each chip is clickable and takes you straight 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 (e.g. active site count, queued emails, contacts added this week).
- **Quick Actions**: Shortcut cards for your most-used tools. Regular users see Site Builder, CRM, AirMail, Invoices, Assets, AirChat, AirForms, and Settings. Admin users see system tools: Domains, Billing, Users, Services, Knowledge Base, and more.
- **Pre-Flight Setup Card**: New accounts see a 3-step setup card for domain, email, and payments. Each step shows its current status with 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. Your current plan appears as a badge (e.g. "Business Class — $29/mo"). Green is healthy, yellow means plan ahead, red means act now.
- **Usage Warning Banner**: Appears automatically when any metric reaches 80% or more of its limit (turns red at 95%). Lists all affected metrics and links directly to Billing.
- **AirChat Activity Widget**: Shows a live summary of your chat conversations — active, awaiting, and escalated — when AirChat is enabled on your account.
- **Feedback Leaderboard**: Displays ranked 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 with 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 6-step spotlight walkthrough covering the Dashboard, Flight Instruments, Site Builder, CRM, AirMail, and Assets. 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.

Getting Started with CRM

Your CRM is where every person you do business with lives — leads, clients, suppliers and the history you build with each of them. If you are keeping any of that in a spreadsheet or an inbox today, this is what replaces it.

What it holds

- **Contacts** — everyone you deal with, with notes, tags and a full history of what has passed between you
- **Clients** — group contacts under the business they work for, so you can see the whole relationship rather than one person at a time
- **Pipeline** — a visual board of the deals you are working on, moved along stage by stage
- **Projects** — the work itself, tied back to the client it belongs to
- **Quotes, invoices and contracts** — priced, sent and tracked without leaving the record they belong to
- **Calendar and appointments** — bookings and meetings alongside everything else you know about that person

Your first hour

1. Start with **Contacts** and bring in the people you already work with — you can import a list rather than typing them in.
2. Group the ones who share an employer under a **Client**, so their history sits together.
3. Open **Pipeline** and add the deals currently in flight. Drag one between stages to see how it moves.
4. Create a **Quote** for a live opportunity. When it is accepted it becomes an invoice, so nothing is retyped.
5. Look at the **Clients Dashboard** at the end of the week — it shows what moved, what is waiting, and what is overdue.

Tips

- Log calls and meetings as you go. The value of a CRM is the history, and history is only built by small entries made at the time.
- Tag contacts by how you met them. It is the quickest way to learn which of your channels is actually working.
- A quote, an invoice and a contract all point back to the same client record — start from the

client, not from a blank document.

Getting Started with DAM

DAM stands for digital asset management. It is your media library: every photo, video and file you produce, kept in one place with the information that makes it findable later, and shared with clients through a portal that carries your branding rather than a generic download link.

What it holds

- **Assets** — the files themselves, with searchable details attached to each one
- **Stories** — a set of assets grouped under one subject, such as a shoot, a campaign or an event
- **Collections and catalogs** — the way you arrange stories for a particular audience
- **Lightboxes** — a shortlist you or a client build while reviewing, without moving anything
- **Safeboxes** — a secure, time-limited link for sharing outside your portal, which expires on its own
- **Downloads and logs** — who received what, when, and in which format

Your first hour

1. Upload a recent shoot into **Assets**. Bring in more than one file at a time — the library is built for batches.
2. Group them into a **Story** so they travel together and stay in context.
3. Put the story into a **Collection** so the right client sees it and nobody else does.
4. Invite one client into the portal and give them the access they need for their work.
5. Share a **Safebox** link with someone outside the portal and watch it expire on its own.

Tips

- Fill in the details when you upload, not later. A library is only as good as its search, and search only works on what you recorded.
- Use a story per shoot or event rather than per client. Clients change; the shoot does not.
- Check **Downloads** before you chase anyone. It usually shows the file was collected days ago.

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.

Getting Started with your Website

This is everything your audience sees: the site itself, and the tools that run on it — your blog, shop, galleries, forms, newsletters and booking pages. They share one design and one set of contacts, so a visitor who fills in a form on Monday is already a known contact on Tuesday.

What it holds

- **Site Builder** — build and edit pages visually, without touching code
- **AirBlog** — publish articles, with categories and comments

- **AirShop and AirCatalog** — sell products, or present a priced catalogue you can export as a PDF
- **AirGallery** — publish image galleries you can share or embed
- **AirForms** — capture enquiries, which arrive as contacts rather than as email you have to re-type
- **AirMail** — newsletters and campaigns to the subscribers you have gathered
- **Analytics** — what people actually did once they arrived

Your first hour

1. Open **Site Builder** and set your colours, fonts and logo once. Everything else inherits them.
2. Publish a home page and one page that explains what you do. Two good pages beat ten unfinished ones.
3. Add an **AirForm** to the second page so visitors have a way to reach you.
4. Turn on the module you will actually use this month — a blog, a shop or a gallery — and leave the rest off until you need them.
5. Check **Analytics** after a week and let it tell you which page deserves your next hour.

Tips

- Set the design before you build pages, not after. Changing it later means revisiting every page you have made.
- Every form submission becomes a contact, so your website feeds your CRM without you copying anything across.
- Switch modules on one at a time. An empty shop or a blog with no posts costs you more trust than not having one.

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 — no account required to browse.

Key Features

- **Four plan tiers**: Economy, Premium Economy, Business, and First Class — each named after a travel class and sized for different team needs.
- **At-a-glance plan details**: Every plan card shows exactly what's included — users, sites, contacts, monthly emails, AI credits, and storage.
- **All modules included**: Every plan includes the full feature set. There are no add-ons or per-feature charges.
- **Intro offers**: Select plans display a discounted introductory rate directly on the card. The reduced price is applied automatically at signup — no coupon needed.
- **Flying License**: A one-time startup package for $499 that includes 12 months of Business plan features plus the AI Investor Deck Generator — ideal for early-stage companies preparing to pitch investors.

How to Use

1. Browse the plan cards and compare what's included at each tier.
2. Look for an **intro offer** badge on a plan card if a promotional rate is available — the discounted price is shown automatically.
3. Click **Get Started** on the plan that fits your needs.
4. Complete the short onboarding wizard: enter your business details, confirm your plan, and add a payment method.
5. Your account is ready — you'll land on your dashboard and can start setting up right away.
6. Interested in the startup package? Click **Get Your Flying License** to learn more.

Tips

- The **Business plan** is highlighted as the most popular choice — a good fit for growing agencies that need more users, higher email volume, and expanded storage.
- All modules are always included on every plan — what changes between tiers is capacity, not features.
- The Flying License is the fastest path for startups that need investor-ready tools without committing to a monthly subscription.
- You can upgrade your plan at any time from your account settings.

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, phone number, and account type 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

DAM

Accounts

Accounts

The Accounts section lists every person who has — or has requested — access to your media portal. For ACME Creative Agency, this is your single place to see all portal users, control what each person can do, and approve or revoke access as your team and client roster changes.

Key Features

- **User List**: Each row shows the username, full name, company, email, access level badge, country, last active date, and account type.
- **Access Level Badges**: Each person carries a colour-coded badge showing the level of access you have given them, so you can see at a glance who can do what.
- **Approve Pending Accounts**: People who register themselves arrive awaiting your approval, with a dedicated **Approve** button. One click lets them in without opening the full edit form.
- **Add Accounts Manually**: Use the **New Account** button to create a portal user directly — no registration required.
- **Filter by Level**: Use the Level dropdown to narrow the list to a single level — useful when reviewing who currently holds which access.
- **Search**: Find any user by username, name, email, or company.
- **Edit & Delete**: Update any account's details or access level, or remove it entirely. Use checkboxes to delete multiple accounts at once.

How to Use

Approve a New User

1. Open the **Accounts** tab. Users waiting for approval appear with a yellow **Pending** badge.
2. Click **Approve** on their row — their access takes effect immediately.
3. To assign a different level first, click **Edit**, choose the level from the dropdown, and save.

Change a User's Access Level

1. Find the user in the list and click **Edit**.
2. Change the **User Level** field to the access this person should have.
3. Click **Save**. The badge on the row updates instantly.

Filter and Search

1. Use the **Level** dropdown to narrow the list to one level at a time and review who holds it.
2. Type a name, email, or company in the search box to find a specific user.

Remove an Account

1. Click **Delete** on any row and confirm to remove that user.
2. To remove multiple accounts, check the boxes and choose **Delete Selected** from the batch actions bar.

Tips

- Check **Pending** accounts regularly so new users are not left waiting for access.
- Use the **Level** filter to audit access before sharing a new asset batch — confirm only the right people can download.
- If a client should only view assets without downloading, lower their level rather than deleting their account — they keep their login but lose download access.
- The **Last Active** date on each row helps identify accounts that may no longer be in use — clean these up to keep your portal tidy.

CRM

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 & Status Filtering**: Use the Type and Status dropdowns in the list header to narrow results — filter by any activity type or by Pending vs. Completed.
- **Search**: Find any activity by searching its title or description.
- **Color-Coded Types**: Each activity type displays a distinct icon and color badge — purple for calls, blue for emails, green for tasks, amber for meetings, and more.
- **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, appointments).
- **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, Email Received, 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, or invoices, and when clients submit forms, book appointments, complete payments, or sign contracts — your history builds itself.
- Link activities to Accounts and Projects so the full timeline appears in those records too.

Features & Tools

After Party Landing

After Party Landing

The After Party landing page is the guest-facing experience your contacts receive after a photo event. Each guest gets a unique private link — for example, one texted to attendees after an ACME Creative Agency activation — that opens a branded page showing their event photo and inviting them to unlock an AI-styled version.

Key Features

- **Branded presentation**: The page displays ACME Creative Agency's logo and brand colors automatically. Guests immediately know who sent the link.
- **Photo and video delivery**: Guests see their event photo or video right on the page, with a one-tap button to save it to their device.
- **AI photo experience**: Guests enter their name and email to unlock an AI-transformed version of their photo. The result appears on the page and is also sent by text.
- **Contact card download**: After the AI reveal, guests are offered ACME Creative Agency's contact card to save directly to their phone in one tap.
- **Custom follow-up call-to-action**: A configurable button can send guests to a booking page, an offer, or any destination you choose — shown right after the AI result.
- **Star rating and Google review**: Guests rate their experience (1–5 stars), leave an optional note, and can post directly to your Google review page — without leaving the landing.
- **Newsletter sign-up**: After rating, guests are invited to join ACME Creative Agency's mailing list. Both ratings and subscriptions can be rewarded with a coupon code.
- **Event gallery**: When enabled, the page shows a browsable grid of AI photos from the full event so guests can explore the entire collection and open full-size shots.
- **Social links**: Your agency's social profiles — Instagram, Facebook, TikTok, LinkedIn, Pinterest, YouTube — appear in the page footer.

How to Use

1. Run a photo event; guests are captured at the booth or activation.
2. Each guest receives a unique link (typically by text) shortly after the event.

3. The guest opens the link on their phone and sees their photo, fully branded for ACME Creative Agency.
4. They enter their name and email to unlock the AI version of their photo.
5. Once submitted, the AI photo generates and displays. The guest saves it with one tap.
6. After the reveal, the guest can save ACME Creative Agency's contact card and follow the secondary call-to-action.
7. The guest rates the event experience and optionally subscribes to the newsletter to earn a reward coupon.

Tips

- Reward coupons for ratings and newsletter sign-ups are configured per event in your After Party settings.
- The Google review button only appears when a Google review link is set for the event.
- Enable the event gallery per event if you want guests to browse and open photos from the full collection.
- Guests who return to their link see their AI photo immediately, without re-entering any information.

Website

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, password-protected, or private.
- **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 design preset, 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 — filter by Pending, Approved, Spam, or Trash, then approve, reply, spam, or delete 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, color, and availability rules
- **Shareable Booking Links**: Each event type gets a unique public link you can share with clients or embed on your website — no account needed to book
- **Flexible Availability**: Set which days and hours you accept bookings per event type, with multiple time slots per day. New event types default to Monday–Friday, 9am–5pm
- **Buffer Times**: Add automatic buffer 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 (default 24 hours), and a daily cap
- **Approval Mode**: Optionally require your approval before a booking is confirmed
- **Confirmation Message**: Add a custom message shown to clients after they book
- **Appointment Dashboard**: View all upcoming appointments with client name, email, phone, and any notes they left
- **Stats Overview**: At-a-glance counts for active event types, today's bookings, upcoming, this week, completed, and cancelled

How to Use

Create an Event Type

1. Go to **AirBook** in the sidebar
2. Click **New Event Type**
3. On the **Details** tab: enter a name, description, duration (15 min to 2 hours), location type, and pick a color
4. On the **Availability** tab: adjust the days and times — click **Add Time Slot** to add multiple windows per day
5. On the **Settings** tab: set buffer times, booking window, minimum notice, daily cap, and whether approval is required
6. Click **Create**

Share Your Booking Link

1. On the **Event Types** tab, click the ⋮ menu on any event card
2. Select **Booking Link**
3. Copy the URL and send it to clients — anyone with the link can book directly

Manage Appointments

1. Click the **Appointments** tab to see upcoming bookings
2. Click the **eye icon** on any row to view full details: client name, email, phone, date, time, and notes
3. For **pending** appointments, choose **Confirm** or **Decline**
4. For **confirmed** appointments, choose **Complete** or **Cancel**

Manage Event Types

From the ⋮ menu on any event type card:

- **Edit** — update any settings at any time
- **Booking Link** — copy the shareable booking URL
- **Duplicate** — copy an event type with all its settings intact
- **Deactivate / Activate** — pause bookings without deleting the event type
- **Delete** — permanently removes the event type and all its associated bookings

Tips

- Set a minimum notice of at least a few hours to avoid last-minute surprises (24 hours is the default)
- Use different colors to tell event types apart at a glance
- Buffer time after appointments gives you breathing room before the next call
- The booking window controls how far ahead clients can schedule — 60 days is the default
- Deactivate an event type instead of deleting it if you want to reuse it later

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AirCatalog — Product Catalogs

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

Key Features

- **Catalog Management**: Create multiple catalogs with Draft or Published status. Duplicate a catalog to quickly spin up a variation, or archive ones you no longer need.

- **Product Editor**: Each product supports a name, SKU, price, sale price, custom price display text, 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. Visitors can filter the product grid by category, making large catalogs easy to browse.
- **Asset Integration**: Pick product images from your Assets library, or upload new files directly from the product picker. Filter by type — images, videos, documents, or audio.
- **Reordering**: Drag and drop products or categories to arrange them in any order.
- **AI Descriptions**: Generate product descriptions automatically — for all products at once or one at a time (3 credits per product).
- **PDF & CSV Export**: Download a formatted PDF for printing or sharing, or export all product data as a spreadsheet.
- **Sharing & Preview**: Generate a public link so clients browse a catalog without logging in. Preview the live catalog from the editor. Revoke access at any time.
- **Site Display**: Assign a catalog to one of your Airmail sites and control whether visitors see all catalogs or a specific one.
- **Display Settings**: Choose grid or list layout, number of columns, currency, default CTA label, and toggle visibility of prices, descriptions, variants, and the category filter.
- **Design Presets**: Apply a visual template to control the overall look and feel.

How to Use

1. Go to **AirCatalog** in the sidebar.
2. Click **New Catalog**, enter a name and optional description, then click **Create**.
3. In 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 full details: features, variants, tags, and a call-to-action link.
6. Use the **Categories** panel on the left to organize products into groups.
7. Open the **Settings** tab to configure currency, layout, columns, and display options.
8. When ready, go to **Sharing** to generate a public link, click **Preview** to review it live, or click the **PDF** button to download the catalog.

Tips

- Set a **Sale Price** to display the original price crossed out alongside the discounted price.

- Use the **Price Display** field to show custom text (e.g. "Call for pricing") instead of a numeric price.
- Use **Duplicate** from the catalog card menu to copy an entire catalog — great for seasonal or client-specific versions. ACME Creative Agency, for example, keeps separate catalogs for different service tiers without rebuilding from scratch.
- The **AI Descriptions** button generates copy for all products at once, saving significant time on large catalogs.
- Assign a catalog to a site from the site dropdown in the editor to make it appear on your public-facing storefront.

AirCoupon

AirCoupon

Create and manage discount coupons and promotional codes for your customers — either manually on demand or automatically through rules tied to other platform actions.

Key Features

- **Dashboard Overview**: See at a glance how many coupons are Active, Redeemed, Expired, and Revoked.
- **Manual Coupon Creation**: Generate a coupon instantly with full control over the discount, duration, recipient, and optional description.
- **Copy Code**: Click **Copy** on any coupon row to copy the code to your clipboard in one click.
- **Automated Rules**: Set up rules that automatically issue coupons when specific events happen — such as a customer submitting a review or subscribing to a newsletter.
- **Flexible Discounts**: Offer a percentage off (e.g., 20% off) or a fixed dollar amount (e.g., $10 off).
- **Transferable Coupons**: Allow recipients to share their coupon with a friend. The detail view shows who claimed it.
- **Revoke Coupons**: Cancel individual coupons or revoke multiple at once using batch selection.
- **Email Delivery**: Automatically send the coupon code to the recipient's email when creating manually.

How to Use

Creating a Coupon Manually

1. From the AirCoupon page, click **Create** in the coupon list toolbar.
2. Choose the **Discount Type**: Percentage (%) or Fixed Amount ($).
3. Enter the **Discount Value** (e.g., 15 for 15% off, or 10 for $10 off).
4. Set how many days the coupon is **Valid For** (default: 90 days).
5. Optionally add a **Code Prefix** to brand the coupon code (e.g., SUMMER → SUMMER-XXXX). Defaults to AIR if left blank.
6. Set the **Max Uses** — how many times the code can be redeemed.
7. Optionally enter a **Recipient Email and Name** to assign the coupon to a specific customer.
8. Optionally add a **Description** to note the purpose of the coupon (internal reference only).
9. Check **Transferable** if the recipient can share the code with someone else.
10. Check **Send coupon via email** to deliver the code to the recipient automatically.
11. Click **Create**.

Viewing a Coupon

Click **View** on any row to see full details: the code, discount, status, expiry date, usage count, source, recipient, and — for transferable coupons — who claimed it.

Revoking Coupons

- To revoke a single coupon, click **Revoke** on the coupon row.
- To revoke multiple coupons, select them with the checkboxes and choose **Revoke Selected** from the batch actions menu.

Setting Up Automated Rules

1. Click the **Rules** button (top right of the page).
2. Click **Add Rule** to configure a new automation.
3. Give the rule a **Name**, then choose the **Trigger**: AirReview (Review Submitted) or AirMail (Subscribed).
4. Set the discount type, value, duration, and optional code prefix.
5. For AirReview rules, optionally set a **Minimum Rating** — the coupon only fires when a review meets or exceeds that star threshold.
6. Check **Transferable** if the auto-generated coupon should be shareable.

7. Click **Save**. The rule is active immediately and runs automatically from that point on.

Rules can be deleted from the Rules panel at any time.

Tips

- Use **Code Prefixes** to make campaigns easy to identify — e.g., WELCOME, LOYAL, SUMMER.
- For ACME Creative Agency, an AirReview rule with a minimum 4-star rating is a great way to reward happy clients automatically.
- An AirMail **Subscribed** rule makes a strong welcome offer for new newsletter sign-ups.
- Revoked coupons stay visible in the list for your records — they simply can no longer be used.
- Use the **Copy** button to grab a coupon code instantly and paste it into an email or chat without opening the detail view.
- Check the **Redeemed** stat on the dashboard to track how many offers have been taken up.

DAM

AirDAM

AirDAM

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

Key Features

- **Portal Design Editor**: Opens by default — customize your DAM portal's look with theme presets, colors, branding, layout controls, and custom CSS. Changes are live-previewed before saving.
- **Theme Presets**: One-click presets (Dark Pro is the default) give you a polished starting point. The **Match Site** preset automatically inherits your main site's color palette for a unified look.
- **Branding**: Set a portal name, choose a font family, upload a logo (PNG/SVG/WebP), and add a watermark applied to client downloads.
- **Color Controls**: Fine-tune 11 individual colors — primary, accent, background, surface, card, text, and status colors — all with live preview.
- **Layout Controls**: Adjust card corner radius, grid spacing, and border opacity using sliders.
- **Custom CSS**: Add your own CSS rules for advanced styling beyond the built-in controls.
- **Device Preview**: Toggle between desktop, tablet, and mobile views to verify your portal before publishing.
- **Site Selector**: Switch between DAM sites from the topbar — all content and design settings update instantly.
- **Dashboard**: After selecting a site, a card grid summarizes all sections (Stories, Assets, Accounts, etc.) with live record counts.
- **Stats Bar**: Quick-glance totals for Stories, Assets, S3 uploads, Accounts, and Downloads.
- **Stories**: Browse photo and video stories with thumbnails, dates, catalogs, credits, tags, and exclusive flags.
- **Assets**: View media files with full metadata — headline, keywords, location, file size, and cloud vs. local storage status.

- **Accounts**: See everyone who has registered and what access they hold; approve pending accounts with one click.
- **Collections, Catalogs & Groups**: Browse asset collections, photo/video catalogs, and user permission groups.
- **Workflow**: Monitor FTP in/out queues, distribution lists, processing rules, web uploads, and the delivery queue.
- **Downloads, Safeboxes & Lightboxes**: Review download history, secure delivery packages, and user lightbox collections.
- **Newsletter**: View newsletter content items and distribution lists.
- **Stats**: Monitor delivery destinations — see pending file counts and errors; activate stalled tasks or clear error queues.
- **Logs**: Review distribution history by destination with date range filtering.
- **CSV Export**: Export any list with current filters applied for use in spreadsheets.

How to Use

1. Select a DAM site from the site selector in the top navigation bar
2. The **Portal Design** editor opens automatically — choose a preset, adjust branding, colors, and layout, then click **Save**
3. Use **Reset** to revert unsaved changes back to the last saved state
4. To browse site content, use the AirDAM section links in the sidebar (Stories, Assets, Accounts, etc.)
5. Click any row to open a detail panel with full information
6. In **Accounts**, click **Approve** on a pending account and choose the access it should have
7. In **Workflow**, use sub-tabs to monitor FTP jobs, processing rules, and the delivery queue
8. In **Stats**, click a destination row to see its queued files; use **Activate** or **Delete** to manage stuck tasks
9. 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
- Use the **Match Site** preset to pull your main site's color palette into the DAM portal automatically
- The **watermark** is applied to assets when clients download them — use a semi-transparent

PNG for best results

- Use the **device toggle** (desktop, tablet, mobile) to verify your portal looks right on all screen sizes before saving
- 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
- Each person you approve is given a level of access that controls what they can see and download — review what someone needs before approving them
- 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

Website

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 thumbnail previews (hover to zoom), category labels, file sizes, and last-modified dates.
- **Article Preview**: Read any article in a formatted panel, with a screenshot banner displayed at the top when one is available.
- **Screenshot Lightbox**: Click any thumbnail to view it full-size in an overlay — press Escape or click outside to close.
- **Retake Screenshot**: Refresh the screenshot for any 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 your AI assistant can answer questions based on the latest documentation.
- **Regeneration Control**: Flag all pages for fresh documentation — the KB Agent will rewrite outdated articles on its next cycle.
- **Public Docs Link**: Jump directly to the public-facing support site to see exactly what your users see.
- **PDF Export**: Download any individual article or the full documentation set as a PDF.

Dashboard Stats

Four cards at the top 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 currently queued for regeneration
- **KB Agent** — whether the documentation agent is running; its last heartbeat time appears in

the actions bar

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 toolbar and confirm.
7. To queue all pages for fresh documentation, click **Flag All Pages for Regeneration** and confirm.
8. Use **Download Full PDF** to export the entire documentation set, or click the PDF icon on any row for a single article.
9. Use **View Public Docs** to check the live support site as your users see it.

Tips

- Run **Sync KB** after any significant documentation update to keep AirChat accurate.
- The **Flagged for Update** count drops to zero once the KB Agent completes 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 camera button to add one.

AirEvents

AirEvents

AirEvents lets you create and manage events — from simple RSVP-only gatherings to fully ticketed conferences with pricing tiers, discount codes, and online payment. When published, each event gets its own branded public page where guests can register, buy tickets, and view the schedule.

Key Features

- **Event Dashboard**: See all your events at a glance, with live totals for RSVPs and tickets sold. For ACME Creative Agency, this might show an upcoming client showcase alongside a team-only workshop — each tracked separately.
- **Flexible Registration Modes**: Choose RSVP-only, paid ticketing, or both — depending on what the event calls for.
- **Ticket Tiers & Pricing**: Create multiple ticket types (Early Bird, General Admission, VIP) with time-windowed pricing that automatically changes on a date you set.
- **Discount Codes**: Generate codes for percentage off, fixed-dollar discounts, complimentary (free) tickets, or a set price — with optional limits on how many times each code can be used.
- **Guest List Management**: Add guests individually or import from a CSV file. Track RSVP status (confirmed, pending, declined) and party size. Send invitation emails in bulk or one at a time.
- **Agenda & Speakers**: Build a full session schedule with tracks and rooms. Add speaker profiles with photos and bios.
- **Sponsors**: Organize sponsors into named tiers (Gold, Silver, etc.) and display their logos on the public event page.
- **Attendee Check-In**: On event day, mark attendees as checked in from the Orders tab. For group purchases, buyers can assign names to each seat via a secure personalized link.
- **Team Collaboration**: Invite team members or external vendors to manage specific parts of an event — such as the speaker list or agenda — without giving them full account access.
- **Public Event Page**: Every published event gets a branded microsite covering the overview, agenda, speakers, sponsors, venue, and registration.

How to Use

1. Open **AirEvents** from the sidebar and click **New Event**.
2. Enter the event name, date, venue, and pick a registration mode (RSVP, Tickets, or Both).
3. Add a hero image, description, and SEO details so the public page looks polished.
4. Go to the **Tickets** tab to create ticket types and set pricing. Add time-based price windows (e.g., Early Bird ends August 31) if needed.
5. Use the **Discount Codes** tab to generate promo codes for clients, partners, or staff.
6. In the **Guests** tab, add your invite list and send invitations by email.

7. Build out the **Agenda** and **Speakers** tabs to give attendees the full picture.
8. Click **Publish** to make the event live, then share the public event URL with your audience.
9. On event day, use the **Orders** tab to check attendees in as they arrive.

Tips

- The **group discount** field applies a percentage off automatically when someone buys multiple tickets in a single order — great for team registrations.
- The stat cards on the dashboard are clickable: tap **RSVPs** to filter to events with confirmed responses, or **Tickets Sold** to sort by sales volume.
- For internal events where you don't want public sales, set the mode to **RSVP Only** and send invitations directly from the Guests tab.
- Collaborator invite links are event-scoped — they grant access only to one event and the specific sections you choose, keeping the rest of your account private.

AirForms — Form Builder

AirForms is a form builder and lead management tool. Build custom forms for your website, capture leads directly into your CRM, and track every submission — all from one place.

Key Features

- **Visual Form Builder**: Drag-and-drop builder with 21 field types — text, email, phone, number, URL, textarea, dropdown, radio buttons, checkboxes, multi-checkbox, hidden fields, file upload, image upload, date, time, rating, range slider, and layout elements like headings, paragraphs, and dividers
- **AI Form Generation**: Describe your business and goal and AI builds a complete form for you, including suggested fields and the reasoning behind each one (uses AI credits)
- **AI Submission Analysis**: Automatically score and analyze incoming leads, generate a personalized reply draft, and send it immediately or hold for your review
- **Approval Workflow**: Gate submissions before contacts are created or AI responses sent — review each one, add notes, then approve or reject
- **CRM Integration**: Auto-create contacts from submissions with field mapping. When someone fills out ACME Creative Agency's "New Client Inquiry" form, they appear in your contacts instantly

- **Contract Integration**: Attach a contract template so a signed document is generated automatically on submission
- **Subscription Integration**: Connect a form to an AirPlan so signups trigger a subscription — including Stripe Checkout for paid plans
- **Submission Inbox**: Browse all responses with status labels — New, Read, Replied, Archived, Spam — plus search, date filters, and CSV export
- **Email Notifications**: Get alerted when someone submits, and send automatic reply emails to submitters
- **Embed Anywhere**: Place forms on any website with a JavaScript snippet, or share a direct link
- **Spam Protection**: Built-in honeypot and submission limits block bots automatically
- **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 overrides available

How to Use

1. Go to **AirForms** in the sidebar
2. Click **New Form** to choose a template (Contact, Lead Capture, Registration, Survey, Order), or click **Generate with AI** and describe what you need
3. In the builder, drag fields from the left panel into your form, or click to add them
4. Click any field to edit its label, placeholder, required toggle, width, and CRM field mapping
5. Open the **Settings** tab to configure notifications, auto-reply, CRM integration, contract, subscription plan, and AI analysis
6. Open the **Design** tab to preview how the form looks with your site's branding
7. Click **Save**, then click **Embed** on the form list to get your website code
8. Click **Submissions** on any form to open the inbox and review responses

Managing Submissions

- Filter by status or date range, and search by content
- Open any submission to see all field values, metadata (IP, browser, referrer), and add internal notes
- Update status as you work through leads: New → Read → Replied → Archived
- Export all submissions to CSV for reporting
- Run AI analysis manually on any submission, or enable auto-analysis on every new one
- Approve or reject pending items before contacts or AI replies are created

Tips

- Use **Duplicate** to copy a form and test variations without starting over
- Use **Copy to Site** in batch actions to reuse a form across multiple sites
- Set a **Redirect URL** to send visitors to a thank-you page after submitting
- Enable **Approval Required** on AI responses to review the draft before it sends
- After AI generation, check the form summary — it explains the reasoning behind each field choice

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AirGallery — Image Galleries

AirGallery lets ACME Creative Agency create beautiful image galleries, share them publicly with a link, and embed them on any website. Use it to present client portfolios, share project proofs, and organize visual assets across multiple client sites.

Key Features

- **Gallery Dashboard**: Stat cards show total galleries, total images, published count, and shared galleries at a glance. Each gallery card displays its status (Published/Draft) with quick Edit, Share, and More actions
- **Flexible Layouts**: Choose Grid, Masonry, or Carousel with 2–6 columns, adjustable gap spacing, and aspect ratio options (Original, Square 1:1, 4:3, 16:9, 3:2)
- **Asset Uploads**: Drag and drop images, videos, audio, and documents (up to 100MB per file), or pick from your Asset Manager library. EXIF camera data, keywords, and copyright info are extracted automatically on upload
- **Image Ordering**: Drag images to reorder them in the editor; use bulk select to remove multiple at once. Star any image to set it as the gallery cover
- **Per-Image Details**: Set captions, alt text, credits, featured status, and visibility per image. View full EXIF data (make, model, ISO, aperture, GPS) in the image detail panel
- **AI Captions**: Generate captions for all gallery images at once with one click — uses AI credits from your account
- **Share Links**: Generate a public link with view-only, caption-editing, or full-edit access. Add optional password protection and an expiry date
- **Email Invitations**: Send a gallery link directly to a recipient's email with a personal message from the Sharing tab

- **Download Options**: Allow visitors to download individual images or the entire gallery as a ZIP file
- **Display Options**: Enable lightbox, captions, photo credits, EXIF data, watermarks, lazy loading, and choose pagination or infinite scroll
- **Style Controls**: Set background color, thumbnail size (small/medium/large), and hover effects (Zoom, Fade, Slide Up, or None)
- **Gallery Index**: Enable a public directory listing all published galleries for a site, with a custom URL, title, and description

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 media library
4. Drag images to reorder them; click any image to edit its caption, alt text, and visibility
5. Open the **Settings** tab to configure layout, columns, spacing, aspect ratio, and display options
6. Open the **Style** tab to set background color, thumbnail size, and hover effects
7. 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) without logging in
9. Set the gallery status to **Published** to make it live on your site

Tips

- Use **Duplicate** to start a new gallery from an existing one without rebuilding from scratch
- Enable **Download All** to let visitors save the full gallery as a ZIP — click **Rebuild ZIP** after updating images
- Set a share link expiry date for time-sensitive projects like event photos or client proofs
- Use **AI Captions** as a starting point, then refine individual captions in the image detail panel
- Assign each gallery to a site to keep work organized per client or project
- Enable the **Gallery Index** in the dashboard settings panel to create a public-facing directory of all active galleries for a site

Features & Tools

AirLaunch

AirLaunch

AirLaunch creates AI-generated investor pitch decks for your company, pulling in live data from your Pilot account to produce professional, ready-to-share presentations.

Key Features

- **Guided Wizard**: An 8-step wizard walks you through your company story — overview, problem, solution, market size, traction, team, and financials
- **5 Deck Templates**: Choose a style that fits your pitch — Classic, Pitch Perfect, Data-Driven, Storyteller, or Startup Sprint
- **Multiple Decks**: Create and manage several versions — for example, ACME Creative Agency could keep one deck for seed investors and another for strategic partners, each with its own content and template
- **Primary Deck**: Star one deck as your primary — it shows first in your list and on your public profile
- **Shareable Link**: Generate a trackable public link so investors can view your deck online — Pilot counts every view
- **PDF Export**: Download your deck as a PDF for email attachments or in-person meetings
- **Slide Regeneration**: Regenerate any individual slide for a different AI take — no need to rebuild the whole deck
- **Draft Mode**: Save your wizard progress and pick up where you left off
- **Deck Management**: Rename, duplicate, or delete any deck from the dashboard

How to Use

1. Go to **AirLaunch** from the sidebar
2. Click **Start Wizard** to begin the 8-step company profile setup
3. Fill in each step with your company details, market data, traction metrics, and team info
4. Choose a template and theme on the final step
5. Click **Generate Deck** — the AI builds your full presentation in seconds

6. From your deck view, use **Share** to get a trackable link or **Export** to download as PDF

Managing Your Decks

Once you have one deck, click **New Deck** (top right) to start a fresh wizard. Each deck keeps its own independent profile, so you can tailor the content per audience.

On any existing deck card:

- **View** — open the finished deck
- **Continue** — resume a draft in progress
- **Pencil icon** — return to the wizard to update and regenerate
- **Duplicate** — clone an existing deck as a starting point for a new version
- **Rename / Delete** — keep your deck list organized

Tips

- Complete all 8 wizard steps before generating — the more detail you provide, the stronger the AI output
- Use **Duplicate** to quickly create a variation without starting over (great for tailoring the same deck to different investor audiences)
- Set your most investor-ready deck as **Primary** so it's always front and center
- Share links track views — check back to see when investors open your deck
- If a single slide misses the mark, regenerate just that slide instead of rebuilding everything

Website

AirLink — URL Shortener

AirLink — URL Shortener

AirLink turns any long URL into a clean, trackable short link at air4.link. Whether you're sharing client proposals, media galleries, or campaign pages, every link is scoped to your account and tracks every click automatically.

Key Features

- **Short links at air4.link**: Every link gets a unique address like `air4.link/abc12345`, ready to share by email, text, or social media.
- **Click tracking**: See exactly how many times each link has been clicked. Your dashboard shows total links, active links, and a running click count across all your links.
- **Custom back-half**: Instead of a random code, choose a memorable slug — for example, `air4.link/acme-proposal` or `air4.link/summer-campaign`.
- **Story links**: When ACME Creative Agency publishes a media story through AirDAM, a short link is created automatically — no extra steps needed.
- **Enable or disable**: Pause any link instantly without deleting it. Disabled links stop working and can be re-enabled at any time.
- **Filter and search**: Filter by type (manual or story) and by status (active or disabled). Search by title or destination URL.

How to Use

Creating a short link:

1. Click **+ New Link** to open the create panel.
2. Paste the destination URL — the full address you want the short link to point to.
3. Optionally add a **title** to help identify the link in your list (e.g., "Cannes Proposal — June 2026").
4. Optionally enter a **custom back-half** (e.g., `summer-proposal`) to create a memorable URL. Leave it blank for a random code.

5. Click **Create Link**. Your new short URL appears immediately in the list.

Using your links:

- Click **Copy** on any row to copy the short URL to your clipboard.
- Click **Open** to preview the destination in a new tab.
- Click **Toggle** to enable or disable the link without deleting it.

Finding links:

- Use the search bar to find links by title or destination.
- Use the **Kind** filter to show only manual links or only auto-created story links.
- Use the **Status** filter to show only active or only disabled links.

Tips

- Use descriptive titles — when ACME Creative Agency has dozens of links, a label like "Cannes 2026 Proposal" makes it far easier to find the right one at a glance.
- Custom slugs are great for links you share in print or presentations — short and memorable beats random characters every time.
- Disabled links are preserved with their full click history intact. Re-enable them whenever you need them again.
- Story links are created automatically when you share a DAM story — check AirLink to see how many times clients have opened each one.

AirMail Sites

AirMail Sites

Your AirMail site is a branded, public-facing website where anyone can browse, read, and subscribe to your newsletters — no login required. For ACME Creative Agency, this site lives at **acme-creative.air4.media**.

Key Features

- **Newsletter Archive**: The home page lists all published newsletters with cover images, excerpts, reading times, and view counts. Readers search by keyword or filter by category — results update instantly. A "Load More" button appears when more issues are available.

- **Single Newsletter View**: Each newsletter opens as a full article with a reading progress bar at the top, author bio, and social sharing buttons — Facebook, Twitter, LinkedIn, WhatsApp, email, copy link, and print. Featured images can be videos that play directly on the page.
- **Previous / Next Navigation**: Readers move between issues without returning to the archive. A "More Newsletters" section at the bottom of each issue aids discovery.
- **Subscribe Form**: Visitors enter their email to subscribe. A confirmation email goes out immediately — no one is added to your list without clicking the verification link, which is valid for 15 minutes and resendable.
- **Profile Completion**: After verifying their email, new subscribers enter their first name, last name, and an optional phone number to finish signing up.
- **Subscriber Preferences**: A self-service page — linked in every email footer — lets subscribers update their name, add a phone number for SMS notifications, or unsubscribe at any time.
- **Unsubscribe Flow**: Before confirming, readers are offered alternatives such as updating preferences or reducing email frequency. If they proceed, they can optionally share why — useful feedback for understanding list health.
- **Referral Growth**: When a subscriber shares a newsletter link, new visitors see an inline prompt to subscribe, with referral tracking built in for word-of-mouth growth.
- **Three Themes**: Choose from **Modern** (gradient, glass-effect cards), **Editorial** (newspaper-style with serif fonts), or **Minimal** (clean, list-based layout) to match your brand.

How Subscribers Use Your Site

1. A visitor lands on acme-creative.air4.media and browses the newsletter archive.
2. They click **Subscribe**, enter their email address, and accept your privacy policy.
3. A confirmation email arrives — they click the verification link (valid for 15 minutes).
4. They enter their first name, last name, and optional phone number to complete their profile.
5. They're now subscribed and can read all your published newsletters.

Managing Subscriber Preferences

Subscribers click the preferences link in any email footer to:

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

Tips

- Choose a theme that fits your brand — **Editorial** suits content-heavy publications; **Modern** works well for bold, design-forward brands; **Minimal** is ideal for clean, professional newsletters. Preview before going live from the AirMail dashboard.
- Reading time is calculated automatically from word count — no setup needed.
- Social sharing buttons on every newsletter help grow your audience organically.
- Your site URL is set in **AirMail → Design Settings**. Keep it short and easy to remember.

AirMembers

AirMembers

AirMembers is your live membership roster — a filterable view of every member across all your plans. Monitor renewals, reach lapsing members, send campaigns, and import a historical list from a spreadsheet.

Key Features

- **Renewal stats**: Five cards show Total, Active, expiring within 30 days, expiring within 90 days, and already Expired — your renewal snapshot the moment you open the page.
- **Sortable roster**: Each row shows name, email, organization, plan, role, board position, status, expiry date, how they joined, dues amount, and billing cadence. Click any column to re-sort.
- **Smart filters**: Narrow by plan, board vs. non-board, status (Active, Past due, Cancelled, Paused, etc.), billing period, acquisition source, or expiry window — next 30, 60, or 90 days, or already expired.
- **Per-row actions**: **Edit person** opens the contact record; **Edit membership** adjusts their plan, status, or renewal date.
- **Batch actions**: Select multiple members, then **Send message** to reach the group or **Export CSV** to download the filtered set.
- **Send Campaign to Members**: Creates a pre-addressed Airmail draft for all members — finish composing and schedule it from Airmail Campaigns.
- **CSV import**: Upload a legacy member spreadsheet, map columns, set defaults, and import.

Duplicates are always skipped.

How to Use

1. Open **AirMembers** from the sidebar. The stat cards load your renewal snapshot immediately.
2. Use the filter dropdowns — Plan, Board, Status, Billing, Source, and Expiry — to focus on a segment. For example, choose "Expiring next 30 days" to see everyone due for renewal soon.
3. Type a name, email, or organization in the search box to find a specific member.
4. Click **Edit membership** to adjust a subscription; click **Edit person** to update contact details.
5. Check boxes next to multiple members, then choose **Send message** or **Export CSV** from the batch bar.
6. Click **Send Campaign to Members** to create a draft Airmail campaign for your full membership.

Importing Members

1. Click **Import Members** (top right) and select your CSV file — first row must be column headers.
2. Click **Upload and Preview**. The importer auto-maps recognized column names like "email," "expires," and "membership type."
3. Adjust any mappings, pick a default plan for rows without one, set the default status, and choose whether imported members get portal access.
4. Click **Run Import**. A summary shows records added, duplicates skipped, and any rows that failed.
5. Click **Done, Refresh List** to see your updated roster.

Tips

- Running the same CSV twice is safe — existing members are detected and skipped automatically.
- Filter to "Expiring next 30 days," select all, and hit **Send message** for a fast renewal nudge.
- The Board filter lets you reach governance members separately from your general membership.

AirPage

AirPage

AirPage lets you build beautiful storytelling pages for your website — landing pages, showcase pages, case studies, and more. Each page is built around a hero image, a tagline, and a series of content chapters. It's designed for narrative and brand pages, not product listings or pricing.

Key Features

- **Page Grid**: See all your pages at a glance with cover photos, status badges (Draft, Published, or Archived), chapter counts, and last-edited dates.
- **Template Picker**: Start every new page from a template — choose from system templates with pre-built chapter layouts, use one of your own saved templates, or begin with a blank page.
- **Hero Image**: Set a wide landscape photo at the top of the page, chosen directly from ACME Creative Agency's media library.
- **Chapters**: Build the page body with chapters — each with a title, rich text, and an optional image. Chapters stack top-to-bottom on the published page.
- **Chapter Presets**: Apply one-click layout presets: Storytelling (auto-alternating image/text), Stacked Image, Quote/Hero, Spec Card, Showcase, or Brand Callout.
- **Layout Controls**: Fine-tune each chapter's image position (left, right, full width, text only, image only), background color, and text alignment independently.
- **SEO Settings**: Set a custom page title, meta description, and social sharing image for each page.
- **Save as Template**: Turn any finished page into a reusable template for future campaigns or client showcases.
- **Duplicate**: Copy any existing page to use as a starting point.
- **Preview**: Open the live preview in a new browser tab before publishing.

How to Use

1. Open **AirPage** from the sidebar. You'll see all existing pages for your site.
2. Click **New Page** (or the dashed card in the grid) to open the template picker.
3. Enter a page name — for example, *ACME Creative — Brand Story* — then select a template or choose **Blank Page**.

4. Click **Create page** to open the editor.
5. In the **Basics** tab, set the page name, URL slug (the address visitors see), tagline, hero image, and status.
6. Switch to the **Chapters** tab and click **Add chapter** to start writing. Each chapter has a title, body text, and an optional image.
7. Click a **Block style** preset to quickly set the chapter's visual layout — try *Storytelling* for a natural alternating image/text flow.
8. Open the **SEO** tab and fill in the title and description for search engines and social shares.
9. Click **Save**, then **Preview** to review how the page looks on your site.
10. Set the status to **Published** and save when you're ready to go live.

Tips

- Wide landscape photos work best for hero images and chapter images.
- The **Storytelling** preset on most chapters automatically alternates images left and right — it reads naturally on any device without extra configuration.
- Save a polished page as a **template** so the structure is ready for future campaigns or new client landing pages.
- Pages stay in **Draft** until you explicitly publish them — you can work at your own pace without anything going live.
- Archiving a page removes it from your grid view but does not permanently delete it.

AirPlan

AirPlan

Create and manage the pricing plans for your business, then track who is subscribed to each one. ACME Creative Agency uses AirPlan to offer Starter, Professional, and Enterprise tiers — each with its own pricing, features, and subscriber list.

Key Features

- **Plan Types**: Build Subscription Plans, AI Credit packages, or Storage add-ons
- **Flexible Billing**: Support monthly, annual, one-time, and free billing on each plan

- **Multi-currency**: Set each plan's currency (USD, EUR, GBP, CAD, AUD)
- **Trial & Intro Offers**: Offer free trial periods and limited-time discounted pricing
- **Plan Features**: Define a feature list per plan with icons, values, and types — directly in the plan form or via the Features tab
- **Signup Form Link**: Connect an AirForm as the signup page so your pricing CTA sends visitors directly to your custom form
- **Subscriber Management**: Record and track who is subscribed, at what price, and in what status
- **Payment History**: View a subscriber's full payment history and retry failed payments in one click
- **Dashboard Stats**: See total plans, active plans, and monthly recurring revenue at a glance

How to Use

Create a Pricing Plan

1. Go to **AirPlan** and click **New Plan**
2. Select the **Plan Type**: Subscription Plan, AI Credits, or Storage
3. Enter a plan name — the URL slug is generated automatically
4. Add an optional tagline and description for the plan card
5. Set pricing — entering a monthly price auto-fills the annual price (10× monthly); override if needed
6. Choose a **billing period**: Monthly, Annual, One-time, or Free
7. Select a **currency** and optionally set **trial days**
8. Configure an **intro offer** — a percentage discount for a set number of months
9. Pick a **highlight color** and optional icon to visually differentiate the plan
10. Toggle **Popular** to show a badge; toggle **Featured** to highlight the plan on pricing pages
11. Toggle **Active** to control visibility; optionally link an **AirForm** as the signup page
12. Add features in the **Features** section at the bottom, then click **Save Plan**

Manage Plan Features

Features can be added in the plan form or in the dedicated **Features** tab.

1. Click the **Features** tab and select a plan from the dropdown
2. Click **Add Feature** — pick a preset key (users, storage, contacts, emails, AI credits, etc.) or enter a custom one; the label and icon fill in automatically
3. Adjust the label, optional value, and icon as needed

4. Set the **type**: Boolean (yes/no), Limit (Total, Monthly, Lifetime, One-time), or Text
5. Toggle **Included** to mark the feature as included or excluded
6. Drag rows to reorder, then click **Save Features**

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

Track Subscribers

1. Click the **Subscribers** tab and then **Add Subscriber**
2. Enter the subscriber's name and email, then select a plan, billing period, amount, and currency
3. Set the subscription start/end dates and status: Active, Trialing, Paused, Past Due, or Cancelled
4. Add optional notes
5. To view payment history or retry a failed payment, open the subscriber and scroll to **Payment History**
6. To cancel a subscription, click **Cancel** on the subscriber row and confirm

Tips

- Leave the annual price blank — it auto-calculates as 10× the monthly rate
- Mark your most popular plan with the **Popular** toggle to highlight it on pricing pages
- Use **Limit (Monthly)** for recurring usage caps (emails, AI credits) and **Limit (Total)** for hard caps (users, sites)
- Link an AirForm to capture custom signup fields beyond the default registration flow
- Archive old plans instead of deleting them to preserve subscriber history

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AirPortal

AirPortal

AirPortal gives your clients their own private portal where they can log in to view projects, invoices, contracts, documents, and send you messages — all without needing access to your Pilot account.

For ACME Creative Agency, this means clients like Riverside Hotel or Northside Brewing can check the status of their campaigns, download their latest deliverables, and reach out — any time, from anywhere.

Key Features

- **Portal dashboard**: Four summary cards show how many client accounts have portal access, how many individual users are active, unread messages waiting for your reply, and recent login activity — all at a glance.
- **Account list**: Browse every portal-enabled client account in one table. Each row shows the account name, a user count badge, and an Active status indicator. Use the search bar to filter by name.
- **Per-contact access control**: Grant or revoke portal access for individual contacts within an account — managed through the CRM. Only the people you choose can log in.
- **Password management**: Reset a contact's portal password from the CRM — the system generates a secure temporary password you can share with them.
- **Two-way messaging**: Clients can send messages from inside their portal, and you can reply directly from Pilot. Unread messages are tracked on the dashboard so nothing gets missed.
- **Welcome emails**: Send a branded welcome email to a new portal user from the CRM portal settings.

How to Use

1. Open **AirPortal** from the sidebar. The dashboard shows four summary cards: Portal Accounts, Portal Users, Unread Messages, and Recent Logins.
2. The **Portal-Enabled Accounts** table lists every client account with portal access turned on. Type in the search box to filter by name.
3. If no accounts appear yet, click **Manage in CRM** to get started — you'll enable portal access from CRM Integrations.
4. To manage an existing account, click the **gear icon** on its row — this takes you directly to CRM Integrations where you can add users, toggle access, and manage passwords.
5. To invite a new portal user: find their contact in the CRM, enable portal access, set a

temporary password, then share their unique portal login URL.

6. The client can log in immediately to view their projects, invoices, and documents.
7. Check the **Unread Messages** card on the dashboard regularly to stay on top of client questions.

Tips

- Portal access is per-contact — you can give one person at a client company access while keeping others out.
- A client's portal URL stays the same even if you reset their password.
- All detailed portal configuration (users, passwords, links, welcome emails) is managed through **CRM Integrations** — the gear icon on each account row takes you there directly.
- Enabling portal access for a contact automatically tags them as a portal user in your CRM, making it easy to filter your contact list.

AirReview

AirReview

Collect, moderate, and showcase customer reviews and testimonials — all in one place.

Key Features

- **Review Dashboard**: Six stat cards show your average rating plus live counts for total, pending, approved, featured, and rejected reviews at a glance.
- **Review List**: Each row shows the reviewer name, star rating, a preview of their comment, the submission source (direct link, QR code, email campaign, or embed), and current status.
- **Google Column**: A Google icon appears next to any reviewer who clicked through to post on your Google Business profile — so you can see who followed through.
- **Review Detail**: Open any review to read the full comment, see reviewer name, email, display name, source, submission date, and Google click status.
- **Moderation**: Approve, reject, feature, or delete reviews individually from the detail panel — or select multiple reviews and act in bulk.
- **Google Reviews Integration**: After a customer submits a review, prompt them to also post

it on your Google Business profile to boost your public reputation.

- **Auto-Approve**: Automatically approve reviews that meet a minimum star rating, so high ratings go live instantly without manual intervention.
- **Email Notifications**: Get notified by email every time a new review is submitted.
- **Review Page Branding**: Customize the title, intro text, and thank-you message shown to customers on your public review submission page.

How to Use

Moderating Reviews

1. Open **AirReview** from the sidebar.
2. The stats row shows your average rating and review counts by status — for example, ACME Creative Agency might see a 4.7 average with 3 reviews pending.
3. Each list row shows the reviewer name, star rating, a comment snippet, the submission source, and current status.
4. Click **View** on any row to open the full review detail.
5. From the detail panel, click **Approve**, **Feature**, **Reject**, or **Delete**.

Bulk Actions

1. Check the boxes next to multiple reviews.
2. Use the batch action menu to **Approve**, **Reject**, or **Delete** all selected reviews at once.

Configuring Settings

1. Click the **Settings** button in the top-right corner.
2. **Google Reviews** — Enter your Google Place ID and business name. Enable the "Post on Google" prompt to invite customers to also leave a public Google review after they submit.
3. **Moderation** — Turn on auto-approve and set the minimum star rating required (e.g., 4+ stars go live automatically).
4. **Notifications** — Enable email alerts and enter the address where new review notifications should be sent.
5. **Review Page Branding** — Set the page title, intro text, and the thank-you message customers see after submitting.
6. Click **Save Settings**.

Tips

- Use **Featured** status to highlight your best reviews — featured reviews can be displayed prominently on your website.
- Enable the Google prompt to turn happy customers into public Google reviewers without any extra effort.
- Set auto-approve to 4+ stars to keep your moderation queue light while still reviewing anything lower manually.
- Check the Google column in the list to see which customers followed through to post on Google.

AirShop

AirShop

AirShop is your complete e-commerce store manager. Sell products with tiered pricing, manage orders from purchase to delivery, run a reseller program, and track performance — all from one place.

Key Features

- **Dashboard Stats**: Active products, drafts, total orders, and revenue at a glance
- **Tiered Pricing**: Set Retail, Pro, and Cost prices per product — plus a Compare At price for highlighting discounts
- **Product Variants**: Offer size, color, material, or any custom option with individual prices and stock
- **Order Lifecycle**: Move orders from Pending through Confirmed, Processing, Shipped, and Delivered with automatic shipping notifications
- **Customer Tiers**: Segment buyers as Consumer, Pro, or VIP with an optional Pro approval workflow
- **Coupon Engine**: Create percentage, fixed-amount, or free-shipping discounts with usage limits, expiry dates, and customer-tier restrictions
- **Reseller Storefronts**: Give approved resellers a branded storefront with custom commission rules and pricing strategies

- **Reviews**: Collect and moderate star-rated product reviews before they go live
- **Analytics**: Track revenue trends, top products, order status breakdown, and customer tier distribution

How to Use

Products

1. Go to the **Products** tab and click **New Product**
2. Enter the name, SKU, type (Physical, Digital, Service, or Bundle), and description
3. Set your **Retail Price** — add Pro, Cost, and Compare At prices as needed
4. Enable **Track Inventory** to manage stock and set a low-stock alert
5. Add photos, videos, or documents under the **Media** tab
6. Use **Variants** for products with multiple options (e.g., "Size: 8x10" or "Material: Vinyl")
7. Use the right 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 — stats at the top show Pending, Processing, and Shipped counts
2. Click an order to see items, totals, shipping, billing, and payment details
3. Update the status (Confirmed → Processing → Shipped → Delivered) as you fulfill it
4. Click **Add Tracking** to enter a tracking number and carrier — a shipping email goes out automatically
5. Use the **Notes** section to leave internal comments on an order

Customers

1. Open the **Customers** tab to browse all buyers
2. Click a customer to view their order history, total spent, and contact details
3. Set their **Tier** (Consumer, Pro, or VIP) and manage Pro approval status if required
4. Add internal notes to record preferences or special agreements

Coupons

1. Go to the **Coupons** tab and click **New Coupon**
2. Enter a code or click **Generate** for a random one

3. Choose: **Percentage**, **Fixed Amount**, or **Free Shipping**
4. Set optional rules: minimum order, usage limit, per-customer limit, eligible products or categories, and customer tier
5. Schedule with start/end dates, then toggle active or inactive at any time

Resellers

1. Open the **Resellers** tab and click **New Reseller**
2. Select an approved Pro customer and enter their business name
3. Set commission type (Markup %, Percentage, or Fixed Amount) and payout method
4. Configure storefront branding colors and which products they can sell
5. Set per-product minimum prices to protect your margins

Reviews

1. Open the **Reviews** tab and filter by **Pending**, **Approved**, or **Rejected**
2. Click a review to read its full content and star rating
3. Click **Approve** to publish it on the product page, or **Reject** to hide it

Analytics

1. Open the **Analytics** tab and pick a period: 7 days, 30 days, 90 days, or 1 year
2. Review revenue, order count, average order value, and unique customers — with trend indicators
3. See top-selling products, order status breakdown, and customer tier distribution

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 on or off
3. Click **Save Settings** to apply changes store-wide

Tips

- Use **Duplicate** on a product to quickly spin up similar listings
- The **Compare At Price** shows a strikethrough "was" price on your storefront — great for highlighting sales
- Keep **Cost Price** updated to track real profit margins per product

- Seasonal coupons with scheduled start/end dates can be set up well in advance
- A **Minimum Reseller Price** protects your margins while giving resellers pricing flexibility

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AirSocial

AirSocial

AirSocial is ACME Creative Agency's publishing hub — send content from one place to multiple social platforms and internal channels without logging into each one separately.

Key Features

- **Multi-platform publishing**: Push content to YouTube, Facebook, Instagram, LinkedIn, TikTok, and Pinterest from a single workflow
- **Internal cross-posting**: Repurpose content directly to your AirBlog, AirMail campaigns, and AirGallery — no copy-pasting required
- **Connected Destinations**: See all your linked accounts in one place, with live health status so you know which connections are active
- **Publish Queue**: Every post is queued and dispatched in the background, so you can schedule and move on without waiting
- **Approval Workflow**: For platforms that require a review step before going live, posts pause for sign-off before publishing
- **Auto-publish Rules** *(coming soon)*: Set rules so that new stories, assets, or products automatically flow to the right destinations

How to Use

1. **Open AirSocial** from the sidebar — you'll land on the **Destinations** tab, which lists all platforms ACME Creative Agency has connected
2. **Connect a destination** by selecting a platform and following the authorisation steps (OAuth for external platforms like Meta or LinkedIn; instant for internal ones like AirBlog)
3. **Publish content** by selecting the source material — a story from the DAM, an AirBlog post, or a shop product — then choosing one or more destinations and clicking **Publish**
4. **Monitor the Queue** tab to see pending, in-progress, and completed posts for your account

5. **Review approvals** in the **Approvals** tab if a destination requires sign-off before the post goes live — approve or reject from here without leaving the platform

Destinations at a Glance

Channel	What you can publish
Facebook / Instagram	Stories, assets, blog posts, products
LinkedIn	Blog posts, stories, products
YouTube	Video assets, products
TikTok	Video assets, products
Pinterest	Stories, assets, products, gallery collections
AirBlog	Stories, assets, products
AirMail	Creates a draft campaign — you send it manually
AirGallery	Stories, assets, products *(Phase 1)*

Tips

- If a destination shows a warning icon on the Destinations tab, the connection needs re-authorising — click it to refresh the token before your next publish
- AirMail posts are always created as **drafts** — AirSocial will never send an email campaign automatically; you review and send it yourself from the AirMail screen
- Use the Queue tab to confirm a post went through before publishing again — duplicate protection is built in, but the queue gives you the clearest picture

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AirStudio

AirStudio

AirStudio is your built-in recording studio — capture your screen, your camera, or both, then build a shareable MP4 library for your team and clients. No app to install, no extra software. Everything happens right in your browser.

Key Features

- **Three recording modes**: Screen with a camera bubble in the corner, screen only, or camera only as a talking-head video.
- **Built-in teleprompter**: Paste your script and it scrolls smoothly over the studio preview as you record. Viewers never see it — only you do.
- **Background effects**: Blur what's behind you on camera, or replace it with a solid color for a clean, professional look. Adjust blur strength with a slider.
- **Company logo overlay**: Burns ACME Creative Agency's logo directly into the video. Choose which corner it appears in, how large it is, and how transparent.
- **Resolution choices**: Record at 4K, 1080p HD (the default), or 720p — whatever suits your audience and upload needs.
- **Vertical mode**: Switch to 9:16 in camera-only mode for content destined for TikTok, Reels, or Shorts.
- **Review before saving**: After you stop, you watch the full take back before it goes anywhere. Keep it or discard it.
- **Recordings library**: All your saved videos in one grid, organized into folders. Each card shows the title, duration, and how many times it's been viewed.
- **Public share links**: Generate a watch link for any recording that opens on acme-creative.air4.media — no login required for the viewer. You can also share an entire folder as a single link.
- **Auto transcripts and subtitles**: Recordings are transcribed automatically. Viewers can follow along with captions in the player.
- **Team notes**: Leave notes on any recording for colleagues — useful for feedback rounds or handoff comments.
- **Archive**: Move older recordings out of your active list without deleting them permanently.

How to Use

1. Open **AirStudio** from the sidebar.
2. Choose a recording mode — **Screen + Camera** is selected by default. Click **Share screen** to pick the window or browser tab you want to capture.
3. Optionally configure your take:
    - Paste a script into the **Teleprompter** box and set the scroll speed and text size.
    - Pick a **Background** effect — blur or a solid color — to clean up what's behind you.
    - Toggle **Show company logo** to watermark every frame with the ACME Creative Agency logo.

4. Click **Record**. A 3-second countdown starts, then you're live. A red timer badge shows elapsed time.
5. Use **Pause** to take a break mid-take, and **Stop** when you're finished.
6. Watch your take in the **Review** panel that appears below the stage. Give it a title, then click **Save to Library** — or **Discard** to start over.
7. Click **My recordings** (top right) to browse your library. From there you can play, rename, share, move into folders, archive, or delete any recording.

Tips

- When doing a screen demo, share the specific *window* you're presenting — your script tab stays private and off-camera.
- Your mode, resolution, bubble position, background, and teleprompter settings are remembered automatically for your next session.
- To share a set of related videos as one bundle, create a folder, move the recordings into it, and use the folder's share link — clients get a single URL that plays everything.
- A recording showing a spinner is still being processed on the server. It's typically ready within a minute or two.
- Only you can delete your own notes on a recording; notes from colleagues stay unless they remove them.

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, a feed of your latest subscribers with a growth chart, and a Quick Actions bar for jumping to campaigns, subscribers, forms, templates, and email settings.

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. Filter by all subscribers, active only, or new this month.
- **Referral Tracking**: Subscribers can refer others to your newsletter. Referred signups are linked back to the person who shared, so you can see who your best advocates are.
- **Double Opt-In**: New subscribers receive a verification email before joining your list. They can provide their name and phone number during the confirmation step.
- **Subscriber Growth Chart**: Visual chart showing how your list grows over time.
- **Newsletter Design**: Customize your public newsletter site — 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, clicks, read time, and scroll depth per campaign. Forwarded emails are detected automatically for a fuller picture of reach. View per-subscriber engagement detail from the campaign stats page.

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. Your logo is pulled automatically from Company Settings.
3. Optionally apply a **Design Preset** for a coordinated color and font style.
4. Choose a theme: **Editorial**, **Modern**, or **Minimal**.
5. Pick your primary and secondary colors, body font, and heading font.
6. Add social media links (Facebook, Twitter/X, LinkedIn, Instagram, Pinterest, TikTok).
7. Set the newsletter URL path, footer text, and copyright line.
8. Optionally add custom privacy policy, terms of service text, or **Custom CSS**.
9. 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.
- Open a sent campaign and click **Stats** to see detailed per-subscriber engagement — who opened, clicked, how long they read, and whether they forwarded it.

Analytics

Analytics

The Analytics page gives you a real-time view of how your audience is engaging across everything you publish — emails, blog posts, galleries, forms, and more. For ACME Creative Agency, this means one place to see how clients and prospects are interacting with your content.

Key Features

- **Summary Cards**: Four at-a-glance numbers at the top — Total Views, Unique Visitors, Total Events, and Email Opens — all calculated for your chosen time window.
- **Events Over Time Chart**: A line chart showing activity trends broken down by type (Page Views, Email Opens, Link Clicks, Scroll). Switch between 7-day, 30-day, and 90-day windows using the buttons in the chart header.
- **Events by Source Chart**: A donut chart showing which parts of the platform are driving the most activity — AirMail campaigns, AirBlog posts, AirGallery, AirForms, CRM emails, and more.
- **Top Content Table**: A ranked list of your most-viewed or most-engaged content, showing the source (e.g. AirMail, AirBlog), the item name, and a breakdown of views, link clicks, email opens, and total events.
- **Event Browser**: A searchable, paginated log of every tracked event — useful for investigating specific interactions or auditing activity over a period.

How to Use

1. Open the **Analytics** page from the sidebar.
2. The dashboard loads automatically showing the last **30 days** of activity.
3. To change the time range, click **7D**, **30D**, or **90D** in the top-right of the "Events Over Time" chart — all cards and charts update together.
4. Review the **Top Content** table to see which campaigns, posts, or emails are generating the most engagement. For example, ACME Creative Agency might see their latest AirMail campaign at the top with 240 opens and 58 link clicks.
5. Scroll down to the **Event Browser** to drill into individual events — you can search, sort, and page through the full event log.

Tips

- The **7D view** shows hourly granularity, making it easy to spot spikes right after sending a campaign.
- Source badges in the Top Content table are color-coded — blue for AirMail, green for AirBlog, teal for AirGallery — so you can scan quickly.
- Email Opens in the summary card counts opens tracked across all outgoing emails, not just campaigns — so CRM emails and invoice notifications are included too.
- The Event Browser is great for checking whether a specific contact opened an email or clicked a link on a particular day.

CRM

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, type, or location.

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 independently 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 (e.g. Consultation, Meeting, Call).
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 an address or leave it blank.
5. Optionally link to an Account, Contact, or Project — for example, attach a kickoff call to a client account so it appears in their full activity history.
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 linked 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** time filter 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.

Website

Archive

Archive

The Archive is where recordings go when you move them out of your main Recordings library. They're not deleted — they're simply set aside so your active list stays focused and easy to scan. Everything you can do with a live recording (play, download, share, add notes) works here too, and you can restore any video back to Recordings at any time.

Key Features

- **Archived recordings kept safe**: Videos you archive from the Recordings page land here automatically. ACME Creative Agency's archived session clips and older project recordings are stored here without taking up space in the active library.
- **Full playback in-browser**: Click the thumbnail on any card to open the video player right in the page. If a recording has captions, they display automatically.
- **Transcripts**: When a transcript was generated for a recording, it appears below the player in a collapsible section — useful for reviewing spoken content without rewatching.
- **Notes**: Each recording has a notes panel inside the player. Team members can leave timestamped comments, and anyone can delete their own notes.
- **Metadata at a glance**: Each card shows the recording date, resolution, and duration. Click the info button (□) for a full breakdown — format, file size, share status, and view count.
- **Folders**: Archived recordings can be grouped into folders just like in the main library. Click a folder card to drill in; use the breadcrumb to navigate back to the top level. Create, rename, or delete folders from the toolbar.
- **Private share links**: Generate an unlisted share link for any archived video (or a whole folder). The link works for anyone you send it to — no login required — and you can revoke it at any time with Stop sharing.
- **Download**: Download the original MP4 directly from any card using the download button.
- **Restore to Recordings**: The restore button (circular arrow) moves a video back into your active Recordings library instantly.
- **Permanent delete**: The trash button permanently removes a recording and its files. This cannot be undone.

How to Use

1. Open **Archive** from the AirStudio section of the sidebar.
2. Browse your archived videos as a grid of cards. Folders appear first; click one to open it.
3. To **play** a recording, click its thumbnail.
4. To **restore** a video to the main Recordings page, click the circular-arrow button on its card and confirm.
5. To **share** a video, click the Share button on the card. Copy the private link and send it to whoever needs access.
6. To **share a whole folder**, open the folder then click **Send folder** in the toolbar — or use the share icon on the folder card from the root view.
7. To **add a note**, open the player, scroll to the Notes section, type your note, and click Add.
8. To **permanently delete** a recording, click the trash icon and confirm. Deleting a folder only removes the folder — the recordings inside move back to the unfiled view.

Tips

- Archive is a great place for recordings you want to keep for reference but don't need in your day-to-day workflow — like draft takes, completed project videos, or seasonal content.
- Share links for archived recordings work the same as for live ones. If you already shared a video before archiving it, the link stays active.
- Use folders to organize archived recordings by project or client. ACME Creative Agency might keep a "2024 Campaigns" folder here for easy retrieval.
- Restoring a recording does not affect any share links or notes already attached to it.

DAM

Assets

Assets

Browse and inspect every media file stored in your Digital Asset Management (DAM) site — images, videos, and documents, all organized by story. ACME Creative Agency's asset library shows all the photos and files tied to their editorial and campaign stories in one searchable place.

Key Features

- **Asset Library**: A paginated, searchable list of every file in your selected DAM site, with thumbnail previews so you can identify files at a glance
- **Asset Detail**: Click any asset to open a full detail panel showing the filename, subject, headline, credit line, keywords, location, file size, and storage location — and edit metadata directly from the same panel
- **S3 / Local Badge**: Each asset row shows a cloud (S3) or Local badge so you always know where the file physically lives
- **Stats Bar**: A summary strip at the top shows total counts for Stories, Assets, cloud-hosted files, Accounts, and Downloads across the selected site — a quick health check at a glance
- **Table & Card Views**: Toggle between a detailed table view and a visual card grid to browse in the layout that suits you best
- **Search & Sort**: Filter the list by filename, subject, keywords, or other metadata, and click any column header to re-sort instantly
- **Export**: Download the current filtered asset list as a CSV file for reporting or offline reference
- **Site Selector**: Use the topbar site selector to switch between DAM sites — the asset list and stats bar refresh automatically

How to Use

1. Select a DAM site from the topbar site selector — the asset list loads automatically
2. Browse using thumbnail previews and key metadata columns to find what you need
3. Click any asset row to open the detail panel with full file information

4. Edit asset metadata directly in the detail panel and save your changes
5. Use the search box to filter by filename, subject, keywords, or other metadata
6. Click a column header to sort by that field; click again to reverse the order
7. Toggle between table and card view using the view switcher at the top of the list
8. Use the pagination controls at the bottom to move through large libraries
9. To remove assets in bulk, check the boxes next to the files you want and use the batch delete action
10. Click **Export** to download the current list as a CSV file

Tips

- If no assets appear, make sure a DAM site is selected in the topbar
- The S3 badge (cloud icon) means the file is on cloud object storage; "Local" means it lives on the server — useful for auditing storage costs
- The stats bar updates each time you switch sites, giving you instant counts before you start browsing
- From the asset detail panel, you can navigate directly to the parent Story to see all other files in the same editorial package

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Assets Manager — Digital Asset Management

The Assets Manager is Pilot's digital asset management (DAM) system — your central library for all media files: images, videos, audio, and documents. For ACME Creative Agency, every campaign image, client photo, and brand asset lives in one searchable, organized place.

Key Features

- **Grid & List Views**: Switch between a visual thumbnail grid and a detailed list view using the toggle in the top-right corner
- **Stats Dashboard**: See total asset count, storage used, and image/video breakdowns at a glance (collapsible to save screen space)
- **Cloud Storage**: Your assets are held in secure cloud storage built for fast, reliable delivery
- **AI Image Generation**: Create images from a text prompt using DALL-E 3 (5 credits) or Gemini (3 credits) — your credit balance is shown before you generate
- **Collections**: Organize assets into named Collections, Galleries, Campaigns, Catalogs,

Albums, or Projects — click any collection card to drill into its contents

- **Content Provenance (C2PA)**: Automatically validates the digital origin of each asset — see whether an image was human-captured, AI-generated, or AI-edited, and filter your library by provenance
- **Metadata & EXIF**: Each asset stores title, alt text, description, tags, copyright, and usage rights; photos include extracted camera data with a full EXIF/IPTC viewer
- **Usage Rights Tracking**: Flag assets as Commercial, Editorial, Restricted, or Unknown
- **Feature Image Assignment**: Set any asset as the cover image for a Campaign, Gallery, or Catalog directly from the asset detail panel

How to Use

Uploading Assets

1. Click **Import Assets** in the top-right
2. Optionally assign to a Campaign, Gallery, or Catalog before uploading
3. Drag and drop files or click to browse — supports JPG, PNG, GIF, WebP, and common video formats
4. Use the **Server Import** tab to scan and bulk-import files already stored on the server

Generating Images with AI

1. Click **AI Generate** (wand icon) — your current credit balance is shown
2. Choose **DALL-E 3** (5 credits, HD option available) or **Gemini** (3 credits, more aspect ratios)
3. Enter a description up to 4,000 characters and adjust size or quality settings
4. Click **Generate Image** — DALL-E also shows how it interpreted your prompt; the result saves directly to your library, tagged with the AI provider

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**
- Filter by **provenance** to show only AI-generated, human-captured, or unverified assets
- Use **Group By → Collection** to browse collection cards — click any card to drill into its assets

Viewing & Editing an Asset

1. Click any asset to open its detail panel

2. See file info: filename, type, size, dimensions or duration, site, collections, uploader, and date
3. Edit the **filename** directly, or update metadata: title, alt text, description, tags, copyright, and usage rights
4. View **content provenance** (C2PA) — source classification and signer information
5. Expand **Raw EXIF / IPTC Data** to view full technical camera metadata from a photo
6. Use **Set as Feature Image** to assign the asset as the cover for a Campaign, Gallery, or Catalog
7. Copy the asset's direct URL, download the file, or click **Save Changes** to apply edits

Batch Actions

Select multiple assets using the checkboxes, then choose:

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

Tips

- Assign assets to a site at upload time — they'll be available across Site Builder, Airmail campaigns, AirGallery, and AirCatalog
- Use the C2PA provenance filter to quickly separate ACME Creative Agency's original photography from AI-generated work
- Toggle the stats panel off to maximize screen space when browsing large libraries
- AI-generated assets are automatically tagged with the provider name for easy filtering later
- Use consistent tags across your library to make search more effective

CRM

Automations

Automations

Set up rules that run automatically when something happens in your account — no technical knowledge required. Automations save time by handling repetitive tasks like sending follow-up emails, creating tasks, or tagging contacts the moment a trigger fires.

Key Features

- **Visual Step Builder**: Add actions one by one to build exactly what happens when an automation runs
- **Wide Range of Triggers**: Start automations from events across Contacts, Invoices, Quotes, Contracts, Projects, Bookings, Forms, and more — or trigger one manually
- **Powerful Actions**: Send emails or SMS, create tasks, add/remove tags, change statuses, log activities, call external webhooks, or pause with a timed delay
- **Dashboard Stats**: See at a glance how many automations are active, how many total runs have occurred, and how many failed — click any stat card to filter the list instantly
- **Pre-Built Recipes**: Activate ready-made automations for common workflows in one click
- **Run History**: Review every execution with step-by-step logs showing what succeeded or failed
- **Toggle On/Off**: Pause any automation without deleting it

How to Use

Create an Automation

1. Click **New Automation**
2. Enter a name and optional description (e.g., "Invoice Paid — Thank You Email")
3. Select a **Trigger** — the event that starts the automation (e.g., "Invoice Paid", "Contact Status Changed")
4. Fill in any trigger conditions that appear (e.g., a specific status value or tag name)
5. In the right panel, click **Add Step** and choose an action type

6. Configure each step — pick an email template, enter a task title, set a delay duration, etc.
7. Use **Available Variables** (shown as clickable chips) to personalize content — for example, insert `{{contact_name}}` or `{{invoice_number}}` into email subjects
8. Check **Active** to enable the automation, then click **Save**

Use a Recipe

1. Click **Browse Recipes**
2. Preview available templates — for example, "New Lead Nurture", "Invoice Reminder", or "Booking Confirmation"
3. Click **Use Recipe** to load it into the editor
4. Adjust any steps to fit your workflow and save

Monitor Runs

1. Click **View History** on any automation to see its past executions
2. Each row shows the status (Completed, Partial, or Failed), the date, and how many steps ran
3. Expand any row to see exactly which steps succeeded or failed and why

Enable or Disable

- Click the toggle on any automation card or list row to turn it on or off instantly
- A green badge means active; grey means paused

Tips

- Test a new automation before it runs live by clicking **Run Now** on its card
- Use the **Wait / Delay** step to space out follow-up emails or tasks over days
- The **Failed** stat card is a quick way to spot broken automations — click it to filter to only those with errors
- Switch between **Card** and **List** view using the toolbar icons — your preference is saved automatically
- Recipes are a fast way to get started — edit them freely after loading

Settings

Billing & Plans

The Billing page lets you manage your subscription plan, AI credits, invoices, payment history, and payment methods — all organized across four tabs. For an account like ACME Creative Agency, this is where you track plan usage, pay outstanding invoices, and top up AI credits when needed.

Key Features

- **Overview**: Your current plan, AI credits gauge, and saved payment method at a glance
- **Invoices**: All invoices sent to your company, with outstanding balance tracking, full invoice detail, PDF download, and online payment
- **Payments**: Complete history of all charges — subscriptions, invoice payments, credit packs, and storage packs — with filters to narrow results
- **Plans & Add-ons**: Purchase credit packs or storage packs, change your plan, and review your billing history
- **Auto-Renew**: Automatically replenish AI credits or storage 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

Overview Tab

Your active plan is shown with its name, price, and included limits (users, sites, storage, contacts, emails, AI credits). The AI credits gauge shows available vs. used credits and your auto-renew status. Click **Change Plan** to upgrade or downgrade, or **Add Card** to save a payment method.

Invoices Tab

All invoices issued to your company appear here. If ACME Creative Agency has unpaid invoices, a red **Outstanding Balance** banner appears at the top showing the total amount due. Click any invoice row to open the full detail — showing line items, subtotal, tax, total, and payment history. From there you can **Download PDF** or click **Pay Now** to pay an outstanding balance immediately.

Payments Tab

A complete log of every charge on your account. Use the filter pills to show only:

- **Subscriptions** — recurring plan charges
- **Invoices** — invoice payments
- **Credits** — AI credit pack purchases
- **Storage** — storage pack purchases

Plans & Add-ons Tab

Browse and purchase **Credit Packs** or **Storage Packs** at any time without changing your plan. Below, **Billing History** shows all pack and plan purchases — filterable by Plans, Credits, or Storage — with a downloadable PDF for each.

Flying License (Startup Package)

Available in the Change Plan dialog, the Flying License is a one-time purchase that includes 6 months of Premium Economy, 250 GB storage, AI credits, and an investor deck template — ideal for new businesses.

Set Up Auto-Renew

1. Open the **Auto-Renew & Alerts** panel in Plans & Add-ons
2. Toggle on **AI Credits** or **Storage**, choose a pack, 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%)
3. Click **Save Settings**

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

Add a Payment Method

Click **Add Card** in the Overview tab. Card details are securely handled by Stripe — we never store card numbers.

Redeem a Coupon

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

Tips

- A saved payment method is required before auto-renew can activate
- The Invoices tab shows a red badge when you have unpaid invoices — check it regularly
- Use the Payments filter to quickly find a specific type of transaction
- The Flying License appears at the bottom of the Change Plan dialog and is only available once per account
- Coupon codes always show a preview of their benefits before you confirm

CRM

Budget

Budget

The Budget page gives ACME Creative Agency a complete financial picture across all projects — tracking what you've spent, what you've earned, and how you're tracking against your goals.

Key Features

- **KPI Summary**: Four headline numbers at the top — Total Budgets, Total Spent, Total Revenue, and Overall P&L. The P&L turns green when you're profitable and red when you're not.

- **Monthly Objectives Grid**: Set your budget and revenue targets month by month for the year. Just click any number and type a new value — it saves automatically. Rows show your targets alongside actual expenses and actual revenue so you can see how each month compares. Use the arrows to flip between years.

- **Monthly Spending vs Revenue Chart**: A side-by-side bar chart covering the last 12 months. Red bars are expenses, green bars are revenue — a quick way to spot which months were your strongest.

- **Expense Breakdown**: See where your money is going by category — Labor, Equipment, Subcontractor, Travel, Software, and more. Each category shows its share of total spending as a percentage bar.

- **Revenue per Year**: A horizontal bar chart showing total paid revenue for each year ACME has been active. The current year is highlighted.

- **Project Budgets Table**: Every active project listed with its annual budget, total spent, a % used progress bar, revenue target, revenue earned, P&L, and a status badge (Under / On

Target / Over). Click any column header to sort. Click any row to open that project.

- **Recent Expenses**: The 10 most recent expense entries across all of ACME's projects, with category, project name, amount, and date.

- **Add Expense**: Log a new expense directly from this page without going into a specific project.

- **Export**: Download the full project budgets table as a CSV file for reporting or accounting.

How to Use

1. Open the **Budget** page from the sidebar to see your financial overview load automatically.
2. Review the four KPI cards at the top for a quick health check.
3. In the **Monthly Objectives** section, enter your spending budget and revenue targets for each month — type directly into any cell and it saves within a couple of seconds.
4. Scroll down to the **Project Budgets** table to see how individual projects are performing. Use the search box to find a specific project quickly.
5. Click **Add Expense** (top right) to log a cost — select the project, enter a description, amount, date, and category. Check "Billable to client" if the cost can be passed on.
6. Click **Export** to download the project budgets as a spreadsheet.

Tips

- A project's status badge turns **red (Over)** when spending exceeds its budget by more than 10% — a quick warning sign to investigate.
- The Monthly Objectives grid auto-saves as you type, but you'll see the row turn yellow briefly to confirm it's been registered.
- Clicking a project row in the table takes you directly to that project's detail page.
- Categories in the Expense Breakdown are set when you log each expense — being consistent with categories (e.g., always using "Labor" for staff costs) makes the breakdown more useful over time.

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.

Settings

Business Setup

Business Setup

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

Key Features

- **Progress Tracker**: A visual bar with three step indicators (Domain, Email, Payments) fills as you complete each step. An "All Set!" badge appears at the top when everything is done.
- **Domain Connection**: Link your own domain with DNS verification, Cloudflare routing, and automatic SSL — each handled as a guided sub-step.
- **Email Sending**: Once your domain is connected, enable outbound email from your domain address. Verification happens automatically in the background.
- **Stripe Payments**: Connect your Stripe account to accept payments from clients. This step can be started at any time, independently of the others.
- **Auto-refresh**: When a step is in progress (like DNS propagation or email verification), the page checks for updates every 30 seconds — no manual refreshing needed.

How to Use

Step 1: Connect Your Domain

1. Enter your domain (e.g. `acme-creative.com`) in the Domain field. If you've connected a domain before, it will be pre-filled.
2. Click **Check DNS** to verify your domain is pointing to the server.
3. If DNS isn't set up yet, the page shows an **A record** to add at your domain registrar — the exact IP address is displayed. DNS changes can take up to 48 hours to propagate, and the page checks again automatically.
4. Once DNS is verified, click **Add to Cloudflare** to route your domain through Cloudflare.
5. A **Provision SSL** button then appears — click it to secure your domain with an SSL certificate.

6. When complete, a green banner confirms your domain is connected with SSL enabled.

Step 2: Set Up Email

1. This step is locked until your domain is fully connected. Once Step 1 is complete, a **Set Up Email Sending** button appears.
2. Click it — the system adds the required DNS records and verifies your domain automatically. No manual DNS work needed here.
3. While verification runs, you'll see live status for **Domain Verification** and **DKIM** updating on screen.
4. When both are verified, a green banner confirms email sending is ready.

Step 3: Connect Payments

1. Click **Connect Stripe** to start onboarding. You'll be redirected to Stripe to set up your account — this can be done at any time, even before finishing the other steps.
2. After completing Stripe setup, you're returned to Business Setup where the page confirms your **Business Name**, **Charges**, and **Payouts** are enabled.
3. If you didn't finish the Stripe flow, click **Continue Stripe Onboarding** to return and complete it.

Tips

- You must be a company owner or admin to access Business Setup.
- Email setup stays locked until the domain step is fully complete (SSL included), but payments can be connected at any time.
- If DNS is taking time, leave the page open — it polls every 30 seconds while a step is in progress.
- After returning from Stripe, the page refreshes automatically after a moment. If you see a "needs more info" message, click **Continue Stripe Onboarding** to finish the process.

CRM

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
- Workflows: Automate repetitive CRM tasks with rule-based workflows

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.

Calendar

Calendar

Schedule and manage appointments with your clients, contacts, and projects — all in one place. ACME Creative Agency's upcoming calls, site visits, and project milestones all appear here in a single unified view.

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. Each type has its own automatic color and icon for instant recognition.
- **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. Virtual options reveal a meeting link field — Google Meet and Zoom can generate that link automatically when those integrations are connected.
- **Google Calendar Sync**: Two-way sync with Google Calendar keeps changes in both places up to date automatically.
- **Color Labels**: Override the default type color with one of 8 colors for quick visual identification.
- **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 the calendar. Click any bar to jump directly to that project.
- **Project Milestones**: Project milestone events appear as distinct calendar items, also linking back to their 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 **Calendar** 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** reveals a meeting link field — the link is generated automatically on save when those integrations are connected.
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 — working hours, appointment duration, and buffer time between bookings — control when clients can book.

Tips

- Use **Week** or **Day** view to see exact appointment times side by side. Both views automatically scroll to 8 AM so your working hours are front and center.
- Project timeline bars span across days automatically — click one to jump straight to that 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 open a new appointment already set to that time.
- Connect Google Calendar under **Integrations** 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

Website

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. Recipient counts update live as you change your selection.
- **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**: Upload and insert images or videos from your media library directly into the email editor. Edit titles, descriptions, and metadata from within the campaign 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 comma-separated addresses to review the email in a real inbox.
- **Performance Stats**: After sending, view opens, clicks, bounce rate, top-clicked links,

delivery timeline, and geographic engagement 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 or videos.
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, bounce rate, top-clicked links, delivery timeline, and geographic engagement.

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.

DAM

Catalogs

Catalogs

Catalogs are the top-level 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 — for example, ACME Creative Agency might have catalogs like "Spring Campaign 2025" or "Brand Assets."

Key Features

- **Catalog List**: See all catalogs for the selected DAM site at a glance, each showing its collection, media type, and live counts of stories and assets
- **Type Badge**: Each catalog displays a photo or video badge so you can instantly identify its media type
- **Collection Grouping**: Catalogs can belong to a collection, letting you organize them into broader categories (e.g. grouping seasonal campaigns under "2025 Campaigns") — the collection name appears directly in the list
- **Story & Asset Counts**: Each row shows how many stories and total assets the catalog contains, displayed as badges for quick scanning
- **Newsletter Settings**: Each catalog has its own sender address, subject line, recipient list, and HTML template for email distribution — fully independent from other catalogs
- **Newsletter From Column**: The list shows each catalog's sender address so you can confirm the right address is set without opening the editor
- **Search**: Filter the list in real time by typing any part of a catalog name

How to Use

1. Select a DAM site from the site selector in the top bar — the catalog list loads automatically for that site
2. Browse the list to see all catalogs, their type, collection, story counts, and asset totals
3. Use the search box to quickly find a catalog by name
4. Click **Edit** on any row to open the catalog editor — update the name, description, display

order, type, collection, and all newsletter settings including sender address, subject line, recipient list, and email template
5. To browse the stories inside a catalog, go to the **Stories** page and filter by that catalog

Tips

- A catalog with a high asset count but few stories likely has stories with large photo sets — head to the Stories page and filter by that catalog to explore
- Use collections to group related catalogs; the collection name shows in the list for easy scanning
- Each catalog's newsletter settings are fully independent — sender address, subject, recipient list, and template can all be customized per catalog without affecting any others
- Use the **Order** field in the editor to control how catalogs are sorted for subscribers browsing your site
- If no catalogs appear, make sure you have selected a DAM site from the top bar

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Celebs Archive

Celebs Archive

Celebs Archive is your DAM's built-in facial recognition and identity catalog. It scans every photo in your library for faces, mines names from existing photo descriptions, and builds a searchable roster of recognized people — so searching "Jennifer Lopez" in your DAM returns every photo she appears in, even if those photos were never manually tagged.

Key Features

- **Live Stats Dashboard**: At a glance, see how many faces have been detected across your library, how many people are cataloged, and how many matches are waiting for your review.
- **Persons Catalog**: Browse all recognized individuals as a card grid. Each card shows the person's name, category (Celebrity, Actor, Musician, Athlete, Model, Politician, etc.), verified photo count, and any pending provisional matches.
- **Search & Filter**: Search the catalog by name or known alias, and narrow results by person type. Sort by most photos, alphabetically, or recently updated.
- **Identity Records**: Each person entry supports aliases (stage names, maiden names),

character roles, a short bio, and optional reference links for cross-checking identity.

- **Review Queue**: When the system is confident it has matched a face to a known person, that match lands here awaiting your approval. Each card shows a cropped face thumbnail, the suggested name, and a confidence score. Approve or reject with a single click.
- **Caption Mining**: Names already embedded in your existing photo captions — such as "L–R: Tom Hanks, Meryl Streep..." — are automatically extracted to seed the catalog. Well-captioned archives get a head start with no manual effort.
- **Automatic Writeback**: Once you verify a match, the person's name is written back into the photo's metadata, making them discoverable in all DAM searches and portals immediately.
- **Processing Monitor**: The Jobs tab shows the status of each background step — face detection, name extraction, matching, and writeback — so you always know where processing stands.

How to Use

1. Open **Celebs Archive** from the sidebar. The stats bar at the top shows a live summary of your library's recognition progress.
2. Click the **Persons** tab to browse your identity catalog. Search for a name, or use the type filter to see only Actors, Musicians, Athletes, etc.
3. Click any person card to open their full record, see matched photo thumbnails, aliases, and roles. Use the edit form to update their name, category, or bio.
4. To add someone new, click **New person**, enter their name and category, and save. They become available for future matching immediately.
5. Click the **Review Queue** tab — the badge shows how many matches are pending. For each card, review the face crop and suggested name, then click the green checkmark to approve or the red X to reject.
6. Visit the **Jobs** tab to confirm background processing is progressing normally across all pipeline steps.

Tips

- Start with the highest-confidence matches in the Review Queue — the percentage shown on each card indicates how certain the system is.
- Rejecting a wrong match is just as valuable as approving a correct one: both actions help future matching improve.
- If a person goes by more than one name, add the alternate as an alias so searches find them either way.
- Verified identities are shared across your entire DAM — every portal and catalog benefits

automatically.

CRM

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. For an account like ACME Creative Agency, the dashboard brings together every active project, pending invoice, upcoming event, and open task in one view — no hunting across separate screens.

Getting Started

New accounts see a **welcome screen** with a 5-step checklist (add an account, create a project, set up your pipeline, send a quote, track revenue) and feature cards linking directly to each section so you can jump right in.

Key Features

- **KPI Stats Bar**: Live counts for total accounts, active clients, prospects, active projects, pipeline value, and total revenue — all clickable to open filtered views.
- **Active Projects Timeline**: In-progress projects with status, priority, client name, and dates. Click any row to open the full project detail panel.
- **Revenue Trend Chart**: Collected revenue over the past 6 months with a badge showing this month vs. last month.
- **Annual Revenue Chart**: Total realized revenue by year, so you can see growth at a glance.
- **Pipeline Funnel**: Open projects by stage — Proposed, Contracted, Planning, In Production, On Hold — with deal counts and values per stage.
- **Today's Appointments**: All meetings and calls for today with time and linked client.
- **Quote Win Rate (90 days)**: Quotes sent, accepted, declined, and total accepted value over the last 90 days.
- **This Week's Activity**: Calls made, emails sent, meetings held, and tasks completed since Monday.
- **Upcoming Events**: Project milestones and events due in the next 14 days, sorted by date.
- **Recent Activity Feed**: Live log of the latest 15 actions across all accounts — notes, calls, emails, and status changes.
- **Overdue Invoices**: Alert panel (shown only when needed) listing past-due invoices with client name, amount, and due date.
- **Tasks & Follow-ups**: All pending tasks, reminders, scheduled calls, and meetings that still need attention.
- **Budget Status**: Projects with budgets show spending and revenue targets vs. actuals for

the current month, with clear On Track / Over / Behind indicators.
- **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.

Project Detail View

Click any project row to open its full detail panel. Tabs let you manage every aspect of the project in one place:

- **Events** — Add and manage project events (ceremonies, deliveries, setup days, etc.)
- **Quotes** — Create, send, and convert quotes into contracts or invoices
- **Documents** — Manage contracts, including electronic signature from both parties
- **Invoices** — Track payments, record receipts, and manage billing
- **Timeline** — Full chronological history of everything that happened on the project

The sidebar shows status, type, priority, dates, budget, and expense tracking — all editable in place. Use the fullscreen toggle for a larger workspace.

How to Use

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

Importing Contacts

Click **Import** at the top right to bring contacts in from a CSV file.

1. Upload your CSV (supports name, email, phone, company, job title, city, country, and tags).
2. Map each column to the correct contact field. Enable **Update existing contacts** to avoid duplicates (matched by email) and optionally add bulk tags to all imported records.
3. Click **Import** — a progress tracker shows results as contacts are added.

Tips

- **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.
- Accepted quotes can be converted directly into a contract or invoice from the project detail panel.

DAM

Collections

Collections

Collections are named groupings of catalogs inside your AirDAM portal. Each collection also carries its own email digest settings, so you can deliver curated content to the right audience directly from the platform.

Key Features

- **Site-scoped**: Collections belong to your selected DAM site. Use the site selector in the top bar to switch portals — the list updates instantly.
- **Catalog count**: A badge on each row shows how many catalogs belong to that collection at a glance.
- **Sortable list**: Click the **Collection** column header to sort alphabetically; click again to reverse.
- **Email digest settings**: Every collection stores a sender address, subject line, digest recipient list, and a full email template (header, body, and footer) ready to send.
- **Edit dialog**: Click the edit icon on any row to open a full edit dialog for that collection — update name, description, and all email digest fields in one place.

How to Use

1. Select your DAM site from the top bar. The Collections list loads automatically. For ACME Creative Agency, this might be the **acme-creative** portal.
2. Scan the list to see each collection's name, description, catalog count, sender address, and email title — for example, collections like "Spring Campaign Assets" or "Brand Guidelines" alongside their catalog counts.
3. Click the **Collection** column header to sort alphabetically — handy when managing a large library.
4. Click the **edit icon** on any row to open the edit dialog. Update any of these fields:
    - **Name** and **Description** — how the collection is labeled in the portal
    - **Digest List** — the email addresses that receive this collection's digest

- **Email From** — the sender address shown in digest emails
- **Email Title** — the subject line of the digest email
- **Template Header / Body / Footer** — the full layout and copy of the email

5. Click **Save**. The list refreshes to reflect your changes.

Tips

- Use collections to group catalogs by campaign, client, or content type — ACME Creative Agency could maintain separate collections for each active client project.
- Check the **Catalog count** badge before sending a digest. A count of zero means the collection has no content yet.
- If the list is empty after selecting a site, no collections have been set up for that portal yet — contact your DAM administrator to get started.
- The email template fields (header, body, footer) support multi-line content, so you can build richly formatted digest emails directly from the edit dialog.

Settings

Company Settings

Company Settings

Manage your company profile, invite team members, and configure email sending. Only company admins and owners can access this page.

Key Features

- **Company Profile**: Update your name, logo, contact email, phone, and website
- **Company Logo**: Pick from your asset library — appears on client-facing pages and invoices
- **Company URL**: Customize your subdomain (e.g. `acme-creative.air4.media`) for your DAM portal and shared links
- **Current Plan**: View your subscription tier — displayed with aviation-themed names (Economy, Business Class, First Class, etc.)
- **Team Members**: See all active members; owners can change roles or remove people
- **Invitations**: Send, track, resend, or cancel team invitations
- **Email Accounts**: Configure sending addresses for billing, notifications, campaigns, and more

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. To add or change your logo, click **Choose from Assets** and pick an image from your DAM library — click **Remove** to clear it
4. Click **Save Changes**

Your active plan is shown below the form — for example, ACME Creative Agency might see "Business Class · $X/mo."

Change Your Company URL

1. On the **Profile** tab, click the **pencil** icon next to your current URL
2. Type a new address — availability is checked live as you type
3. A green checkmark means it's available; a red message explains if it's taken or reserved
4. Press **Enter** or click the checkmark to confirm

> Only owners can change the company URL.

Manage Team Members

1. Click the **Members** tab
2. View each member's name, email, role, and join date
3. As an owner, use the role dropdown to change any member's role (User, Editor, Admin, or Owner)
4. Click **×** to remove a member

> Only owners can change roles or remove members. Owners cannot be removed — change their role first.

Invite a New Member

1. Click the **Invitations** tab → **Invite Member**
2. Enter the person's email and choose a role:
   - **User** — Basic platform access
   - **Editor** — Can manage content
   - **Admin** — Can manage members and settings
3. Click **Send Invitation**

Existing users receive an **Accept Invitation** link; new users see **Create Account & Join** and are added automatically once they sign up. Links expire in **7 days** — click the resend button to generate a fresh link.

Manage Pending Invitations

Each invitation shows its status: **Pending**, **Accepted**, **Expired**, or **Cancelled**. For pending invitations, click the resend icon to send a fresh link (resets the 7-day expiry), or **×** to cancel. The table also shows who sent the invitation and how many times it has been resent.

Set Up Email Accounts

Email accounts control which address your company uses to send invoices, notifications, and campaigns.

1. Click the **Email** tab → **Add Email Account**
2. Choose a purpose:
   - **Billing** — Invoices, quotes, and payment emails
   - **General** — Notifications and system emails
   - **AirMail** — Newsletter and campaign sends
   - **Default** — Fallback for everything else
3. Enter a display name and from address
4. Configure SMTP settings, or click **Connect Gmail** to link a Google account with one click
5. Click **Send Test** to verify delivery, then **Save**

You can add multiple accounts — one for billing, another for campaigns, and so on.

Tips

- Invitations are tied to the exact email entered — the recipient must log in or register with that address
- If a pending invitation already exists for an email, use **Resend** rather than creating a duplicate
- Resending generates a fresh link and resets the 7-day expiry
- You cannot remove yourself from the company — transfer ownership to another member first
- If someone signs up with the invited email, they are added automatically without a separate Accept step

Features & Tools

Contact Detail

Contact Detail

The Contact Detail page gives you a complete picture of any person in your CRM — their info, full communication history, tasks, meetings, linked projects, and files, all in one place. At ACME Creative Agency, opening a contact like "Sarah Chen" brings you straight into her profile with everything needed to manage the relationship without switching screens.

Key Features

- **Unified Activity Feed**: Every email, SMS, note, and synced Gmail message in a single scrollable timeline — a full conversation history at a glance.
- **Built-in Composer**: Send an email, text, or internal note directly from the page using the tabbed composer at the bottom of the feed.
- **Auto-Save Contact Info**: Edit phone, email, company, job title, lead status, or tags — changes save instantly as you type.
- **Tasks & Meetings**: Add to-dos with due dates, schedule calls or in-person sessions, and see upcoming and past meetings in one place.
- **Documents**: Upload files to a contact's profile and attach them to outgoing emails with one click.
- **Linked Projects**: See every project tied to the contact's account and open any of them to view events, quotes, invoices, and contracts.
- **SMS Consent Tracking**: Know whether a contact has opted in to receive texts and how they consented — shown before you send.
- **Lead Scoring**: A running engagement score that updates automatically as you interact.
- **Gmail Sync**: Import this contact's full email history with one button if your Gmail is connected.
- **Contact Navigation**: Step through your list one by one with Previous / Next buttons — great for pipeline reviews.

How to Use

1. Click any contact from the Contacts list to open their detail page.
2. On the left, review and edit their info — phone, email, company, lead status, tags. Everything saves as you type.
3. In the center, scroll the activity feed to review your full history: emails, SMS, notes, and imported Gmail messages.
4. Use the composer at the bottom to reach out — choose **Email**, **SMS**, or **Note**, write your message, and click Send or Save.
5. On the right panel, use the **Tasks** tab for to-dos with due dates, and **Meetings** to schedule or log time with this contact.
6. Upload files in the **Docs** tab. Click the paperclip in the email composer to attach them to a message.
7. Open the **Projects** tab to view linked projects and click any row to see full project detail.

Tips

- Notes are internal only — they are never sent to the contact.
- The **Lead Status** badge (New, Contacted, Qualified, Proposal, Won, Lost) tracks where each person sits in your sales process.
- If a contact hasn't opted in to SMS, a warning appears before you can send — keeping you compliant.
- Press the left and right arrow keys to move between contacts without returning to the list.

CRM

Contacts

Contacts

Manage your CRM contact list — add, edit, search, and organize the people and businesses you work with, all in one place.

Key Features

- **Stats Dashboard**: Five live counters at the top — Total Contacts, New Leads, Newsletter, Portal Access, and Customers — click any card to instantly filter the list to that segment, click again to clear
- **Contact List**: Sortable, paginated table showing name with avatar initials and company, email, phone/mobile, tags, and date added
- **Search**: Find contacts instantly by name, email, company, or notes
- **Tags**: Organize contacts with custom tags; the dropdown filter shows how many contacts share each tag
- **Add & Edit**: Create or update contacts using a full-featured modal form
- **Account Auto-Linking**: When you enter an email address, the system checks the domain and automatically links the contact to a matching company account — for example, adding someone at acme-creative.com links them to ACME Creative Agency
- **Bulk Delete**: Select multiple contacts and delete them all at once
- **Quick Email**: Click the email icon on any contact row to open a new message to that person
- **CSV Import**: Upload a spreadsheet with a three-step wizard — upload, map columns, and review results

How to Use

Adding a Contact

1. Click **New Contact** in the top-right corner
2. Enter the contact's first and last name (required)
3. Fill in any details — email, mobile, phone, company, job title, address, city, state, ZIP,

website, or notes

4. Add tags by typing a name and pressing **Enter**, or click a suggestion from the "Popular tags" shown below the input
5. Click **Save Contact** — if you entered a business email, the contact is automatically linked to a matching account

Editing a Contact

1. Click the **Edit** button on any contact row
2. Update any fields in the form
3. 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
- Click any **stat card** at the top to filter by segment (e.g. click **New Leads** to see ACME Creative Agency's new pipeline contacts) — click again to clear
- Click any column header to sort the list

Deleting Contacts

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

Importing from CSV

1. Click **Import CSV** and drag & drop your file, or click **Browse Files**
2. Review the column mapping — common headers like `telephone`, `organisation`, and `full_name` are auto-detected; adjust any columns as needed and preview your data before committing
3. Optionally enable **Update existing contacts** to merge records matched by email, and add default tags to apply to all imported rows
4. Click **Import Contacts** — a summary shows how many were imported, updated, skipped, or had errors

Tips

- Stat cards double as quick filters — click **Customers** to see just your customers, click again to return to the full list

- Your top 10 most-used tags appear automatically as suggestions when creating or editing a contact
- The email icon only appears on contacts that have an email address on file
- Account auto-linking skips personal email providers (Gmail, Outlook, Yahoo, etc.) — only business domains are matched
- Use **Update existing contacts** on import to keep your data in sync without creating duplicates
- Contacts are shared across your company — all team members see and manage the same list

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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, PDF export, and invoice generation.

Key Features

- **Contract Editor**: Full-screen three-panel editor — details on the left, HTML content in the center, signatures on the right
- **Contract Types**: Contracts, Questionnaires, Subcontracts, Lead Forms, and Proposals — 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 sign directly in the browser using a signature pad — works with mouse or touchscreen on any device
- **Status Tracking**: Follow every contract through Draft → Sent → Signed → Active → Completed, or mark it Void or Expired
- **Amendment Workflow**: Amend a signed contract (with a reason), which clears signatures and requires both parties to re-sign
- **PDF Download**: Download a formatted PDF of any contract, including captured signatures
- **Invoice Generation**: Convert a signed or active contract into an invoice with one click
- **Automations**: When a contract is signed, connected automations fire — including moving the linked project to a Won stage and upgrading the account from Prospect to Client

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 pick 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: `{{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 and the status changes to **Sent**
3. The client receives a link to view and sign the contract on any device

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

Amend a Signed Contract

1. Open a signed contract and click **Amend** in the footer
2. Enter the reason for the amendment
3. The contract returns to Draft, all signatures are cleared, and both parties must sign again

Generate an Invoice

From the list, click **Generate Invoice** in the row actions of a signed or active contract — an invoice is created and linked to the contract.

Download a PDF

Click **PDF** in the contract editor header, or use the **Download PDF** row action in the list.

Void a Contract

Open any sent, signed, or active contract and click **Void** in the footer.

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
- Contracts created from a project page automatically pre-fill the account and project fields
- The signature pad works on mobile and tablet — each signature records the date and time for your records
- When both parties sign, any connected automations trigger automatically
- Default system templates cannot be deleted — only custom templates you create can be removed

DAM

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**: Choose from 6 ready-made themes: Dark Pro, Light Clean, Midnight, Corporate, Warm Earth, and **Match Website**. The Match Website preset automatically inherits brand colors from your main site (e.g. acme-creative.air4.media) so your portal feels like a seamless extension of your brand. Your logo, watermark, and portal name are preserved when switching presets.
- **Branding**: Set your portal name (pre-filled with your company name), upload a logo (shown in the portal header), add a watermark (stamped on downloaded assets), and choose from 8 font families including Inter, Poppins, Montserrat, and more.
- **Colors**: Fine-tune 11 individual colors — primary, accent, backgrounds, text tones, and status colors — using a color picker or by typing a hex value directly. Changes appear in the preview instantly.
- **Layout**: Adjust card corner rounding (0–20 px), grid spacing (4–16 px), and border opacity using simple sliders.
- **Custom CSS**: Add CSS overrides in the Advanced section for styling beyond the built-in controls.
- **Live Preview**: See changes instantly in a split-screen preview. Toggle between desktop, tablet (768 px), and mobile (375 px) views without leaving the page.

How to Use

1. Select your DAM site from the topbar — the editor loads that site's current design. If no site is selected, you'll see a prompt to choose one first.
2. Click a **Theme Preset** card to apply a starting point. Each card shows a preview of its primary, accent, and background colors. The active preset is highlighted with a colored border.

3. Expand **Branding** to confirm or update the portal name, upload a logo, add a watermark, and select a font family.
4. Expand **Colors** to adjust any of the 11 color values. Click a swatch to open the color picker, or type a hex code directly into the field.
5. Expand **Layout** to slide card radius, grid gap, and border opacity to your preference.
6. For advanced needs, expand **Advanced** and enter custom CSS in the text area.
7. Watch the live preview update in real time. Use the desktop / tablet / mobile buttons to check each screen size. Click the refresh icon if the preview appears out of sync.
8. Click **Save** to apply your changes. Click **Reset** to revert to the selected preset's defaults (you'll be asked to confirm). Both buttons are grayed out until you make a change.

Tips

- Use a PNG or SVG with a transparent background for the best logo and watermark results (max 5 MB, supports PNG, SVG, JPEG, GIF, and WebP).
- The watermark is stamped on assets when clients download them — keep it subtle and semi-transparent for a professional result.
- **Match Website** is a great starting point for ACME Creative Agency — it pulls colors directly from acme-creative.air4.media so the portal feels like a natural extension of your brand.
- If you upload a logo and then switch presets, your logo stays in place — presets only change colors and layout.
- Uploaded logos and watermarks are saved to your **Assets Manager** automatically, so you can reuse them across the platform.
- The **Save** button activates only when you have unsaved changes — if it's grayed out, you're already up to date.

Digital Assets

Digital Assets

The Digital Assets page is your central hub for your Digital Asset Management (DAM) system — including a fast first-time setup wizard and your day-to-day media library dashboard.

Key Features

- **Express Setup**: A 2-screen wizard to launch your DAM in about 60 seconds
- **Auto-Generated Catalogs**: Starter catalogs are created automatically based on your content type
- **Dashboard**: A live overview of your library — stories, assets, storage, and active users
- **Catalog Visibility**: Show or hide catalogs from your public portal with one click
- **Client Portal**: A branded web address where your team and clients browse and download media
- **Client Lightboxes**: Share curated sets of images with clients — no account needed to view or download
- **FotoTrafiX Integration**: Upload photos with IPTC metadata directly from the FotoTrafiX desktop app

How to Use

First-Time Setup

If your DAM isn't set up yet, the express wizard launches automatically.

Screen 1 — Tell us about your content:

1. **Choose your content type** — Select Photography, Video, Mixed Media, Events, Entertainment, or Custom. Matching catalogs are pre-created for you. ACME Creative Agency selected Photography and had Editorial, Commercial, and Archive catalogs ready immediately.
2. **Name your portal** — Enter a name (e.g. "ACME Media"). Your portal address previews live below as you type.

Click **Next** when both fields are filled in.

Screen 2 — Confirm and launch:

Review what will be created: your catalog list, portal address, and 3 user groups (Admin, Editor, Viewer). Your account is set as Admin. Click **Launch My DAM** to provision everything.

A **Getting Started Sheet** then appears with your portal URL, login details, catalog list, and 3 quick steps: create a story, upload assets, and share with clients.

Using the Dashboard

Once your DAM is active, four stat cards appear at the top:

- **Stories** — Total story sets in your library
- **Assets** — Total individual files uploaded
- **Storage Used** — Space consumed by your media
- **Active Users** — Team members with access

Click **Open Portal** in the top right to visit your live portal.

Managing Catalogs

Each catalog card shows how many stories and assets it contains. Click the **eye icon** to show or hide a catalog from your portal — hidden catalogs stay in your library but won't appear to clients. Click **Add Catalog** to create a new one.

Your Portals

The Portals section lists your active portal addresses. Click **Open** to visit, or the copy icon to grab the link and share it.

Recent Stories

The bottom of the dashboard shows your 10 most recently added stories, with title, location, and date at a glance.

Tips

- Your portal address is generated from your portal name — choose it carefully, as it cannot be changed after launch
- Admins have full access; Editors can upload and edit; Viewers can only browse
- Hidden catalogs are visible to Admins only — keep work-in-progress content private before publishing to clients
- Use **client lightboxes** to share a curated selection — clients can view and download without needing an account
- Use **FotoTrafiX** to tag, caption, and batch-upload photos directly into your DAM catalogs from your desktop

Downloads

Downloads

Track every file downloaded from your DAM site — who downloaded it, when, at what resolution, and which story it came from. For ACME Creative Agency, this gives you a full audit trail of everything clients and team members have pulled from acme-creative.air4.media.

Key Features

- **Download Log**: A full chronological record of all asset downloads, newest first. Read-only — this is your audit trail, not an editable list.
- **Asset Thumbnail**: Each row shows a small preview of the downloaded file so you can identify assets at a glance.
- **User & IP Tracking**: See exactly which user account triggered each download and the IP address it came from.
- **Resolution Badges**: Color-coded by quality tier — Full (green), Web (blue), View (light blue), High (amber) — so you can instantly see how assets are being consumed.
- **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 row shows the story the asset belongs to, giving context without extra navigation.
- **Search**: Quickly find downloads by username, IP address, or zip file name.
- **Sortable Columns**: Sort by date, user, asset ID, resolution, or IP to spot patterns in usage.
- **Export to CSV**: Download your filtered results as a dated CSV file for reporting or analysis (up to 10,000 rows).

How to Use

1. Select your DAM site from the site selector in the top bar.
2. Navigate to **Downloads** 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, or 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 the current filtered view as a dated spreadsheet.

Tips

- The list sorts newest-first by default — ideal for a quick review of recent activity.
- The color-coded resolution badges make it easy to see whether users are pulling full-quality files or just web previews.
- 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 — useful for client access reviews.
- Apply date range filters before exporting to keep your CSV reports focused and manageable.
- If you manage multiple DAM sites, switch between them using the top bar — the downloads list updates automatically.

Features & Tools

Event Hub

Event Hub

The Event Hub is your command center for a single photobooth event. From here you design the booth experience, manage captured photos, track performance, and see who attended — all in one place. For ACME Creative Agency, each branded activation or client event gets its own dedicated hub.

Key Features

- **Design tab**: Set the kiosk's colors, logo, and attract screen message so guests see ACME Creative Agency's branding the moment they step up to the booth.
- **Experiences tab**: Choose which booth modes guests can use — Classic Photo, AI Portrait, Boomerang, Video Booth, and more. Add multiple experiences, rename them, and fine-tune each one independently.
- **AI Prompt builder**: Craft AI photo transformations using a guided builder (choose style, mood, background, and extras) or write free-form prompts. Preview any prompt against a sample photo before the event goes live.
- **Sharing tab**: Control where guests land after their session — your website, a Google Reviews page, or Yelp. Set a minimum review count to unlock sharing and customize the SMS message guests receive with their gallery link.
- **Settings tab**: Manage session behavior — countdown timer, idle timeout, max AI photos per guest, and the PIN code used to exit kiosk mode.
- **Assets tab**: Browse every photo and video captured at the event in a filterable grid. Publish the gallery with one click to generate a shareable link, or download everything as a ZIP file.
- **Analytics tab**: See how the event performed — photos taken, shares, gallery visits, and a 30-day chart plotting daily captures and shares side by side.
- **Guests tab**: Review everyone who used the booth, including their SMS delivery status, whether they viewed their personal gallery, and their marketing consent.

How to Use

1. Open any event from the Photo Events list to enter its hub.
2. Go to the **Design** tab — upload ACME Creative Agency's logo and choose brand colors for the kiosk screen.
3. In **Experiences**, add the booth modes you want guests to see and configure each one. For AI portraits, build your prompts using the guided builder or free-form text.
4. Click **Test** on any AI prompt to preview the transformation before the event — adjust until you're happy with the result.
5. Open the **Sharing** tab, add your review destinations, and customize the SMS guests receive after their session.
6. Review timing and operational details in **Settings**, then click **Save**.
7. Copy the **Kiosk URL** from the Overview panel and send it to your booth operator — that link launches the booth.
8. After the event, go to **Assets** and click **Publish Gallery** to make photos available to guests via a stable shareable link.
9. Check **Analytics** for engagement numbers, and visit **Guests** to see the full attendee list or export it as a CSV.

Tips

- Use the **Prompt Library** to save your best AI prompts and reuse them at future ACME Creative Agency events without starting from scratch.
- The gallery can be published and unpublished at any time — useful for reviewing photos internally before opening them to guests.
- The **Client Share** link lets guests access their personal gallery independently of the main event gallery.
- Export the guest list from the Guests tab to follow up with attendees or bring them into your contacts for future campaigns.

Events

Events

The Events page is where ACME Creative Agency manages all iPad photobooth activations — from brand launches to corporate galas. Each event is a fully configured kiosk experience: branded design, AI photo experiences, a review gate, and a guest gallery.

Key Features

- **Event List & Stats**: See all events at a glance with counts for upcoming, this month, and completed. Filter by status or camera type.
- **Design Studio**: Set brand colors, logo, overlay image, and the attract message guests see on the idle screen — with a live kiosk preview updating as you work.
- **Experiences**: Build a menu of capture options — standard photos, AI-styled transformations, video booths, and business card captures. Drag to reorder, enable or disable each.
- **AI Photo Prompts**: Write freeform prompts or use the guided builder (style, mood, pose, background) to create AI transformations. Browse a template library with presets like Renaissance portrait, Cyberpunk, or Pixar — then test any prompt against a sample photo before the event.
- **Review Gate**: Require guests to leave a Google or Yelp review before unlocking their gallery. Set the number of reviews required.
- **SMS Sharing**: Customize the text message guests receive with their gallery link, including their name and your company name.
- **Event Hub**: After the event, publish the guest gallery, browse captured photos and videos, download a ZIP archive, share with clients, and export the guest list as a spreadsheet.

How to Use

1. Click **New Event** and enter the name, date, and description.
2. On the **Design** tab, pick colors, upload your logo, and write the attract message guests see before tapping to start.
3. On the **Experiences** tab, add capture types — Photo, AI Photo, Video, or Biz Card. For AI Photo, write a prompt or use the guided builder, then click **Test Sample** to preview before the event.
4. On the **Sharing** tab, configure your review gate and customize the SMS guests receive.
5. On the **Settings** tab, set the operator exit PIN and adjust timeouts for your venue.
6. Click **Save**, then use **Copy Kiosk URL** or **Open Kiosk** to get the link you'll load on the iPad.
7. After the event, open the **Hub** tab to publish the gallery, download photos, and export your

guest list.

Tips

- Use **Test Sample** before every event to confirm AI prompts look great — it catches surprises before guests arrive.
- The **Guided Builder** is the fastest way to get started: pick a style, mood, and background from dropdowns and watch the prompt write itself.
- Assign an emoji to each AI prompt so guests can instantly spot their favorite style on the selection screen.

Flying License — Startup Package

Flying License — Startup Package

The Flying License gives ACME Creative Agency access to a suite of startup-focused tools: an AI-powered investor deck builder, a beta tester recruitment program, a launch toolkit, and more — all from one dashboard.

Key Features

- **Investor Deck**: Build and manage multiple AI-generated investor presentations. Choose from 5 templates — Classic, Pitch Perfect, Data-Driven, Storyteller, or Startup Sprint — then generate polished slides from your startup profile and share private links with investors.
- **8-Step Wizard**: Answer guided questions covering Business, Problem, Market, Product, Traction, Revenue, Team, and The Ask. Your progress saves automatically so you can return any time. A progress bar and step badges show exactly where you are.
- **AirBeta**: Recruit and manage beta testers with AI-powered application scoring, a referral leaderboard, and 10 branded email templates — all hosted at your domain.
- **AirLaunch**: Present your decks in full slideshow mode, track investor views via shared links, and export to PDF or PowerPoint.
- **Startup Plan** *(Coming Soon)*: Business model canvas, milestone tracking, revenue projections, and team planning tools.
- **Company-Scoped**: All team members at ACME Creative Agency share the same startup profile and decks.

How to Use

Build Your Investor Deck

1. Click **Flying License** in the sidebar.
2. Click **Start Wizard** — or **Continue Wizard** if you've already begun.
3. Work through all 8 steps. The dashboard shows a progress bar and highlights which steps are complete.
4. Once all steps are done, click **Generate Deck** to let the AI assemble your presentation.

Manage Multiple Decks

1. Your decks appear in the **Investor Deck** card on the dashboard.
2. Click a deck name to view it, or click the **pen icon** to edit its data or switch templates.
3. Click **+ New Deck** to create an additional deck — useful for tailoring different pitches to different audiences.
4. To remove a deck, click the **trash icon** and confirm. This cannot be undone.

Share with Investors

1. Open a deck from the dashboard.
2. Enable sharing to generate a private link — investors can view the deck without logging in.

Open AirBeta or AirLaunch

1. From the Flying License dashboard, click **Open AirBeta** or **Open AirLaunch**.
2. Each tool opens its own dedicated section within Pilot.

Tips

- Complete all 8 wizard steps before generating so the AI has full context for a strong deck.
- Create separate decks for different audiences — for example, a Data-Driven deck for angels and a Storyteller deck for VCs.
- The **star icon** marks your primary deck — it always appears first in the list.
- Decks labeled **Draft** haven't been generated yet. Click them to return to the wizard and finish.
- All team members at ACME Creative Agency share the same profile, decks, and investor links.

DAM

FotoTrafiX

FotoTrafiX

FotoTrafiX is ACME Creative Agency's central media ingest and review station. Files arrive from your photographers — via direct upload, FTP, Dropbox, or the FotoTrafiX field app — and land here first for culling, editing, and routing to the right destinations.

Key Features

- **Multi-Source Ingest**: Files from FTP drops, Dropbox sync, browser uploads, and the FotoTrafiX field app all appear in the left-side Sources tree, organized by date.
- **Three-Panel Workstation**: Browse sources on the left, review media in the center (Grid, List, Metadata, or Full-screen view), and manage your tray and delivery destinations on the right.
- **Cull Mode**: A fast full-screen review — press Space to pick, X to reject, Z to undo. Ideal for large deliveries where speed matters and you need to stay oriented.
- **Face Lab**: Detects faces automatically and matches them against your roster. Confirmed names flow into metadata fields like caption, keywords, and title.
- **Image Editing**: Adjust exposure, color, contrast, and crop directly in the browser. Apply named presets (Vivid, Warm, B&W, Film, etc.) or use individual sliders. The original file is never altered.
- **Video Trim**: Set an in-point and out-point visually to deliver a clean clip. Transcripts appear as captions when available.
- **Metadata Templates**: Save IPTC presets — for example, an "ACME Event — Los Angeles" template with credit line, copyright, and location pre-filled — and apply them to a whole batch with one click.
- **Destinations & Delivery**: Route photos to your Pilot DAM catalog, an FTP server, a Dropbox folder, or a client approval pool. Each destination has an on/off toggle so you control what's active per session.
- **Client Approval Pools**: Send a curated selection to named reviewers. Each person receives a private review link — no login required on their end.

How to Use

1. Open FotoTrafiX from the sidebar and click a date folder in the Sources tree to load a delivery into the center panel.
2. Review photos in **Grid** or **Full** view. Click **Cull** for a fast pick/reject session on large batches.
3. Right-click any photo to set its status — Approve, Flag, or Reject — or use keyboard shortcuts (P / F / X).
4. Add approved photos to the **Selection Tray** in the right panel using the tray button or the context menu.
5. Choose one or more active destinations and click **Send** to route files to your catalog, FTP server, Dropbox folder, or client review pool.
6. Switch to **Metadata** view to edit IPTC fields individually or apply a saved template before sending.

Tips

- The selection tray persists if you reload the page — you won't lose a batch in progress.
- Use **Cmd+A** to select all visible photos, then apply a batch status or template in one move.
- Color labels (Red, Orange, Green, etc.) are private workflow flags — they do not appear in delivered assets.
- Photographers configured with a rename pattern have their files renamed automatically on ingest, so no manual cleanup is needed.
- Use **Archive Mounts** to browse files in your existing storage without importing them — useful for re-delivering or re-cataloging older material.

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 — for example, ACME Creative Agency might have groups like "Clients", "Partners", and "Internal Team", each with different download rights.

Key Features

- **Group list**: View all groups configured for your DAM site, with their name and description at a glance.
- **Access level badges**: Each group displays its permission tier as a color-coded badge — None, View, Web, or Full — so you can see at a glance who can do what.
- **User count**: See how many accounts belong to each group, making it easy to understand how your user base is spread across permission tiers.
- **Web ID reference**: Each group shows its internal identifier, useful for traceability when managing DAM accounts.
- **Edit action**: Click **Edit** on any row to open a modal where you can update the group's name, description, and default access level.
- **Catalog access control**: Inside the edit modal, set per-catalog access levels — None, View, Web, or Full — to control exactly which catalogs each group can browse or download from.

How to Use

1. Select a DAM site from the topbar site selector. The Groups list loads automatically.
2. Browse the list to see all groups for that site, along with their access level badge and user count.
3. Click **Edit** on any row to open the edit modal.
4. Update the group's name, description, or default access level as needed.
5. Scroll down in the modal to the **Catalog Access** section — use the dropdowns to set each catalog's permission level for this group.
6. Save your changes when done.

Access Levels

Badge	Meaning
None	No access to assets
View	Can browse assets but cannot download
Web	Can download web-resolution files
Full	Can download full-resolution files

Tips

- Groups are defined at the DAM site level — switching sites in the topbar will show that site's groups.
- The **Users** count reflects live data, so you can see at a glance how many accounts hold each permission tier.
- Use **Catalog Access** inside the edit modal to fine-tune which catalogs are visible to each group and at what resolution — especially useful when some catalogs contain sensitive or premium content.
- To move an individual account to a different group, manage that account from the **Accounts** page.

Features & Tools

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 live or export as a PDF.

Key Features

- **Multiple Decks**: Create and manage several decks side by side — one per audience, narrative, or funding stage. Switch between them using the deck selector dropdown at the top.
- **5 Deck Templates**: Choose from Classic, Pitch Perfect, Data-Driven, Storyteller, or Startup Sprint when creating a deck. Each changes the layout and typography to suit your pitch style.
- **6 Color Themes**: Pick a visual style — Modern Dark, Clean Light, Bold Gradient, Minimal, Corporate Navy, or Warm Sunset. Your brand colors apply automatically to charts.
- **AI Generation**: Click **New Deck** then **Generate Deck** to build all 12 slides from your startup profile — cover, problem, solution, market, traction, financials, and more. Costs 10 credits.
- **Card Grid View**: Your deck appears as a grid of slide thumbnails. Hover over any card to reveal edit and regenerate shortcuts, or click to open the full slide editor.
- **Inline Editing**: In the slide editor, click directly on any text to edit it. Changes save automatically.
- **Per-Slide Regeneration**: In the slide editor, click the magic wand icon to rewrite just that slide with AI. Costs 2 credits.
- **Speaker Notes**: Each slide has optional talking points. Toggle them using the notes icon in the slide editor — notes are editable inline.
- **Presentation Mode**: Click **Present** (or press **F**) to go fullscreen. Navigate with arrow keys. Press **Escape** to exit.
- **PDF Export**: Click **PDF** to download your complete 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 it at any time.

How to Use

1. Complete the Startup Wizard first — the deck is built from the data you enter there
2. Click **New Deck**, choose a template and color theme, then click **Generate Deck** (10 credits)
3. Your 12 slides appear as a card grid — click any card to open the slide editor
4. In the editor, click any text to edit it directly — edits save automatically
5. Use the **Previous / Next** buttons or your keyboard arrow keys to move between slides
6. To rewrite a single slide with AI, click the magic wand icon in the editor toolbar (2 credits)
7. Click **PDF** to export, or **Present** to launch fullscreen for a live pitch

Managing Multiple Decks

- Use the **deck selector** (top left) to switch between decks or create a new one
- Click the **gear icon** to Rename, Duplicate, Set as Primary, or Delete the current deck
- The primary deck is the one shared via your investor link
- Duplicate a deck before making major edits — deleting is permanent

Tips

- Keep your startup profile complete — richer data produces stronger AI-generated slides
- Set your brand colors in the Startup Wizard before generating — they apply to charts automatically
- Use Presentation Mode when pitching live; refine content in the card grid view beforehand
- Use the toggle in the Share modal to temporarily disable your investor link without deleting the deck

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Investor View

Investor View

The Investor View is a polished, full-screen pitch deck that investors see when you share your startup deck with them. No login required — they simply open their private link and your deck loads instantly, branded with your colors and logo.

Key Features

- **Private share link**: Each deck has a unique, secure link. Only people with the link can view it. You can disable the link at any time to stop access.
- **Full-screen slide experience**: The deck fills the entire screen in a 16:9 presentation format — clean, professional, and distraction-free.
- **Multiple slide types**: Slides can show text and bullet points, key metrics displayed as large numbers (e.g. "$2.4M ARR", "12,000 Users"), or interactive charts including bar, line, doughnut, and TAM/SAM/SOM market size breakdowns.
- **Your branding**: The deck uses ACME Creative Agency's brand colors and logo throughout — from the cover slide to chart colors and the navigation bar.
- **"I'm Interested" button**: A prominent call-to-action button appears on every slide. When an investor clicks it, they enter their name and email and the founder is notified immediately.
- **Keyboard navigation**: Investors can use arrow keys (← →) or click the Prev/Next buttons to move through slides. Dot indicators at the bottom show progress.
- **Engagement tracking**: The platform silently records how many slides each viewer saw and how long they spent reading — data that appears in your deck analytics.

How to Use

This page is what your investors see — you don't navigate to it yourself. Here's the flow:

1. Open your **Startup Deck** page and generate or select a deck.
2. Click **Share** to get the private investor link.
3. Send the link to investors by email or message.
4. The investor opens the link — they see the full-screen deck, starting with your cover slide showing ACME Creative Agency's name, tagline, and logo.
5. They navigate through your slides using the arrow buttons or keyboard.
6. If interested, they click **I'm Interested**, enter their name and email, and submit — you'll be notified.
7. To revoke access, return to the Startup Deck page and disable sharing for that deck.

Tips

- Make sure your cover slide tagline is punchy — it's the first thing investors read.
- Slides with metrics (large numbers) tend to be the most impactful; use them for revenue, growth rate, and user counts.
- Check your deck analytics after sending links to see which slides investors spend the most

time on.

- You can have multiple decks — for example, one for seed investors and one for strategic partners — each with its own private link.
- If a deck link is leaked or forwarded unexpectedly, disable it immediately from the Startup Deck page.

CRM

Invoices

Invoices

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

Key Features

- **Invoice Builder**: Add line items using custom entries, products from your catalog, or pre-built packages — each with name, description, quantity, unit, 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 per line item
- **Payment Methods**: Accept Stripe, bank transfer, check, PayPal, Zelle, 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
- **Payment Reminders**: Send a quick payment request email from any unpaid invoice without re-sending the full invoice
- **Recurring Invoices**: Auto-generate invoices weekly, bi-weekly, monthly, quarterly, semi-annually, or annually — with optional auto-send directly to your client
- **Renewal Reminders**: Automatically email clients 3, 7, 14, or 30 days before a recurring invoice is due
- **Payment Rules**: Define reusable payment terms to apply consistently across invoices
- **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 — for example, one of ACME Creative Agency's

active clients — and an optional contact
2. Set the title, issue date, and due date
3. Add line items using the **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 each generated invoice to the client automatically
4. Optionally set a renewal reminder (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 from the row menu
- Click **View Schedule** on any recurring invoice to see its frequency, next date, auto-send status, and how many invoices have been generated

Invoice Statuses

Status	Meaning
Draft	Not yet sent — can be edited or deleted

Status	Meaning
Sent	Delivered to the client
Viewed	Client has opened the public link
Partially Paid	Payment received but balance remains
Paid	Fully paid
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 or project
- Use **Revert to Draft** to edit a sent, viewed, or overdue invoice before resending
- Use **Request Payment** to nudge a client with a reminder email — no need to resend the full invoice
- Use **Copy Link** from the list to grab the public payment link without opening the invoice
- Use **Send Selected** to email multiple invoices to clients in one action
- 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
- Click **Payment Rules** in the page header to manage reusable billing terms
- The **Outstanding** stat includes all sent, viewed, and partially paid invoices

DAM

Lightboxes

Lightboxes

Lightboxes are curated collections of assets that your DAM users create to save and share selected media. This page gives you a company-wide view of every lightbox created across all your DAM sites — useful for monitoring what your team has saved and which collections have been shared with clients.

Key Features

- **Lightbox List**: See every lightbox at a glance, with the name, creator, item count, type, creation date, and share code displayed in a clean table
- **Items Badge**: Each row shows a badge with the number of assets saved — a blue badge means the lightbox is populated; a grey "0" means it was created but left empty
- **Type**: Distinguishes between different lightbox categories as defined in your DAM configuration (e.g. personal collections vs. client presentations)
- **Share Code**: Shows the unique token for any lightbox that has been shared externally — blank means it has not been shared yet
- **Search**: Filter the list instantly by lightbox name or the username of the creator
- **Sorting**: Click any column header (Name, User, Type, Created) to sort the list; click again to reverse the direction
- **Pagination**: Lightboxes are displayed 15 per page with navigation controls at the bottom

How to Use

1. Open the **Lightboxes** section from the AirDAM navigation — the list loads automatically, sorted by most recently created first
2. Use the **search bar** to filter by lightbox name or team member username (e.g. search a colleague's name to find their collections)
3. Click any sortable column header to reorder the list; click again to reverse direction
4. Check the **Items** badge to quickly spot which lightboxes are actively used and which are empty

5. Check the **Share Code** column to see which collections have been sent externally to clients
6. Use the **pagination controls** at the bottom to move through the full list

Tips

- The **Items** badge is the fastest way to gauge activity — a lightbox showing 0 was created but never used
- The **Share Code** column only shows a value when a user has explicitly shared that lightbox with an outside recipient — useful for tracking client-facing collections at ACME Creative Agency
- This is a **read-only overview** for administrators; lightboxes are created and managed by users on your DAM front end
- The list shows lightboxes from **all your DAM sites** in one place — use the **User** column to identify which team member owns each one

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Logs

Logs

The Logs page gives you a complete record of file delivery activity on your DAM site — who received files, how many were sent, and how they were delivered, all within a date range you control.

Key Features

- **Delivery summary**: Each row represents a destination that received files during the selected period. For ACME Creative Agency, you might see a row for an FTP drop to a print partner and another for a web upload endpoint, each showing the total files transmitted.
- **Delivery type badges**: Rows are labeled **FTP Out**, **Web In**, or **Removed** so you can see at a glance how each delivery was made. Removed destinations no longer exist in your workflow but their history is preserved.
- **File count**: The Quantity column shows how many files were sent to each destination — highlighted in yellow for active deliveries and red when over 100 files.
- **Summary stats**: A quick-read panel above the list shows your total destinations and total files transmitted for the selected period.

- **Date range filter**: Use the **From** and **To** date pickers to focus on any time window. The page loads showing the last 24 hours by default.
- **Search**: Type a destination name to instantly filter the list.
- **Drill-down detail**: Click **View Details** on any row to see the individual file records — each file name, start time, end time, and remote path.
- **CSV export**: Download up to 10,000 individual transmission records as a CSV file, respecting your active date range.

How to Use

1. Select your DAM site from the topbar — logs are specific to each site.
2. The list loads automatically showing activity from the last 24 hours, sorted by file count.
3. Use the **From** and **To** date fields to broaden or narrow the time window, then click **Apply** to refresh the results.
4. Type in the search box to filter by destination name.
5. Click **View Details** on any row to drill into individual file transmissions for that destination.
6. Click **Back to Logs** to return to the summary view — your date filters are preserved.
7. Click **Export CSV** to download the full transmission records for the current date range.

Tips

- Widen the date range if you're reviewing a full campaign or multi-day delivery window — the default 24-hour view may not capture everything.
- Use **View Details** to verify exactly which files were sent and when, or to troubleshoot a delivery issue with a specific client or partner.
- CSV exports contain individual file records (not the summary totals), with up to 10,000 rows per download.
- Destinations marked **Removed** were once active delivery targets that no longer exist in your workflow — their historical records are still visible here for auditing purposes.

Features & Tools

Metadata Fields

Metadata Fields

Metadata Fields lets you control exactly how asset information appears across your media library — from the captions under thumbnail tiles to the detail panels inside story galleries. For ACME Creative Agency, this means every image, video, and file surfaces the right labels in the right places, using the names your team already uses.

Key Features

- **Custom Labels**: Rename any metadata field to match your vocabulary — swap "Photographer" for "Camera Operator", or "Subject" for "Title", and the change appears everywhere instantly
- **Screen-by-Screen Visibility**: Choose which fields appear on thumbnail tiles, story pages, the photo viewer, and editing panels — each view is controlled independently
- **Drag-to-Reorder**: Arrange fields in any order by dragging rows up or down, so the most important information always appears first in every gallery and portal
- **XMP Export Mapping**: When assets are downloaded or exported, metadata is written using industry-standard XMP format — you choose which standard property each field maps to
- **Instant Effect**: Saved changes apply immediately across all your DAM galleries, portals, and lightboxes — no republishing needed
- **Reset to Defaults**: One click restores all field names and visibility settings back to the platform defaults

How to Use

1. Open **AirDAM** from the main navigation and go to **Metadata Fields**
2. You will see all available fields listed in groups — Description, Credit & Rights, Place & Time, Tracking References, and File Facts
3. To rename a field, click its label box and type your preferred name — ACME Creative Agency, for example, might rename "Subject" to "Title" to match their internal cataloguing workflow
4. Use the checkboxes across each row to show or hide that field on specific views: **Thumbnail**,

Story, **Photo Viewer**, and the edit panels

5. Drag the grip handle on the left of any row to reorder fields — the order here determines the order clients see in every gallery, portal, and lightbox
6. For fields that support multiple export formats, use the dropdown to select your preferred industry standard
7. Click **Save** — all portals and galleries update immediately

Tips

- Keep thumbnail captions brief — two or three fields at most looks cleanest on tile grids
- Hide fields your team never uses (such as Transmission Reference or Fixture Identifier) to keep editing panels focused and uncluttered
- A renamed field updates everywhere simultaneously — thumbnails, story pages, lightboxes, and your public client portals all reflect the new label
- File Facts fields like Filename, File Size, and Duration are always read-only — they display information but cannot be edited or written into the file itself
- Use **Reset to Defaults** if you want to undo all customisations — you will be asked to confirm before anything changes

Website

Modules

Modules

The Modules page is your central dashboard for activating and managing the Air tools available to your account. Turn features on or off instantly — no setup required, and your sidebar updates automatically to reflect what's active.

Key Features

- **Module Grid**: All available Air modules displayed as cards, each showing a name, description, category label, and a color-coded accent bar
- **One-Click Activation**: Toggle any module on or off using the switch at the bottom of each card — the page refreshes so your sidebar reflects the change immediately
- **Live Stats**: Active and total module counts shown as badges in the top-right corner
- **Category Filters**: Filter the grid by category — Content, Marketing, Engagement, Commerce, Collaboration, Startup, or Business — each showing how many modules it contains
- **Search**: Type in the search box to find a module by name or description
- **Open Dashboard**: When a module is active, click the **Open** link on its card to jump directly to that module's dashboard. The link is greyed out while the module is off

How to Use

1. Open the **Modules** page from the sidebar
2. Use the **category buttons** to filter by type, or type in the **search box** to find a module by name
3. Click the **toggle switch** on any card to activate or deactivate it — the page reloads and your sidebar updates automatically
4. Once a module is active, click **Open** on its card to go to its dashboard

Module Categories

- **Content** — Blog, gallery, and catalog tools
- **Marketing** — Email campaigns and outreach
- **Engagement** — Forms, chat, and audience interaction
- **Commerce** — Online store and booking features
- **Collaboration** — Document sharing and team tools
- **Startup** — Investor deck and launch tools
- **Business** — Planning and operations tools

Tips

- Active modules appear at the top of the grid so your enabled tools are always easy to find
- The active/total count badges in the top-right update automatically as you toggle modules
- Some modules require a specific subscription. **AirLaunch** requires the **Startup Package** — its card shows a lock badge and the toggle is disabled if your plan does not include it. If your plan does include it, the card shows a rocket badge instead
- Deactivating a module does not delete any of its data — you can reactivate it at any time
- Module activations apply at the site level, so changes affect your entire site

DAM

Newsletter

Newsletter

The Newsletter section in AirDAM gives you a complete dispatch history of every story sent through a newsletter. For ACME Creative Agency, this means you can see exactly which stories went out, which newsletter edition they appeared in, and when — all in one place.

Key Features

- **Story Thumbnails**: Each row shows the story's cover image for instant visual recognition.
- **Story Title**: The title of the story included in that send.
- **Newsletter ID**: The unique identifier of the newsletter edition the story was dispatched in.
- **Digest**: The digest content associated with each send — useful when you publish multiple editions or content streams.
- **Sent Date**: The exact date the newsletter was dispatched. Most recent sends appear first by default.
- **Search**: Filter the list instantly by Newsletter ID or digest text to locate a specific send.
- **Sortable Columns**: Click the **Newsletter ID** or **Sent** column headers to re-sort ascending or descending.

How to Use

1. Select a DAM site from the site selector in the top bar — the newsletter list will not load until a site is chosen.
2. The dispatch log loads automatically, showing your most recent sends first.
3. Use the search bar to filter by Newsletter ID or digest text. For example, type a newsletter ID to see all stories sent in that edition.
4. Click **Newsletter ID** or **Sent** column headers to change the sort order.
5. Use the pagination controls at the bottom to browse older records — the list shows 15 entries per page by default.

Tips

- If the list is empty, no newsletter dispatches have been recorded for the selected site yet.
- The default view always shows the most recent sends first — handy for a quick check of what went out last.
- This section is a read-only log. To manage campaigns, subscribers, and send new newsletters, use the Airmail module.
- The **Digest** column helps distinguish between content streams if your site publishes multiple newsletter types or editions.

Features & Tools

Photo Booth

Photo Booth

The Photo Booth page lets you build reusable booth configurations, link them to upcoming events, and track session activity across all your events in one place.

Key Features

- **Reusable Configurations**: Build named setups — for example, "AI Watercolor Booth" or "360 Glambot" — and reuse them across multiple events without re-entering settings each time.
- **Multiple Booth Types**: Supports Standard, AI Photo Booth, 360 Booth, GlamBot, Video Booth, and Green Screen — each with its own icon in the grid.
- **Camera Source Options**: Choose between Canon DSLR/Mirrorless, iPad, or iPhone as the capture device for each configuration.
- **Flexible Capture Modes**: Set the booth to capture Photos, Videos, or Boomerangs, with 1–4 shots per session and countdown timers of 3, 5, or 10 seconds.
- **Layout Choices**: Single, Strip (2 or 4), Grid 2×2, or Postcard — controls how photos are arranged in the final output.
- **AI Style Processing**: Enable AI transformation with styles like Watercolor, Oil Painting, Anime, Pop Art, Neon Glow, Vintage Film, Pixar 3D, Cyberpunk, and more. Use the strength slider to control how heavily the effect is applied, or write a custom prompt for a unique look.
- **Delivery Options**: Toggle SMS, Email, and Print delivery per configuration. Customize the attract screen message (e.g. "Touch to Start!") and the SMS text guests receive with their photos.
- **Event Assignment**: Link any configuration to an upcoming event from your projects. The Events tab shows all upcoming events with their venue, assigned config, and booth status at a glance.
- **Analytics Dashboard**: See total sessions, photos taken, deliveries sent, and pending deliveries across all your events. A recent sessions log shows each guest's phone number, photo count, and delivery status.
- **Import / Export**: Export any configuration as a JSON file to back it up or share it. Import a

JSON file to instantly add a configuration from another source.

How to Use

1. Go to **Photo Booth** in the sidebar.
2. Click **New Configuration** in the top right.
3. Give the configuration a name (e.g. "ACME Spring Gala — AI Booth"), choose the booth type, camera source, and capture settings.
4. Under **AI Processing**, toggle AI on and pick a style — or leave it off for a standard photo booth experience.
5. Under **Delivery**, choose how guests receive their photos: SMS, email, or print. Edit the attract message and SMS text to match your event branding.
6. Click **Save Configuration**. The new config appears as a card in the Configurations grid.
7. Click the three-dot menu on a card and select **Assign to Event** to link it to an upcoming project event.
8. Open the **Events** tab to see all upcoming events and confirm which config is assigned to each.
9. After events run, open the **Analytics** tab to review session counts, photo totals, and delivery status.

Tips

- Duplicate an existing configuration to quickly create a variation — for example, a version with AI on and a version with AI off for the same event type.
- Use descriptive names like "ACME — Watercolor 75%" so your team knows exactly which setup to load at the venue.
- Export configs you've dialed in perfectly — it's an easy way to restore settings or share them with a partner agency.
- If a guest's delivery shows as "pending" in Analytics, check your SMS delivery settings in the configuration and confirm the correct delivery method is enabled.

CRM

Pipeline

Pipeline

The Pipeline page gives ACME Creative Agency a visual overview of every open opportunity — from first inquiry through to won deal — organized as a Kanban board with stages you control.

Key Features

- **Kanban Board**: Leads organized in columns by stage, each showing lead count and total value
- **Drag & Drop**: Move a lead to a new stage by dragging its card — saves automatically
- **List View**: Switch to a compact table showing name, contact, source, value, age, event date, and temperature
- **Summary Stats**: Four cards show Pipeline Value, Active Leads, Won This Month, and Win Rate (last 90 days). Click a card to focus the board on that segment; click again to clear
- **Toolbar Total**: A running total reflects the estimated value of all currently visible leads
- **Quick Add Lead**: Click **New Lead** — first name is required, everything else is optional. Lead name is auto-generated if left blank
- **Company Detection**: Enter an email and the system automatically checks if the domain matches an existing account and offers to link the lead
- **Temperature & Age**: Each card shows a colored dot (hot, warm, cold) and a color-coded age badge — green for new leads, red for 30+ days
- **Lead Editor**: Click any card to open a detail panel. Edit name, contact info, event date, notes, stage, value, temperature, and source, then click **Save**
- **Mark Won / Mark Lost**: Trophy and X buttons appear on cards and in the editor. Marking Won automatically upgrades the linked account from prospect to client
- **Log Contact**: Record a call, email, meeting, SMS, or follow-up with optional notes — a badge tracks the total count per lead
- **Convert to Project**: Click **New Project** in the editor (or respond to the automatic prompt) to choose a project type — Event, Production, Rental, Service, and more — and create it immediately
- **Project Detail (Inline)**: Once a project is linked, a badge appears on the card. Click it — or

Open Project in the editor — to open a full multi-tab view: Events, Quotes, Contracts, Invoices, Resources, Budget, People, and Activity. Manage the entire engagement without leaving the pipeline

- **Filters & Search**: Narrow by source or temperature; search by lead or account name
- **Custom Stages**: Click the gear icon to add, rename, reorder, and color-code stages. Set one as **Default** (where new leads land), one as **Won**, and optionally flag stages to auto-trigger project creation

How to Use

1. Open **Pipeline** from the sidebar to see your board
2. Check the four summary cards for a quick health snapshot — click one to focus on that segment
3. Click **New Lead** to add an opportunity; enter an email to auto-detect the linked account
4. Drag a card to move it through stages, or open the editor and pick a new stage from the dropdown
5. Click any card to edit details, log a contact attempt, or mark it won or lost
6. When a lead is ready, click **New Project** to convert it — choose a project type and create it immediately
7. Use the project badge on the card or **Open Project** in the editor to manage quotes, invoices, and contracts right here
8. Click the **gear icon** to manage stages — add new ones, set colors, and configure auto-project triggers

Tips

- **Pipeline Value** only counts active leads, so it always reflects real open opportunities
- **Win Rate** covers the last 90 days — the most actionable window for spotting trends
- **Age badges** turn red at 30+ days — a quick signal for leads that need follow-up
- Set a **Default** stage so every new lead lands in the right column automatically
- Stages with active leads must have those leads reassigned before the stage can be deleted
- The full quote → contract → invoice workflow lives inside the project detail — win the lead, then run the engagement without switching pages

Features & Tools

Pocket Card Mode

Pocket Card Mode

Pocket Card Mode is your inbox for everyone who stepped through your photo booth. It organizes each event into a card grid, shows you who needs a follow-up, and lets you text or email them without ever leaving the page.

Key Features

- **Event grid**: Every photobooth event with captures appears as a card — for example, "ACME Spring Showcase." Each card shows how many photos were taken, how many guests filled out the follow-up form, whether any replies are waiting, and the overall conversion rate.

- **Reply-needed alerts**: A red badge appears on any event or guest with an unanswered inbound text. Those guests float to the top of the list so nothing slips through after a busy event night.

- **Guest feed per event**: Click any event card to see every guest, sorted by most recent activity first. Each row shows their booth photo with an AI-variant thumbnail, their name, phone, email, and the last thing that happened — a text in, a form fill, or a booth capture.

- **Status at a glance**: Every guest shows one of three states — "□ Reply needed" if they texted back, "□ Responded" if they completed the pocket card form, or "□ Awaiting form" if you haven't heard from them yet.

- **Text and email directly from the list**: Every guest row has a Text button and, if you have their email address, an Email button. Click either to open a reply panel pre-addressed to that person.

- **Quick-reply templates**: Three starter messages are built in — an apology if the kiosk form had a glitch, a friendly check-in, and an offer to send more AI photo variants. One click fills the message box so you can edit and send.

- **Live refresh**: After you send a reply the guest list reloads automatically and status badges update. A refresh button in the top-right corner is always available.

How to Use

1. Open **Pocket Card Mode** from the sidebar. Your events load as a card grid.
2. Find the event you want to follow up on — for example, "ACME Summer Client Party" — and click its card.
3. The guest list opens. Guests with a red "Reply needed" badge appear at the top.
4. Click **Text** to send an SMS, or **Email** to send an email.
5. In the reply panel, write your message — or pick a template like "Check-in" or "More AI variants" to start from a pre-written message.
6. Click **Send Text** or **Send Email**. The badge clears and the guest's status updates immediately.

Tips

- The conversion rate on each event card is the share of booth captures who went on to fill out the pocket card form — a quick signal for which events drove the most engagement.
- If a guest appears without a name, their phone number shows instead. You can still text them directly.
- The small AI photo thumbnail in the corner of each guest's portrait is the variant the booth generated for them. Mentioning it in your follow-up tends to get a quick response.
- Guests who texted back within the last seven days trigger the red badge on the event card itself — worth checking the grid the morning after any event.

Pocket Cards

Pocket Cards

Pocket Cards is your photobooth event command center. Every time a guest steps in front of your booth at an activation, a card is automatically created — showing their original photo, the AI-styled version, and their contact details, all in one place. Cards are grouped into galleries by event and date, so you can instantly find any capture from any activation ACME Creative Agency has run.

Key Features

- **Side-by-side photo comparison**: Each card shows the original booth photo on the left and the AI-generated variant on the right — you can see both versions at a glance without opening anything.
- **Contact details on every card**: Guest name, phone, and email appear directly on the card. Once a guest fills out their follow-up form, their details update automatically.
- **Responded indicator**: A green "Responded" badge marks guests who completed the follow-up form. Cards still waiting show an "Awaiting form" status so you always know who to follow up with.
- **Auto-organized into galleries**: Captures group into galleries — one per event per day — so a busy activation weekend organizes itself. No manual sorting required.
- **Rename galleries**: Click the pencil icon next to any gallery heading to give it a custom label, such as "Copa Launch Night – VIP Lounge" instead of the default date-based name.
- **Guest gallery visibility**: For each event-linked gallery, choose whether guests who open their personal photo page see only their own image, or the full event gallery. Toggle between "Own photo" and "Whole event" per gallery.
- **Filter by gallery**: Use the gallery dropdown at the top right to focus on a single activation — useful when reviewing captures from one specific event.
- **Full card detail**: Click any card to open a detailed view with both photos at full size, complete contact information, the event name, exact capture time, lead stage, and newsletter opt-in status.

How to Use

1. Open **Pocket Cards** from the main navigation. Your captures load automatically, newest galleries first.
2. Use the **gallery filter** at the top right to narrow down to a specific event, or leave it on "All galleries" to see everything across all activations.
3. Browse the grid — each card shows the photo pair, guest name, and response status at a

glance.

4. Click any card to open the full detail panel, where you can review both photos side by side and see the complete contact snapshot and lead stage.
5. To rename a gallery, click the small pencil icon next to the gallery heading and type the new name.
6. To control what guests see when they visit their personal photo page, use the "Guests see" toggle on each event gallery — choose "Own photo" to keep it personal, or "Whole event" to let them browse the full gallery.

Tips

- The card count shown next to each gallery name is a quick sanity check after a live event — verify all booth captures arrived without opening every card.
- Newsletter opt-in is shown in the card detail, so you always know which guests to add to your next mailing.
- New captures from a live activation land here automatically — refresh the page during or after an event to see them appear in real time.

DAM

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

CRM

Products & Packages

Products & Packages

Manage your catalog of billable items — individual products and services, bundled packages, and tax rates. Everything here is available when creating quotes and invoices for your clients.

Key Features

- **Quick Stats**: Four cards at the top show your total products, active items, services, and packages at a glance
- **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

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
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 your entire company account — updating a product does not

change past documents

Projects

Projects

Track every project from first proposal to final payment. ACME Creative Agency's full pipeline — quotes, contracts, invoices, expenses, files, and team assignments — all in one place.

Key Features

- **Two Views**: Card grid (with payment progress bars and next-event highlights) or sortable list table with payment totals and event counts
- **Quick Filters**: Scope tabs (In Production, All Active, Proposals, On Hold, Past, All) plus stat cards (In Progress, This Month, Next 30 Days, Upcoming Events) for instant filtering
- **Project Types & Statuses**: Seven types (Single Event, Multi-Day, Production, Rental, Service, Retainer, Custom) moving through Proposed → Contracted → Planning → In Production → Completed
- **Priority Levels**: Low, Normal, High, or Urgent — color-coded throughout
- **Events**: Multiple dated events per project, each with type (Corporate, Wedding, Meeting, Setup, Breakdown, etc.), times, venue, and status
- **Quotes**: Line items, validity dates — convert accepted quotes to contracts or invoices; save reusable templates; send with a scheduled delivery option
- **Contracts**: Full document editor with dynamic placeholders (names, dates, amounts); send for client signature; counter-sign in-platform; amend signed contracts with automatic re-signature tracking
- **Invoices**: Multiple payment methods (Stripe, PayPal, check, cash, Venmo, Zelle, and more), recurring billing with pause/resume, public payment links
- **Budget**: Log Direct Expenses, Vendor Bills, or Resource Costs across categories (Equipment, Labor, Venue, Travel, Subcontractor, etc.); set annual revenue and expense targets; mark expenses as Billable
- **Files**: Upload project documents by category (Contract, Permit, Photo, Invoice, Proposal) and control which files are visible to clients via the portal
- **People**: Assign contacts and team members with roles; set per-stakeholder permissions for

receiving quotes, contracts, and invoices

- **Activity**: Complete history of emails sent from Pilot — quotes, invoices, contracts — with direction, recipient, and timestamp

How to Use

1. Click **New Project**, fill in name, account, type, status, and priority on the **General** tab — add dates and venue on the **Dates & Venue** tab — then **Save Project**
2. Click a project card (or the eye icon in list view) to open the project workspace
3. Work through the tabs inside the workspace:
    - **Events** — schedule dates with type, times, and venue
    - **Quotes** — create, send, and track quotes; convert accepted quotes to contracts or invoices
    - **Contracts** — write contracts with dynamic placeholders, send for signing, counter-sign in-platform
    - **Invoices** — create invoices, record payments, set up recurring billing, share payment links
    - **Budget** — log and categorize expenses; set annual revenue and expense targets; sync resource costs from the People tab
    - **Files** — upload and organize project documents; toggle client portal visibility per file
    - **People** — manage contacts and stakeholders with roles and notification permissions
    - **Activity** — review all emails sent from this project
4. Switch to **List View** (toolbar icon) for a sortable table showing payment totals and event counts

Tips

- Use **scope tabs** to jump instantly to In Production, Proposals, On Hold, or Past projects
- The project sidebar always shows estimated value, contracted value, total payments, expenses, and live profit/loss
- Recommended billing flow: **Quote → Contract (signed) → Invoice**
- Mark expenses as **Billable** to flag costs that should be passed on to the client
- Use **Schedule Send** to defer quote, contract, or invoice emails to a future date and time
- Recurring invoices can be **paused and resumed** — useful for seasonal retainer clients
- Save quotes and contracts as **Templates** to speed up future projects
- Click the **expand icon** in the project header to open the workspace in fullscreen mode

- Filter by **Urgent** priority to surface the projects that need immediate attention

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Quotes

Quotes

Create and send professional quotes to clients, track their status, and convert accepted quotes into invoices or contracts — all from one place.

Key Features

- **Quote List**: See all quotes with number, title, account, status, total, item count, valid date, and age at a glance
- **Stats Bar**: At-a-glance counts for Draft, Sent, and Accepted quotes — plus total accepted value
- **Status Tracking**: Follow each quote through Draft → Sent → Viewed → Accepted, Declined, Expired, or Revised
- **Line Items**: Build quotes from custom items, catalog products, or pre-built packages
- **Pricing Controls**: Per-item discounts, a quote-level discount (fixed or %), and a tax rate — tax applies only to taxable items and adjusts proportionally when a discount is added
- **Optional Items**: Mark add-ons as optional so clients can choose them at acceptance without inflating the base total
- **Payment Rules**: Define payment schedules (e.g. 50% at signing, 50% before the event) and set one as your default
- **Quote Templates**: Save any quote as a reusable template to speed up repeat work
- **Client Acceptance Wizard**: Clients select optional items, confirm event details, preview the contract, and sign digitally — all in one guided flow
- **Auto-Contract Generation**: If a contract template is assigned, the signed contract is created automatically on acceptance
- **One-Click Conversion**: Turn an accepted quote into a contract or invoice directly from the editor
- **Post-Acceptance Workflow**: Automatically trigger follow-up automations the moment a client accepts
- **Duplicate**: Copy any quote as a new draft — great for recurring work like ACME Creative

Agency's seasonal campaigns

- **Filter & Search**: Filter by status or search by quote number or title

How to Use

Create a Quote

1. Click **New Quote** in the top-right corner
2. Enter a **Title** and select the **Account** — for example, "Spring Campaign" for ACME Creative Agency
3. Optionally link a **Project** and **Contact** — dropdowns auto-populate once you pick an account
4. Set a **Valid Until** date and choose a **Pricing Tier** (Retail, Pro, Wholesale, or Custom)
5. Add an intro message, closing message, payment terms, and terms & conditions as needed
6. Use **Internal Notes** for team context — never visible to the client
7. Click **Save Quote**

Add Line Items

In the right panel of the quote editor:

1. Click **Custom Item** for a freeform entry (Service, Product, Labor, or Expense)
2. Click **Product** to pick from your catalog — pricing and taxable status carry over automatically; products are grouped by type for easy browsing
3. Click **Package** to add a pre-built bundle — savings vs. individual items are shown in the picker
4. Set quantity, unit price, and an optional per-item discount on each item
5. Check **Optional** to mark items as client-selectable add-ons

Send a Quote

- Open a draft and click **Send to Client**, or use the **Send** action from the list
- An email preview with a personal message field appears before you confirm
- Status changes to **Sent**; when the client opens their link, it moves to **Viewed**

Client Acceptance

When a client clicks Accept, they go through a guided wizard:

1. Select which optional items they want included

2. Confirm event details (venue, dates, on-site contacts) if applicable
3. Preview the contract with their information merged in
4. Enter their name, email, and draw their digital signature

If a contract template is assigned, the signed contract is generated automatically on acceptance.

After Acceptance

- Click **Convert to Contract** or **Convert to Invoice** in the editor — all line items carry over
- If a post-acceptance workflow is assigned, it triggers automatically

Manage the List

- Filter by **Status** to find quotes at any stage
- Click **Duplicate** on any row to copy a quote as a new draft
- Select multiple rows and click **Delete Selected** to bulk-remove

Tips

- Quote numbers are auto-assigned in the format `QTE-YEAR-NNNN`
- Valid dates shown in red mean the quote has passed its expiry
- A quote can only be converted once — the system prevents duplicate contracts or invoices from the same quote
- Opening Quotes from a Project or Account page pre-fills those fields automatically
- Use **Payment Rules** (button at the top of the page) to standardize deposit and installment schedules across your team

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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

Website

Recordings

Recordings

The Recordings library is where all your AirStudio videos live after a session. ACME Creative Agency's videos appear here as thumbnail cards the moment a recording finishes processing — ready to preview, download, or send to a client.

Key Features

- **Card grid view**: Each video shows a thumbnail, title, date recorded, resolution, and duration at a glance. A "Ready" badge confirms the file is fully processed.
- **Instant playback**: Click any thumbnail to open a full-size player. If a transcript was generated during recording, it appears beneath the video and captions are shown on-screen automatically.
- **Notes**: While watching a recording, type a note in the panel below the player and click Add. Notes show the author's name and timestamp, and any team member can add one.
- **Private share links**: Hit Share on any ready video to generate a private, unlisted link — only people you send it to can watch. No login required. A badge on the card shows how many times the link has been opened. You can stop sharing at any time.
- **Folders**: Organize recordings into named folders — for example, ACME might keep a "Q3 Campaign" folder for all videos from that shoot. Folders appear as cards in the grid. Click one to browse its videos. A whole folder can be shared as a single link so a client receives the entire set at once.
- **Download**: Save any ready video to your computer as an MP4 file. Title, creator, and copyright are embedded in the file automatically.
- **Archive**: Move older recordings out of the main view without deleting them. Archived videos move to the Archive page and can be restored anytime.
- **Video info**: Click the button on any card to see full details — length, resolution, format, transcript status, notes count, and share statistics.

How to Use

1. Open **Recordings** from the sidebar to see the video library.
2. Click any thumbnail to watch the video in the built-in player. If a transcript exists, expand it below the video or read the on-screen captions.
3. To share a single video, click **Share** on its card. Copy the private link and send it to whoever needs to watch it.
4. To organize videos, click the folder button on any card and choose an existing folder or create a new one on the spot. Use **New folder** in the toolbar to create folders at any time.
5. To share a whole folder, open it and click **Send folder** — one link covers all the videos inside.
6. To keep the library tidy, click the archive icon on recordings you no longer need front and center. Find them later under Archive in the sidebar.
7. To delete a video permanently, click the trash icon on the card and confirm. This cannot be undone.

Tips

- The video count in the top-right updates as you navigate into folders.
- If a card shows "Processing," the page refreshes automatically every few seconds — no need to keep clicking Refresh.
- Notes are a great way to leave time-stamped feedback on a recording. Your name is attached automatically so the team knows who wrote each one.
- Stopping a share link does not delete the video. You can always re-share later and the same link URL is reused, so any bookmarks your client saved still work.

CRM

Reports

Reports

The Reports page gives you a live, searchable view of your account's key data — sales, invoices, memberships, events and contacts. ACME Creative Agency can pull up every invoice sent this quarter, see which membership plans are most popular, or get a full attendee list for a past event, then download any of it as a spreadsheet.

Key Features

- **Six report types**: Sales and Revenue, Shop Sales, Membership Roster, Event Attendees, Invoices, and Contacts. Each covers a different part of your account.
- **Custom columns**: Choose exactly which fields appear. No clutter — only the columns that matter to you.
- **Summarize by group**: Collapse rows into a summary. For example, group Shop Sales by product to see one row per item with total units sold and revenue.
- **Date range filter**: Narrow any report to a specific period using the From and To date pickers.
- **Dropdown filters**: Filter by status, category, or other attributes — for instance, show only paid invoices or only active members.
- **Live search**: Type to instantly find a contact, order, invoice number, or event.
- **Save custom reports**: Name and save any report configuration. It appears in your report picker for quick access next time.
- **Export to CSV**: Download up to 10,000 rows as a spreadsheet. Available to account owners and admins.

How to Use

1. Open **Reports** from the sidebar. The picker shows all built-in reports plus any reports your team has saved.
2. Click a report card to open it. Results load immediately — clicking **Invoices** shows ACME Creative Agency's full invoice list, newest first.

3. Use the **From** and **To** date fields at the top right, then click **Apply dates** to filter by a date range.
4. Click any column header to re-sort. Use the search box to find a specific name, email, or order number.
5. Click **Export CSV** to download the current view — filters and date range are included in the export.
6. To build a custom report, click **New report** (top right). Choose a data source, tick the columns you want, optionally pick a grouping and sort order, then click **Preview** to review the results.
7. Give the report a name and click **Save report**. It appears under "Your saved reports" on the picker.
8. To update or remove a saved report, open it and use the **Edit** or trash buttons in the header.

Tips

- The **Summarize by** option is ideal for totals at a glance — grouping Sales and Revenue by category instantly shows how much came from memberships versus event tickets.
- Built-in reports are always available and cannot be deleted. Use them as a quick starting point.
- Apply your filters and date range before clicking **Export CSV** — the download reflects exactly what is visible on screen.
- Saving and exporting reports requires an owner or admin role. Other team members can view reports but not download them.

DAM

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 — no follow-up needed.

Key Features

- **Secure sharing**: Each safebox is tied to a specific story and sent to a named recipient email address
- **Expiration control**: Every safebox has a set expiry date — after that date, the link becomes inactive automatically
- **Status at a glance**: Each row shows a clear **Active** (green) or **Expired** (gray) badge so you always know the current state
- **Full history**: All safeboxes are listed with the story name, recipient email, creation date, and expiry date — newest first
- **Search**: Filter the list by recipient email to quickly find a specific share
- **Edit or remove**: Update the expiry date or recipient on any safebox, or delete one entirely

How to Use

1. Select your DAM site from the top bar — for example, ACME Creative Agency's site — to load its safeboxes
2. The list shows all safeboxes for that site — columns include Story, Recipient, Created, Expires, and Status — newest first
3. Use the search bar to filter by recipient email if the list is long
4. Click **New Safebox** (the lock icon button) to create a new secure share link
5. Choose the story you want to share, enter the recipient's email address, and set an expiry date
6. Save — the new safebox appears at the top of the list with an **Active** badge
7. To make changes, click the edit icon on any row to update the recipient or expiry date
8. To remove access immediately, click the delete icon on that row

Understanding Status

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

Tips

- Use safeboxes when sharing content temporarily — for example, sending a client at ACME Creative Agency a set of campaign images to review before a deadline
- Expiry is automatic — you don't need to manually revoke access when the review period ends
- If you need to extend access, edit the safebox and push the expiry date forward
- The list is always sorted newest-first, so your most recent shares are always at the top
- No DAM site selected? Choose one from the top bar first — each site has its own safebox list

Website

Site Builder

Site Builder is your visual website builder inside Pilot. Describe what you want in plain language, the AI edits your site, and nothing reaches the public until you click Publish. No coding required.

Key Features

- **Vibe mode**: a chat panel beside a live preview of your draft. Ask for anything ("add a testimonials section", "change the hero headline"), watch the plan stream in, and see the edit land in the preview right away. Attach images, video, an HTML mockup, a PDF or a text file to any message. Your conversation comes back when you return, folded into an "Earlier session" block.
- **Advanced mode**: turns the preview into an editable map. Sections get a pink dashed outline with a name badge; headings, buttons, images and text get orange badges. Click any of them for a menu of edits, or click text and type over it in place (Enter saves, Escape cancels). Hover between two sections and a pink "+" line appears so you can add a section exactly there. Images offer "Replace this image" and "Edit alt text"; photo sections open a picture manager for adding and reordering shots.
- **Site Settings** (More menu): a Design tab for brand colors and heading/body fonts, and an Identity tab for site title, tagline, contact email, footer text, logo (light and dark), favicon, social sharing image and social links. All of it applies site-wide.
- **Activity & History** (More menu): every change logged with the page it touched and a button to restore that page. The "View changes" link after each AI edit opens the same panel, and a Backups tab lists your publish restore points.
- **Publish**: one button. A safety check runs first, looking for problems such as two pages sharing an address, published pages with nothing on them, or a page that suddenly lost most of its content. If it finds one, the publish stops and names the page and the problem. Publishing a live site takes an automatic restore point first.
- **Site health**: a chip showing your score out of 100 and the issue count. "See issues" lists them; "Fix all" repairs what it can (page titles, descriptions, image versions) and says what still needs a person. Your live SEO audit result shows here too.
- **Module sections**: if a module is switched on for your site, ask for it in chat ("add a pricing section") and the builder drops in the live widget rather than static markup. Available for plans and pricing, forms, blog, gallery, booking and reviews, and it stays in sync with the module by itself.

How to Use

1. Open Site Builder. You land in **Vibe** mode: chat on one side, your draft site on the other.
2. Type what you want. The AI shows its plan, applies it to the draft, and the preview refreshes. Attach a photo or a mockup whenever you want it used.
3. Switch to **Advanced** when you would rather point than describe, or to drop a new section between two existing ones. It also holds an Explorer view of all your pages.
4. Use the **More** menu for Site Settings (colors, fonts, logo, social links) and for Activity & History.
5. Click **Publish** when the draft is right. That is the only moment your public site changes.

Credits

AI work uses your AI credits, and your balance is shown before every AI action.

- 5 credits per request in the Vibe chat
- 3 credits to edit a single page with AI
- 10 credits to generate a whole new page
- 12 credits to generate a site design preview, then 15 more to build the site from the design you pick
- 3 to 5 credits when the AI has to create a brand new image (it reuses your asset library first when it can)

How Images Stay Editable

Pictures are references to items in your asset library rather than fixed web addresses, resolved when the page is rendered, so replacing the file replaces it everywhere. Photo strips such as heroes, sliders and galleries point at a named collection instead of individual files: add, reorder or remove photos in that collection and every page using it updates on its own.

Tips

- Vibe mode to describe what you want, Advanced mode to point at the exact thing.
- Set colors and fonts in Site Settings before asking for a lot of new pages, so everything is generated on-brand.
- Nothing is public until you Publish, so experiment freely.

Features & Tools

Startup Onboarding

Startup Onboarding

A guided 3-step flow to purchase and activate the Startup Package — giving you immediate access to Pilot Pro, 200 AI credits, 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
- **Your own website**: A `{yourcompany}.air4.media` site, created automatically

One-time price: $499

How to Use

Step 1 — Your Business

A progress indicator at the top tracks where you are in the flow. The screen greets you by name to confirm you're logged in to the right account.

1. Enter your **company name** — for example, *ACME Creative Agency* (required)
2. Select your **industry** from the dropdown: SaaS, Fintech, Healthtech, Edtech, E-Commerce, Media & Entertainment, AI / Machine Learning, Cybersecurity, MarTech, CleanTech, Logistics, or Other (optional)
3. Click **Continue to Payment**

Step 2 — Payment

1. Review the full list of what's included and confirm the $499 one-time price

2. Enter your **card details** in the secure payment form — the Pay button activates once your card info is complete
3. Click **Pay $499** to complete your purchase
4. Payment is processed securely via Stripe

Click **Back** at any time to correct your company name before paying.

Step 3 — You're All Set

Once payment is confirmed, your account is instantly provisioned. You'll see a confirmation checklist:

- Company created
- Pilot Pro activated (12 months)
- 200 AI credits loaded
- Startup profile ready

Your company also gets a dedicated website at `{yourcompany}.air4.media`, set up automatically. It starts in "under construction" mode until you're ready to publish.

Click **Start Building Your Deck** to launch the AI Investor Deck Wizard, or use the **go to your Dashboard** link to explore the platform first.

Tips

- You can go back to edit your company name before completing payment
- Your payment is protected by a **30-day money-back guarantee**
- The `{yourcompany}.air4.media` website is created automatically — no extra setup needed
- After activation, clicking **Start Building Your Deck** takes you directly to the Startup Wizard
- Use the **Back to Startup Package** link at the bottom of the screen to return to the package overview page

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Startup Wizard

Startup Wizard

The Startup Wizard guides you through collecting everything 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 company basics to your funding ask
- **Free Navigation**: Jump to any step at any time using the progress bar — no need to go in order
- **Auto-Save**: Your work saves automatically a few 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 populate fields from your live Pilot data — for ACME Creative Agency, this pulls in active clients, pipeline totals, and your team roster in one click
- **5 Deck Templates**: Choose a template in the settings sidebar — each produces a different layout and slide count
- **Deck Settings Sidebar**: Set your logo, brand colors (Primary, Secondary, Accent), and color theme — a live preview card updates in real time
- **Logo Picker**: Upload an image, browse your company's Digital Assets library, or generate AI logo variations in Horizontal, Stacked, or Lettermark layouts
- **Multiple Decks**: Create separate decks for different audiences — each has its own data profile and a unique investor share link

The 8 Steps

1. **Company Basics** — Name, tagline, logo, industry, stage, founded date, and website
2. **Problem & Solution** — The problem you solve, your solution, and your unique value proposition
3. **Market** — Target customer and market size (TAM, SAM, SOM)
4. **Product** — Description, up to 6 key features, demo URL, and product stage
5. **Traction & Growth** — Current clients, pipeline, MRR, ARR, and growth rate
6. **Business Model** — Revenue type, LTV, CAC, current revenue, burn rate, and runway
7. **Team** — Founder bio and LinkedIn, team members, and advisors
8. **The Ask** — Deck name, raise amount, round type, use of funds, 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 Pilot account
4. Open the **Deck Settings** sidebar to choose a template, set your logo, brand colors, and color theme
5. Use the progress bar at the top to jump between any step at any time
6. Click **Save & Exit** to return to the Startup page without losing progress
7. When ready, go to Step 8, give your deck a name, and click **Generate My Investor Deck**

Deck Templates

Choose a template before generating — each controls layout and slide structure:

- **Classic** (12 slides) — Balanced text, metrics, and charts. The standard YC/Sequoia format.
- **Pitch Perfect** (10 slides) — Bold headlines, 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 and Solution (Step 2), and Founder name (Step 7)
- **Logo options**: Upload a file (PNG, JPG, SVG, WebP up to 5MB), browse your Digital Assets library, or generate AI variations — pick Horizontal, Stacked, or Lettermark layout and refine with feedback
- **Color Themes**: Choose from Modern Dark, Clean Light, Bold Gradient, Minimal, Corporate Navy, or Warm Sunset
- **Use of Funds**: The tracker on Step 8 turns green when your allocations add up to exactly 100%
- **Investor sharing**: Each generated deck gets a unique share link — send it directly to investors with no login required
- **Multiple decks**: Create or duplicate decks from the Startup Package page — each runs its

own independent wizard profile

DAM

Stats

Stats

The Stats page is your AirDAM home base — a live dashboard showing totals across every section of your DAM site, with quick links to jump straight into any area.

Key Features

- **Summary Bar**: Shows live totals for Stories, Assets, Assets on S3, Accounts, and Downloads at a glance, updated each time you select a site.
- **Section Cards**: A grid of 12 cards covers every area of your DAM — Stories, Assets, Accounts, Groups, Collections, Catalogs, Workflow, Downloads, Safeboxes, Lightboxes, Newsletter, and Portal Design.
- **Live Count Badges**: Each card displays the current record count for that section — for example, ACME Creative Agency's dashboard shows their full asset library, active client accounts, and complete download history all on one screen.
- **Site-Scoped Data**: All counts reflect the currently selected DAM site from the topbar. Switch sites to instantly see stats for a different property.
- **One-Click Navigation**: Click any card to go directly into that section — no need to hunt through menus.

How to Use

1. Select your DAM site from the topbar — the dashboard loads automatically for that site.
2. The summary bar at the top shows your five key totals at a glance: total stories, assets, how many are stored on S3, client accounts, and downloads.
3. Scan the section cards to get an overview of your content — each card shows the section name, a short description, and its current record count.
4. Click any card to navigate directly into that section — for example, click **Assets** to open your full asset library, or **Accounts** to manage client access.
5. To view stats for a different DAM site, use the site selector in the topbar — all counts update automatically.

Tips

- Use the Stats dashboard as your daily starting point — the summary bar tells you instantly if anything looks off (unexpected drop in assets, zero accounts, etc.).
- The **On S3** count shows how many of your assets are in cloud storage — a useful check after a bulk upload session.
- If a section card shows 0 when you expect content, confirm you have the correct DAM site selected in the topbar.
- Click **Workflow** from the dashboard to access FTP destinations, distribution lists, processing rules, and the delivery queue — all in one place.
- **Portal Design** is also accessible directly from the dashboard — click it to customize the look and feel of your client-facing DAM portal.

Stories

Stories

Browse and manage your DAM stories — each story groups a set of media assets under a single subject, such as a campaign shoot, a product series, or a press event. For ACME Creative Agency, this might include a "Spring Collection 2025" shoot or a brand launch event.

Key Features

- **Story List**: View all stories with thumbnail, title, date, catalog, credit, source, and asset count at a glance
- **Exclusive Badge**: Stories marked as exclusive display a gold "Excl" badge with a star icon — useful for spotting premium or priority content
- **Asset Count**: See how many assets belong to each story directly in the list, without opening it
- **Catalog Filter**: Use the dropdown to narrow the list to stories from a specific catalog
- **Search**: Find stories by keyword across title, description, credit, tags, and location — results update live
- **Story Detail**: Click **Edit** on any row to open a full detail panel showing all metadata and a scrollable grid of the story's assets

- **Asset Preview**: Click any thumbnail inside a story detail to view full asset metadata — filename, keywords, location, credit, file size, and more
- **New Story**: Create a new story directly from the **New Story** button in the top-right corner
- **Stats Bar**: Live counts at the top show total stories, assets, cloud-hosted files, accounts, and downloads for the selected site

How to Use

1. Select a DAM site from the site selector in the top bar — the story list loads automatically
2. Browse stories sorted by date, newest first, by default
3. Use the **Search** box to filter by keyword — results update live across title, credit, tags, and more
4. Use the **Catalog** dropdown to show only stories from a specific catalog
5. Click any sortable column header (Title, Date, Assets, Credit) to re-sort the list
6. Click **Edit** on any row to open the story detail panel
7. In the detail panel, review the story's metadata (catalog, credit, source, location, tags, exclusive status) and scroll down to see all assets in a thumbnail grid
8. Click any asset thumbnail to open its full metadata — filename, keywords, size, location, and more
9. To add a new story, click **New Story** in the top-right corner

Tips

- If no stories appear, make sure a DAM site is selected in the topbar — the page shows a reminder if none is chosen
- The stats bar refreshes whenever you switch sites, giving an instant snapshot of total content volume
- Exclusive stories are flagged with a gold badge — handy when deciding which content to feature or promote first
- Use the Catalog filter together with Search to zero in on a specific subject within a large archive
- Asset counts in the list are a quick way to gauge which stories have the most content before opening them

Website

Subscribers

Subscribers

Manage all AirMail newsletter subscribers in one place — add contacts, import lists, apply tags, and track engagement across every site in your account.

Key Features

- **Live Stats**: Four cards at the top show your total subscribers, active count, how many have a phone number on file, and new sign-ups this month.
- **Smart List**: Browse and search by email, name, phone, or tag. Filter by site, status (Active / Unsubscribed / Bounced / Complained), source (Import, Form, API, Manual, WordPress), or contact type (Email Only, Phone Only, Email & Phone). Sort by any column.
- **Tags**: Organize subscribers with custom tags for targeted campaigns. Add tags individually or in bulk across many subscribers at once.
- **Batch Actions**: Select multiple subscribers to export, delete, unsubscribe, resubscribe, add to lists, add tags, or remove tags in one step.
- **CSV Import**: Upload a CSV file to add or update large numbers of subscribers quickly, with a live progress bar.
- **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 total opens and clicks per subscriber directly in the list.

How to Use

Add a Subscriber

1. Click **Add Subscriber** (top right).
2. Select which site this subscriber belongs to — for example, *acme-creative.air4.media* — or choose **All Sites** to make them global.
3. Enter their email address (required) and optionally their name and phone number.

4. Add tags by typing and pressing Enter, or click any suggested tag shown below the field.
5. Set the status to **Active** or **Unsubscribed**.
6. Click **Save Subscriber**.

Import from CSV

1. Click **Import**.
2. Select the target site.
3. Upload a CSV file with columns: `email`, `phone`, `first_name`, `last_name`, `tags` (tags comma-separated).
4. Choose whether to update existing subscribers and/or resubscribe previously unsubscribed contacts.
5. Optionally add tags to all imported subscribers and assign them to one or more lists.
6. Click **Start Import** and watch the progress bar.

Import from WordPress

1. Click **WordPress Import**.
2. Select the target site (WordPress imports require a specific site — not "All Sites").
3. Upload your 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 the subscribers you want (or use the select-all checkbox).
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. Search the list by tag name to find all subscribers with a specific label.
- The **Engagement** column shows total opens and clicks, helping you spot your most active readers.
- Click **Export All** to back up your full list before making bulk changes.
- Subscribers marked as Bounced or Complained are automatically excluded from future campaigns — no action needed on your part.

Settings

Templates

Templates

The Templates page lets you control exactly how your invoices and quotes look when delivered as PDFs. Choose a layout style, set brand colors, add a logo, write your footer and payment terms — all with a live preview that updates in real time as you make changes.

Key Features

- **Two document types**: Separate settings for Invoices and Quotes, each with its own tab — changes to one don't affect the other
- **Layout presets**: Choose between *Classic* (clean, professional, colored header) or *Minimal* (grayscale, no colored header)
- **Brand colors**: Primary and secondary color pickers — ACME Creative Agency's existing brand colors are pre-filled automatically as a starting point
- **Logo override**: Optionally supply a different logo for PDFs instead of your default company logo
- **Footer text**: Add a short message or legal line that appears at the bottom of every document
- **Payment terms**: Your standard terms (e.g. "50% deposit required to hold your date") printed on every PDF
- **Show Tax ID**: Toggle whether your Tax ID appears on documents
- **Signature block**: For quotes only — adds a signature line for client acceptance at the bottom of the PDF
- **Live preview**: The preview panel on the right updates instantly as you adjust any setting, using sample line items so you can see exactly what clients will receive

How to Use

1. Open **Templates** from the settings menu
2. Click the **Invoice** or **Quote** tab depending on which document you want to update
3. Select a **Template** layout from the dropdown — Classic or Minimal

4. Use the color pickers to set your **Primary** and **Secondary** colors
5. Optionally enter a logo URL in **Logo Override** to use a PDF-specific image
6. Fill in **Footer Text** and **Payment Terms** as needed
7. Toggle **Show Tax ID** and, for quotes, the **Signature block** checkbox
8. Watch the live preview on the right update with each change
9. Click **Save Changes** to apply your settings to all future PDFs

Tips

- Invoice and Quote templates are saved independently — you can use Classic for invoices and Minimal for quotes if you prefer
- Leaving Logo Override blank means your company's default logo is used automatically
- The preview uses sample data (a fictional "Jane Sample" invoice); real PDFs will show your actual client and billing details
- The **Save Changes** button stays grayed out until you make an edit — it activates as soon as something changes

CRM

To-Dos

To-Dos

Keep your work on track with a personal task list that lives inside your company account. To-Dos is where you capture anything that needs attention — from following up with a client to reviewing a deliverable — with optional due dates and the ability to share selected tasks with your team.

Key Features

- **Quick-add bar**: Type a task title, set a due date, choose Private or Team visibility, and press Add — your to-do appears instantly without opening a form.
- **Due date tracking**: Dates are shown clearly in your list. Overdue items are highlighted in red so nothing slips past you.
- **Private and Team tasks**: Keep a task just for yourself, or mark it as Team so your colleagues at ACME Creative Agency can see it in their own list.
- **Linked to projects and contacts**: When editing a to-do, you can attach it to one of your active projects or a specific contact, giving each task the right context.
- **Status badges**: Every to-do shows as Open or Completed at a glance. Mark one done with a single click — or undo it just as easily.
- **Search and filter**: Search by keyword, or filter the list to show only open tasks, only completed tasks, or toggle between your own tasks and the full team view.
- **Batch actions**: Select multiple tasks and mark them all complete or delete them in one step.

How to Use

1. **Add a task quickly** — Type a title in the bar at the top of the page, optionally set a due date, choose Private or Team, then click **Add** (or press Enter).
2. **View your list** — Tasks appear sorted by due date, with the most urgent at the top. Overdue items stand out in red.
3. **Mark a task complete** — Click the **Complete** action on any row. The title will appear with a

strikethrough and the status badge changes to Completed.

4. **Edit a task** — Click **Edit** on any of your own tasks to open the full edit form, where you can add a description, change the due date, link a project or contact, and adjust visibility.
5. **Filter the list** — Use the Status filter to show All, Open, or Completed tasks. Use the scope filter to toggle between Mine + Team and Only Mine.
6. **Batch complete or delete** — Check the boxes next to multiple tasks, then choose **Complete Selected** or **Delete Selected** from the batch action menu.

Tips

- Tasks marked **Team** are visible to other members of ACME Creative Agency but only the person who created the task can edit or delete it.
- Use the **contact and project links** in the edit form to connect a follow-up task to the right client or job — handy when reviewing your task list during a project check-in.
- The list defaults to showing open tasks sorted by due date, so your most pressing items are always at the top when you open the page.
- You can re-open a completed task at any time using the same **Complete** toggle — it flips the status back to Open.

Settings

Tools — Import Data

Tools — Import Data

The Import Data tool lets you migrate your existing client history into Air4.media from platforms like Dubsado. In one process, ACME Creative Agency can bring over years of projects, contacts, invoices, and contracts — so your full client history is available from day one.

Key Features

- **Dubsado CSV Import**: Upload a CSV export from Dubsado and import projects, contacts, invoices, and contracts into your CRM.
- **Smart Preview**: Before anything is imported, see a full data summary — total rows, revenue, unique clients, companies, and a year-by-year win rate and revenue breakdown.
- **Automatic Status Mapping**: Dubsado statuses are intelligently converted — paid past projects become Completed clients, unpaid leads stay as Prospects, active WIP bookings are preserved as In Progress.
- **Selective Import**: Choose exactly what to bring in — accounts, contacts, projects, invoices, and/or contracts. Toggle each category on or off.
- **Merge Existing Records**: If a client email already exists in your CRM, the import can merge tags and upgrade their status rather than creating duplicates.
- **Rollback Anytime**: Every import can be fully undone from the results screen or the Import History log.
- **Full Import Service**: For a complete migration — including contract content, questionnaires, proposals, PDFs, and calendar events — contact the Air4.media team for a custom quote.
- **Import History**: A log of all past imports shows what was created, when, and lets you rollback any batch.

How to Use

1. Go to **Tools** in the sidebar and open the **Import Data** page.
2. Click the **Dubsado** card to begin (HoneyBook and Generic CSV are coming soon).

3. **Step 1 – Upload**: Export your data from Dubsado as a CSV file, then click **Select CSV File** and choose it.
4. **Step 2 – Preview**: Review the summary cards showing your total rows, revenue, and client count. Check the yearly breakdown to confirm the data looks right before continuing.
5. **Step 3 – Configure**: Choose what to import (accounts, contacts, projects, invoices, contracts). Optionally add default tags — `dubsado-import` is always added automatically. Enable "Update existing records" to merge data rather than skip duplicates.
6. Click **Start Import**, review the confirmation summary, then click **Confirm & Import**.
7. **Step 4 – Results**: See exactly how many accounts, contacts, projects, invoices, and contracts were created. If anything looks wrong, click **Rollback This Import** to undo everything.

Tips

- Run the import in a test pass first — rollback is instant and complete, so there's no risk in trying.
- The "dubsado-import" tag is added to every record, making it easy to filter or bulk-manage imported data later.
- If you have years of Dubsado history and want contracts, forms, and PDFs included, use the **Full Import Service** (click "Learn more" on the Dubsado card) — the Air4.media team handles the full migration for you.
- Check the **Import History** section at the bottom of the page to revisit or rollback any previous import batch.

CRM

Transactions

Transactions

The Transactions page gives ACME Creative Agency a complete line-by-line record of every payment received across all invoices — including what Stripe took in fees, what landed in your account as net, which Stripe payout the money belongs to, and whether each payment has been pushed to QuickBooks.

Key Features

- **Live money summary**: Three cards at the top — Gross received, Stripe fees, and Net — reflect the current filter view and count only completed payments. Change the year or method filter and the totals update instantly.
- **Full payment history**: Every payment line appears with its date, invoice number, client name, amount, and status. For ACME Creative Agency this means Stripe card payments, bank transfers, checks, and cash entries all appear in one unified view.
- **Stripe fee breakdown**: For card payments, the Gross, Fee, and Net columns show exactly what Stripe charged and what you kept — the fee appears in red and the net in green.
- **Payout tracking**: The Payout column shows the abbreviated deposit batch reference for each Stripe payment, so you can trace a payment back to the exact bank deposit it arrived in.
- **QuickBooks sync status**: A green checkmark in the QBO column means the payment is mapped in QuickBooks. A gray dash means it hasn't been synced yet — useful for spotting gaps before reconciliation.
- **Payment method badges**: Color-coded labels — purple for Stripe, blue for bank transfer, gray for check, green for cash — let you scan the payment mix at a glance.

How to Use

1. Open **Transactions** from the sidebar under your company.
2. The list defaults to the current year. Use the **Year** dropdown to switch to a past year, or select **All years** to see the complete history.

3. Use the **Method** filter to focus on a specific payment type — for example, select **Stripe** to review all card payments and their fee deductions.
4. Use the **Status** filter to isolate completed payments, flag pending ones, or review refunds or failures.
5. Type in the search box to find a specific invoice number, client name, or payment reference.
6. Click any column header — Date, Invoice, Client, Gross, Fee, or Net — to re-sort the list.
7. The three summary cards at the top always reflect the filtered results, giving you a running total for whatever slice you're viewing.

Tips

- The summary cards count only **completed** payments — pending or refunded entries are excluded from those totals, though they still appear in the list below.
- The Net column shows the actual amount received for Stripe payments. For checks, cash, or bank transfers where no fee was captured, Net equals the full payment amount.
- Use **Status: Refunded** to quickly surface reversed payments that may need attention in your books.
- Combining Year and Method filters is the fastest way to build a year-end summary of Stripe revenue and fees for tax or accounting purposes.
- The QBO column is a quick sanity check before closing a month — any gray dashes on completed payments may need follow-up in QuickBooks.

Vendor Sourcing

Vendor Sourcing

Vendor Sourcing is where ACME Creative Agency sends requests for quotes, compares bids, awards the work, and manages all the paperwork — in one place. Think of it as a private bidding room for each project need.

Key Features

- **Requests board**: Every sourcing need lives as a named request — for example, "Q4 Brand Activation Photographer" — with a category, location, event date, and an internal budget note vendors never see.

- **Vendor finder**: Search your contacts by keyword, city, or state. Vendors are added as draft invites — nothing goes out until you're ready.
- **Multi-channel invites**: Send by email, SMS, or both. Preview and edit every message before it leaves, or bulk-send all drafts at once.
- **Bid tracking**: See each vendor's amount, availability, and notes in one table. Shortlist or reject bids as you narrow down, then award the winner.
- **Next-steps hub**: After awarding, one-click actions let you notify the winner, pass on the others, create a client quote, place a booking order, and draft a vendor agreement.
- **Order management**: Track the confirmed booking with a PO number, dates, vendor notes, and a status from draft through confirmed.
- **Documents**: Vendors upload proposals via a private link; you can attach agreements and confirmations — all stored and downloadable from the request.

How to Use

1. Click **New request** and fill in the title, category, scope (what vendors see), location, event date, and a respond-by deadline. Put the budget in the internal **Budget note** field under More options — vendors never see it.
2. Open the request and click **Add vendors**. Filter by keyword or city, select contacts, and choose email, SMS, or both. They land in the list as drafts.
3. Click **Send all drafts** to dispatch everything, or **Preview and send** on any row to review that message individually first.
4. Watch the Invite and Bid columns update as vendors submit quotes. Use **Shortlist** or **Reject** to manage the field; send a **Reminder** to anyone who hasn't replied.
5. Click **Award** on the winning bid. The request moves to Awarded and the next-steps panel appears.
6. From next steps: notify the winner, pass on the others, create a client quote, and place the booking order — each is a single button.
7. Upload or download supporting documents from the **Documents** section inside any request.
8. Click **Close this request** when done. You can reopen it any time.

Tips

- The scope description goes to every vendor as written — keep client name and budget out of it.
- The **Vendors tab** shows every contact you've ever invited and lets you add them to a new request in seconds.

- Vendor proposals uploaded through their private link appear automatically in Documents — no chasing email attachments.

DAM

Workflow

Workflow

Manage the complete file delivery pipeline for your DAM site — from incoming uploads through processing rules to outbound distribution. For an agency like ACME Creative Agency, this is where photographer feeds, processing steps, and client delivery destinations all connect.

Key Features

- **FTP In**: Manage the FTP accounts that receive incoming files from photographers, agencies, or automated feeds. Each user is assigned an action type — Process, List, or Archive — that controls how their uploads are handled.
- **FTP Out**: Configure remote servers where processed files are sent after passing through your pipeline. Each destination shows its host, login, priority, type, and error count. Toggle Active, Off, or Stopped without deleting the configuration.
- **Distribution Lists**: Define routing rules that link incoming FTP sources to outgoing destinations, with optional delivery delays and photo/video filtering.
- **Processing Rules**: Set up automatic actions applied to incoming files — rename templates, auto-rotation, auto-balance, folder organization, and asset classification per FTP source.
- **Web In**: Connect web upload portals to specific catalogs, so files submitted via browser are routed correctly. Monitor the error count column to catch failed ingestions.
- **Queue**: Monitor all outbound delivery tasks in real time. Color-coded status badges — Pending, Processing, Done, and Error — give you an instant read on what's moving and what needs attention.

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 Workflow 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 (Process, List, or Archive).
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 an outbound destination. Set a delay (in days) and choose whether the list handles photos, videos, or both.
6. In **Processing Rules**, assign rename templates, rotation, auto-balance, and folder handling for each incoming FTP source.
7. In **Web In**, connect a web upload source to a catalog and monitor error counts for failed ingestions.
8. In **Queue**, use the status filter to focus on errors or pending transfers and track delivery progress in real time.

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 configuration — useful when a client destination is temporarily unavailable.
- Check the **Queue** regularly — items stuck in "Error" status indicate a connection or permission issue on the destination server.
- Distribution Lists support a delay in days, useful when you need to embargo content before it reaches its destination.
- Processing Rules can keep the original folder structure or flatten it — use "Keep Folder" when your destination expects a specific directory layout.

CRM

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

Website

Your Website Address

Your Website Address

The Domain page is where ACME Creative Agency sets up a custom web address — like acmecreativeagency.com — for your site. Until you add one, your site runs on your free temporary address (acme-creative.air4.media). Either way, your site is live and working right now.

Key Features

- **Live address display**: The top of the page always shows your current web address and a direct "Open site" link so you can preview it instantly.
- **Domain search with live prices**: Type any name and see available options with real annual prices — no hidden fees or surprises.
- **Fully automatic setup**: Pay by card and Air4 handles everything — domain registration, DNS, and SSL — in about two minutes. Nothing else to do.
- **WHOIS privacy included free**: Your personal contact details are shielded from the public domain registry at no extra cost.
- **You own the domain**: The domain is registered in ACME Creative Agency's name. It belongs to you, not Air4.
- **Flexible connection**: If your site already has a custom domain, you can point a new one to the same site or create a brand-new site under it.
- **Temporary address stays active**: Your acme-creative.air4.media address never disappears — it keeps working as a backup even after you add a custom domain.

How to Use

To buy a new domain:

1. On the Domain page, click **Buy a domain**.
2. Type the name you want — for example, `acmecreativeagency` — and click **Search**.
3. Browse the results. Each card shows the domain name and its annual price. Click **Select** on the one you want.

4. Review the order summary: domain name, first-year price, renewal price, and WHOIS privacy (included free).
5. If your site already has a custom domain, choose whether to connect the new one to your existing site or spin up a brand-new site for it.
6. Click **Pay & activate** and complete the secure card payment.
7. Air4 registers the domain in your name and connects it automatically. The page updates when everything is live — usually within two minutes.

To keep your temporary address for now:

1. Click **Skip for now**. Your site stays live at acme-creative.air4.media with no changes.
2. Return to this page at any time to add a custom domain.

Tips

- **Not sure what to search?** The search box pre-fills with a name based on your site — it's a useful starting point.
- **Premium domains** — rare, high-value names — show a "contact us" badge instead of a buy button. Reach out and the team will handle it directly.
- **Domain transfers and connecting an existing domain** are coming soon. The buy flow is currently the fastest way to get a branded address.
- Once your custom domain is active, an **Active** badge appears at the top of the page. Your temporary address keeps working as a reliable backup — no need to update any existing links pointing to it.