

The screenshot shows the Air4media Pilot v10 dashboard. At the top, there are three summary cards: 'TOTAL REVENUE' at \$38,900, 'OUTSTANDING' at \$18,900, and 'OVERDUE' at 0. To the right, a 'PAID' card shows 10. Below these is a navigation menu on the left and a main table of invoices. The table has columns for Invoice #, Client, Issue Date, Due Date, Total, Balance Due, Status, Payment Options, and Actions. The invoices listed include various clients like X17 Agency and Air4.media Website, with dates ranging from 2025 to 2026. A 'Claude is active in this tab group' notification is visible at the bottom of the dashboard.

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

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

Quotes:

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

Invoices:

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

Contracts:

- Create and manage contracts linked to contacts or accounts
- Track contract status and expiration dates
- Attach documents and notes to contracts

Invoicing (Admin):

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

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