Pilot Documentation

Air4 Media — July 2026

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Features & Tools

Getting Started

Getting Started with Pilot

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

Key features include:

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

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

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

Sms A2p Client Onboarding

Air4 Media SMS (A2P 10DLC) — Client Onboarding & Approval Runbook

> Status: LIVE. First campaign APPROVED 2026-05-31 after a long compliance fight. Outbound + inbound both working. This runbook captures the exact requirements + gotchas so

> onboarding the next client is fast, not another 6-rejection saga.

1. The model (read first)

- **ONE Air4media brand + ONE approved A2P campaign covers the whole platform.** Broad "Mixed" use case: "*Air4 Media sends transactional/event SMS on behalf of its business customers who opt in via Air4-hosted forms.*" You do NOT register a new campaign per client.
- **Each client gets a dedicated 10DLC number** attached to the same Messaging Service (`MG37b5…`), all under the one approved campaign. Pilot routes each client's outbound SMS through their assigned number.
- **`company_phone_numbers` is the authoritative number → tenant registry.** Every client number is a row there (company_id, phone_number, twilio_sid, number_type, purpose, is_active). Inbound + outbound routing both consult it. NEVER hardcode a number→company mapping in code.
- **Air4media's own internal SMS (MFA, system/monitor alerts) stays on AWS SNS** — separate path, not Twilio.
- **Exception — own-brand sender:** if a client needs messages branded as *their* business name (not "Air4 Media") with their own consent language, that requires a SEPARATE Twilio brand + campaign. Heavier; only when explicitly needed. Default = ride the Air4media campaign.

Provider split

Recipient	Provider	Examples
Platform → own staff/users (operational)	**AWS SNS**	MFA codes, monitor/QA alerts
Tenant → opted-in consumers (A2P)	**Twilio**	event photo delivery, pocket booth, follow-ups, 2-way

Current registered assets

Thing	Value
Brand	Air4media LLC — `BN1b0174797046f80bd6fe6b19d4dd61d3` (TCR B5P0OXP, APPROVED)
Campaign	Console `CM12d058eebf1ad7e6862a8b1615da1667` / API `QE2c6890da8086d771620e9b13fadeba0b` (Mixed, APPROVED)
Messaging Service	`MG37b5e35fed3c74500e313a308ddf88f9`

Thing	Value
Numbers	+17606566636 ("760", PN88c993...) → **Coachella Party (company 10)**, registered in `company_phone_numbers`. +18882981641 ("800", toll-free) = Air4media/AWS context.
Twilio creds	`pilot/config/settings/api.php` → `$config['twilio']` (sid/token/phone_number; api_key_sid/secret preferred when present). Secrets in `/opt/air4-private/api.secrets.php`, www-data-only.

2. Compliance requirements (MUST-haves for every client)

Exact things TCR/carriers check. Miss one → rejection.

1. **Opt-in form** (Air4-hosted): required Phone field + an **OPTIONAL, unchecked-by-default** SMS consent checkbox, separate from any Terms agreement. Form submits with or without the box.
   - AirForms: add a `checkbox` field with `field_key = sms_consent`. The renderer auto-adds a compliance footer with privacy/terms links when that field is present (`form-render.php`, marker `airforms-sms-legal`).
2. **Consent text** must include: brand name, message types, "Message frequency varies", "Reply STOP to opt out, HELP for help", "Msg & data rates may apply".
3. **Dedicated SMS Privacy page**, VERBATIM (TCR string-matches): "*Mobile information and messaging consent are not shared with third parties or affiliates for marketing or promotional purposes.*" + CTIA catch-all. (Air4media: https://air4.media/sms-privacy)
4. **Dedicated SMS Terms page** with 9 CTIA elements + VERBATIM: "*Consumer data or message opt-in information is not shared, sold, or bought by third parties or affiliates.*" (https://air4.media/sms-terms)
5. **Opt-in form PAGE must show visible privacy + terms links** (footer auto-handles).
6. **Sample messages must MATCH the consent** — no off-scope content (caused error 30896).
7. **message_flow (Console "How do end-users consent") ≤ 1024 chars.** Hard limit.
8. **PrivacyPolicyUrl + TermsAndConditionsUrl set in CONSOLE only** — the API ignores them.

3. Step-by-step: add a client to SMS

1. **Provision a 10DLC number** in Twilio, attach to Messaging Service `MG37b5…`.
2. **Register it** in `company_phone_numbers` (company_id, phone_number E.164, twilio_sid, number_type `local`, purpose `airchat`, is_active 1, verification_status `approved`). THIS is what routes it to the tenant.

3. **Opt-in form:** ensure the client's Air4-hosted form has the `sms_consent` checkbox. Confirm the live form returns the privacy/terms links in raw HTML.
4. **Privacy/Terms pages:** reuse `/sms-privacy` + `/sms-terms`, or client-specific pages with the same verbatim phrases.
5. **Outbound routing:** Pilot sends tenant SMS via `SmsService::send($to,$body,'Air4media',['company_id'=>N])` → routed to Twilio on the tenant's number. (Router build — see §7.)
6. **Inbound:** point the number's webhook (number SmsUrl + Messaging Service InboundRequestUrl) at the inbound handler — see §7. The registry handles tenant routing automatically.
7. **No new campaign needed.** (Own-brand only: register a separate brand + campaign; repeat §2.)

4. Gotchas (hard-won — do not relearn)

- **Twilio help pages are JS-rendered.** Read via `r.jina.ai` (`curl https://r.jina.ai/https://help.twilio.com/...`).
- **Error 30882 (Terms) is "ineligible for resubmission."** Edit-resubmit can NOT clear it. Needs Trust & Safety to clear, or delete+recreate. Don't burn cycles.
- **Campaign API `date_updated`/`campaign_status` lag badly.** Diagnose from the errors array + Console.
- **WebFetch (Anthropic IP) gets 403 from air4.media** — Cloudflare bot list, NOT a real block. Verify external reachability via `r.jina.ai` or `curl --resolve air4.media:443:<CF_edge_IP>`.
- **Escalate to a human early.** Twilio Support → Trust & Safety cleared the stuck 30882 and expedited (Ticket 27367007, Sachin Singh). After 2 identical auto-rejections, open a ticket.

5. Monitoring

- `storage/services/scripts/twilio-a2p-monitor.php` — cron /30min, SMS+email to +17608085280 / laurent@coachellaparty.com on campaign status change. State in `storage/state/twilio-a2p-last.json`.

6. Charging — SMS as a paid onboarding + subscription add-on

SMS is a paid capability. Two revenue components (final prices are Laurent's call; these are the model):

A. One-time onboarding fee (covers real setup work):

- *Standard SMS onboarding* (rides the Air4media campaign): number provisioning + opt-in form wiring + compliance pages + registry + routing. **Suggested ~$99 one-time.**
- *Own-brand onboarding* (separate Twilio brand + campaign for the client, incl. TCR vetting + the multi-rejection risk): materially more work. **Suggested ~$499 one-time** + pass-through TCR fees.

B. Recurring + usage:

- Monthly SMS add-on per client: number rental (~$1.15/mo 10DLC) + campaign share + margin → **suggested ~$15/mo**.
- Outbound: ~$0.0079/segment carrier → bill **~$0.02/segment**; MMS ~$0.02 → bill **~$0.05**. Or sell bundled "SMS credits".

Billing wiring (platform layer — NOT yet implemented; next build):

- Add platform SKUs in `Ubermedia.products` (platform products sold to tenants — NOT tenant `crm_products`).
- Create an **`sms` package** in the package registry (kind=package), granted per company in Package Manager → projects to `site_module_activations` (the real per-site gate). Gate sending by PLAN/package, not tenant.
- On grant: provision number → register in `company_phone_numbers` → ensure opt-in form has `sms_consent`.
- Meter usage via the billing engine (or an "SMS credits" counter on `companies`).

7. Inbound (two-way) — receiving texts, photos & replies

- **Handler:** `pilot-beta/includes/handlers/sms-webhook-handler.php`. Validates Twilio signature, logs to `sms_inbound`, handles STOP/HELP/START (TCPA, writes `sms_blocklist` + `sms_consent_events`), routes to the tenant, creates/updates an AirChat conversation (channel=`sms`), and (if the tenant has `airchat_settings`) generates an AI reply sent back out via Twilio.
- **Multi-tenant routing:** `resolveRouting()` consults `company_phone_numbers` FIRST (number → company_id + owner user + site), then falls back to `companies.phone`, then the api.php default. Registry is authoritative.
- **Wiring a number for inbound:** set BOTH the number's `SmsUrl` AND the Messaging Service `InboundRequestUrl` to the handler URL (`UseInboundWebhookOnNumber=false` so the MG URL wins). Done for the 760 (2026; was previously pointed at Twilio's leftover demo URL — a number whose inbound still points at `demo.twilio.com` silently drops everything).

- **MMS:** the handler collects `MediaUrl{0..N}` + `MediaContentType` and stores them on the AirChat message. ⚠ Twilio media URLs **expire and require auth** — they are NOT durable. See §8.
- **Hardening TODO:** signature validation currently fails OPEN when no `X-Twilio-Signature` header is present ("dev mode"). Enforce in production. Also deploy the handler + its deps to `pilot/` and repoint to the `pilot/` URL (currently runs on the pilot-beta path).

8. MMS → DAM ingestion (SPEC — next build, not yet implemented)

Goal: a photo/video texted to a tenant's number lands in that tenant's DAM, multi-tenant, with metadata.

- Inbound MMS gives `MediaUrl{i}` (Twilio-hosted, **expiring**, needs Account SID/Auth Token to fetch).
- Ingestion must mirror `ftx-photographer-upload.php`: download media → temp file → `new MediaProcessor()` → read/stamp IPTC → `generateThumbnail` → upload original + thumb to the **tenant's Wasabi bucket** → `INSERT INTO dam_incoming` (in the tenant's DAM DB via `DamDatabaseResolver::resolveByCompany`).
- **Adaptation needed:** the photographer model keys off `dam_photographer_config` (a logged-in user). An SMS sender has no user/config. Define an **SMS ingestion source**: `dam_incoming.source = 'sms'`, a synthetic destination/template for the tenant (or a per-tenant "SMS inbound" destination), photographer_user_id = the company owner, caption/keywords from the sender number + body.
- **Prerequisite:** the tenant must have a DAM instance + bucket. COPA's DAM instance must exist before MMS ingestion will work; otherwise fall back to storing the downloaded file in a tenant-scoped path + an `sms_inbound`/AirChat record only.
- **Video caveat:** US carrier MMS caps media ~600KB–1.2MB. Real video won't arrive via MMS — text back an upload-link instead.

> Cross-ref: `storage/kb/sms-system-plan.md` (older two-way/threading design draft).

Sms System Plan

SMS System Plan — Text messaging for Pilot

> **Status**: Draft (2026-04-17) — pre-implementation **Goal**: Let tenants send/receive SMS (and MMS) from their Pilot account the same way they send emails, scoped to a company-owned Twilio number, threaded into conversations, and reachable from projects + contacts.

What already exists (audit — verified 2026-04-17)

Piece	Table/File	State	Notes
Inbound webhook capture	`sms_inbound`	1 row, basic	`from_number`, `to_number`, `message_body`, `raw_payload`, `processed` — no threading, no contact link
Per-company Twilio number	`company_phone_numbers`	1 row (Air4, +18882981641 toll-free, unverified)	`twilio_sid`, `number_type`, `purpose`, `verification_status` (pending/approved for 10DLC/toll-free)
Per-user Twilio creds	`user_email_settings.sms_*`	fields exist	BYO Twilio account path — likely deprecate for platform-managed model
Outbound stub (unused)	`outgoing_emails.message_type='sms'`	**0 rows of 304**	Dead path. AWS SNS, one-way, no threading.
System SMS	`config/core/mfa.php::sendSMS()`	in use (login MFA)	AWS SNS, no Twilio, direct send not queued
Planned (not built)	airchat-mobile-app.md	design only	`sms_conversations` + `sms_messages` in Phase 3 roadmap

Conclusion: Infrastructure is seeded but incoherent. Outbound, threading, and project/contact linking don't exist.

Architecture decision: separate SMS pipeline (NOT bolted onto email)

Reject reusing `outgoing_emails` for SMS threads. Reasons:

- Email queue is entity-based (one email per `entity_id`); SMS is thread-based (many messages per conversation).
- Email backends are SES/Gmail/SMTP; SMS backend is Twilio (already in `company_phone_numbers`).
- Compliance (STOP/HELP/START keywords, quiet hours, 10DLC/toll-free verification gating, opt-in audit trail) has no home in email schema.
- MMS media handling, delivery receipts, Twilio SIDs have no columns.

Keep `outgoing_emails` SMS stub retired. Migrate `sendSMS()` MFA path to the new pipeline in Phase 2.

Schema

```
-- Conversations / threads
CREATE TABLE sms_threads (
    id INT AUTO_INCREMENT PRIMARY KEY,
    company_id INT NOT NULL,
    company_phone_id INT NOT NULL,       -- FK company_phone_numbers.id (our number)
    peer_phone VARCHAR(20) NOT NULL,     -- E.164 customer number
    contact_id INT DEFAULT NULL,         -- FK contacts.id, nullable
    project_id INT DEFAULT NULL,         -- FK crm_projects.id, nullable (last linked project)
    status ENUM('active','resolved','closed','blocked') DEFAULT 'active',
    opt_in_status ENUM('unknown','opted_in','opted_out') DEFAULT 'unknown',
    opt_in_source VARCHAR(50) DEFAULT NULL,   -- 'web_form', 'verbal', 'reply_yes', etc.
    opt_in_at DATETIME DEFAULT NULL,
    opt_out_at DATETIME DEFAULT NULL,
    last_message_at DATETIME DEFAULT NULL,
    last_direction ENUM('inbound','outbound') DEFAULT NULL,
    unread_count INT DEFAULT 0,
```

```
    message_count INT DEFAULT 0,
    created_at TIMESTAMP DEFAULT CURRENT_TIMESTAMP,
    UNIQUE KEY uq_thread (company_phone_id, peer_phone),
    INDEX idx_company (company_id, status, last_message_at),
    INDEX idx_contact (contact_id),
    INDEX idx_project (project_id)
);

-- Individual messages (inbound + outbound)
CREATE TABLE sms_messages (
    id INT AUTO_INCREMENT PRIMARY KEY,
    thread_id INT NOT NULL,
    company_id INT NOT NULL,
    direction ENUM('inbound','outbound') NOT NULL,
    body TEXT,
    media_urls LONGTEXT,                 -- JSON array of Twilio media URLs
(MMS)
    twilio_sid VARCHAR(64) DEFAULT NULL, -- Twilio message SID (outbound or
inbound)
    status
ENUM('queued','sending','sent','delivered','undelivered','failed','received')
DEFAULT 'queued',
    error_code VARCHAR(20) DEFAULT NULL,
    error_message TEXT DEFAULT NULL,
    segment_count TINYINT DEFAULT 1,     -- Twilio reports num_segments
    price_amount DECIMAL(10,6) DEFAULT NULL,
    price_currency VARCHAR(8) DEFAULT NULL,
    sender_user_id INT DEFAULT NULL,     -- which user sent (outbound only)
    entity_type VARCHAR(40) DEFAULT NULL,--
'project','manual','campaign','mfa', etc.
    entity_id INT DEFAULT NULL,
    scheduled_at DATETIME DEFAULT NULL,
    sent_at DATETIME DEFAULT NULL,
    delivered_at DATETIME DEFAULT NULL,
    created_at TIMESTAMP DEFAULT CURRENT_TIMESTAMP,
    INDEX idx_thread (thread_id, created_at),
    INDEX idx_status (status, scheduled_at),
    INDEX idx_twilio (twilio_sid),
    INDEX idx_entity (entity_type, entity_id)
);

-- Company-level Twilio account credentials (one row per company that owns a
number)
CREATE TABLE company_twilio_credentials (
```

```
    company_id INT PRIMARY KEY,
    account_sid VARCHAR(64) NOT NULL,
    auth_token_encrypted TEXT NOT NULL,  -- encrypted at rest
    account_type ENUM('subaccount','byo') DEFAULT 'subaccount',
    messaging_service_sid VARCHAR(64) DEFAULT NULL, -- optional Twilio
Messaging Service
    webhook_secret VARCHAR(64) DEFAULT NULL,        -- validate inbound
webhooks
    created_at TIMESTAMP DEFAULT CURRENT_TIMESTAMP,
    updated_at TIMESTAMP DEFAULT CURRENT_TIMESTAMP ON UPDATE
CURRENT_TIMESTAMP
);

-- Templates (mirrors email_templates, SMS-specific)
CREATE TABLE sms_templates (
    id INT AUTO_INCREMENT PRIMARY KEY,
    company_id INT NOT NULL,
    name VARCHAR(100) NOT NULL,
    category VARCHAR(50) DEFAULT NULL,   -- 'project','onboarding','reminder'
    body TEXT NOT NULL,
    variables LONGTEXT,                  -- JSON array of {{vars}}
    is_active TINYINT(1) DEFAULT 1,
    created_at TIMESTAMP DEFAULT CURRENT_TIMESTAMP,
    INDEX idx_company (company_id, is_active)
);

-- Amend sms_inbound to link into the thread once processed
ALTER TABLE sms_inbound
    ADD COLUMN thread_id INT DEFAULT NULL AFTER id,
    ADD COLUMN message_id INT DEFAULT NULL AFTER thread_id,
    ADD INDEX idx_thread (thread_id);
```

Design notes:

- Thread uniqueness is `(company_phone_id, peer_phone)` — if the same customer texts two of our numbers, they're two threads (correct — different business contexts).
- `contact_id` and `project_id` are **denormalized last-link** on the thread, messages carry `entity_type/entity_id` for full history.
- `unread_count` surfaces sidebar badge without a join (same pattern as AirChat).

Backend services & files

New services

1. **`storage/services/scripts/sms-queue-service.php`** — daemon (Service Manager ID TBD, e.g. 30)

    - Polls `sms_messages WHERE status='queued' AND (scheduled_at IS NULL OR scheduled_at <= NOW())`
    - Sends via Twilio REST, stores `twilio_sid`, updates status → `sending` → (webhook updates to `sent/delivered/failed`)
    - Retry with exponential backoff (mirror email daemon pattern)
    - Respects 10DLC/toll-free verification: if `company_phone_numbers.verification_status != 'approved'`, queue stays held with `error_message='number_unverified'` (avoid Twilio carrier rejection)
    - Quiet hours honored: US rule = no marketing texts 9pm–8am recipient local time (phone-to-timezone lookup via area code or `contacts.timezone`)

2. **`pilot/includes/handlers/twilio-webhook-handler.php`** — public endpoint (validate signature)

    - Routes: `inbound-sms`, `status-callback`
    - Inbound: upsert `sms_threads`, insert `sms_messages(direction='inbound')`, increment `unread_count`, match contact by phone, trigger in-app notification
    - Auto-handles `STOP` / `START` / `HELP` keywords → sets `opt_in_status`, sends compliance auto-reply
    - Status callback: update `sms_messages.status` + `delivered_at/error_*`

3. **`pilot/includes/services/twilio-service.php`** — `TwilioService` class

    - Wraps Twilio REST (no SDK — use curl, like the rest of the codebase)
    - `sendMessage($companyId, $fromNumber, $to, $body, $mediaUrls=[])`
    - `purchaseNumber($companyId, $areaCode, $tollFree=false)`
    - `submitTollFreeVerification($companyPhoneId, $businessData)` → stores `verification_sid`
    - `checkVerificationStatus($companyPhoneId)` → polls + updates `verification_status`

4. **`pilot/includes/handlers/sms-handler.php`** — page/AJAX handler for SMS Management

  - Actions: `list_threads`, `get_thread`, `send_message`, `mark_read`, `link_contact`, `link_project`, `opt_out`

Modified

- `config/core/mfa.php::sendSMS()` → route through `TwilioService::sendMessage` (MFA becomes just another `entity_type='mfa'` outbound message). Retire AWS SNS.
- `outgoing_emails.message_type='sms'` → mark deprecated; optional cleanup migration later.
- Service Manager registry → add `sms-queue-service` (systemd daemon).
- AirChat mobile unified inbox → query `sms_threads` alongside airchat_conversations.

UI / touchpoints

Phase 1 surfaces (minimum viable)

1. **Project detail page** — "Send Text" button next to "Send Email"
   - Opens modal: pre-fills recipient from `project.primary_contact.phone`, template picker, variable substitution, send
   - Message stored as `entity_type='project', entity_id=<project_id>`, thread gets `project_id` updated
2. **Contact detail page** — "Send Text" button
   - Same modal, recipient = `contact.phone`, `entity_type='contact'`
3. **SMS Management page** (new, mirrors Email Management)
   - Tabs: Threads (default), Sent, Templates, Numbers, Compose
   - Threads tab: Air4List of `sms_threads` — columns: peer, contact name, last message preview, unread badge, status, last_message_at
   - Row click → thread detail modal: full message history + reply input (like AirChat conversation view)
   - Sent tab: Air4List of `sms_messages` where direction=outbound (with same eye-icon view action pattern we just added to email)
   - Numbers tab: manage `company_phone_numbers`, purchase new, submit verification
4. **Sidebar badge** — red pill on SMS menu item when `SUM(unread_count) > 0` (reuse `notification-badge-handler.php` pattern from AirChat)

Phase 2 surfaces

5. **Contact import/edit** — validate + normalize phone to E.164, track opt-in source
6. **Airmail campaigns** — add SMS channel (reuse templates, target `contacts` with opted-in phones)
7. **Quiet hours & timezone** — admin settings panel

Phases / milestones

Phase	Scope	Outcome
1	Schema migration + TwilioService + sms-queue daemon + webhook handler + STOP/HELP keywords	Can send/receive SMS end-to-end (via API only, no UI)
2	SMS Management page (Threads, Sent, Compose tabs) + sidebar badge	Can use SMS in browser
3	"Send Text" from project + contact pages + templates	Project/contact integration
4	Number management UI (purchase + toll-free verification submission)	Tenants self-serve 800 numbers
5	Airmail SMS campaigns + quiet hours + opt-in audit trail	Marketing-grade SMS
6	Retire `outgoing_emails` SMS stub + migrate MFA to sms_messages	Cleanup

Phase 1-3 is the MVP for "send texts from projects" requested in this conversation.

Compliance checklist (must-haves before Phase 2 ships)

- [ ] STOP keyword auto-handled → `opt_in_status='opted_out'`, auto-reply "You're unsubscribed..."
- [ ] START / UNSTOP re-opt-in
- [ ] HELP keyword → configurable auto-reply per company
- [ ] Block outbound when `opt_in_status='opted_out'` (hard gate, raise error)
- [ ] Block outbound when `company_phone_numbers.verification_status != 'approved'` for toll-free (Twilio rejects anyway)
- [ ] Audit trail: every outbound has `sender_user_id`, every opt-in change has source + timestamp

- [ ] Twilio webhook signature validation (prevent spoofed inbound)

Open decisions (need input)

1. **Twilio account model** — Air4 master account with per-tenant subaccounts (cleaner billing, we collect + mark up) vs BYO (tenants bring their own Twilio)? `user_email_settings.sms_*` suggests BYO path was started, `company_phone_numbers.twilio_sid` suggests platform-managed. **Recommend platform-managed subaccounts** — simpler tenant UX, enables us to resell.
2. **Per-user vs per-company phone numbers** — one shared company number (all users send from it) vs per-user numbers? Recommend **per-company** for v1, per-user later if needed.
3. **Service ID for sms-queue daemon** — next available (check service-registry.md).
4. **Credits/storage model** — should SMS consume AI credits? Or dedicated "SMS credits" counter on `companies`? Twilio costs ~$0.008/SMS + ~$0.02/MMS + verification fees.
5. **AirChat mobile integration** — fold SMS threads into unified inbox from day 1 (yes, already planned).

First implementation step

Once Open Decisions #1 + #4 are answered:

1. Write migration: `storage/migrations/2026-04-17-sms-system.sql` (create tables above)
2. Scaffold `TwilioService` with `sendMessage()` + auth wiring
3. Scaffold `sms-queue-service.php` daemon
4. Scaffold `twilio-webhook-handler.php` with signature validation + STOP/HELP
5. Manual end-to-end test: queue → send → webhook status callback → verify row updates
6. Then UI (Phase 2+)

Features & Tools

AI Agent

AI Agent

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

Key Features

- **Five Conversation Types**: Lead Qualification, Onboarding, Decision Helper, Follow-up, and Satisfaction Survey — each with a tailored conversational approach
- **Smart Chat Interface**: The AI asks questions one at a time in a natural tone. Press Enter to send; Shift+Enter adds a new line without sending
- **Automatic Analysis**: After 4+ exchanges, the AI silently builds a full profile — urgency score (out of 10), budget indicator, decision-maker status, detected motivations, recommended services, pricing tier, and a written summary
- **Auto-Completion**: When the AI has gathered enough to determine an outcome, it closes the conversation automatically
- **Shareable Links**: Generate a link for any conversation and send it to a contact — they can reply without needing an account
- **Outcome Tracking**: Each completed conversation is tagged Qualified, Not Qualified, Needs Nurturing, or Referred
- **At-a-Glance List**: The conversation list shows contact name, type, status, message count, urgency score, and outcome — scan priorities without opening each chat
- **Dashboard Stats**: See totals at a glance — Conversations, Active, Qualified leads, and Credits Used
- **Search & Filter**: Search through conversation summaries, or filter by type, status, or outcome; switch between table and card view
- **Bulk Delete**: Select multiple conversations and remove them in one step

How to Use

1. Click **Start Conversation** to open the setup dialog
2. Select a conversation type — for example, **Lead Qualification** for a new prospect inquiry
3. Choose a contact from the dropdown (e.g., a contact at ACME Creative Agency) and optionally link a project
4. Click **Start** — the AI opens with a personalized greeting and its first question
5. Type your replies in the chat box and press **Enter** to send
6. When the **"Analysis updated"** badge appears, the AI has generated insights — click the **chart icon** in the chat header to open the Analysis panel
7. The Analysis panel shows urgency score, budget indicator, decision-maker status, motivations, recommended services, pricing tier, and a written summary
8. Click **Complete** to close the conversation manually — or let the AI close it automatically once an outcome is reached

Sharing a Conversation

Open a conversation, click the **share icon** in the chat header, and the link is instantly copied to your clipboard. Send it to your contact — they can respond without logging in.

Tips

- The AI builds its analysis after at least 4 exchanges — the more a contact shares, the richer the insights
- Use **Lead Qualification** for new inquiries, **Decision Helper** when a prospect is comparing options, and **Satisfaction** after a project wraps up
- Filter by **Qualified** outcome to surface your hottest leads quickly
- The urgency score and outcome are visible directly in the list — no need to open each conversation to prioritize follow-ups
- Credits are consumed per AI response — keep an eye on the Credits counter in the stats bar

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AI Assistant

AI Assistant

The AI Assistant gives ACME Creative Agency's team direct access to leading AI models — Claude, ChatGPT, and a private local model — without leaving the platform. Ask questions, draft content, and get expert help all in one place.

Key Features

- **Multiple AI Models**: Choose from cloud models (Claude Sonnet, GPT-4o, and others) or a private local DeepSeek model that processes everything on-server. The model picker sits at the top of every session.
- **Prompt Templates**: Save and reuse prompt structures for recurring tasks. Select a template and your query is pre-filled automatically — great for consistent content requests or analysis tasks.
- **Backup Context**: Attach a saved file to give the AI background before it answers. Select from the Backup dropdown and its content is included automatically — useful for project briefs, past proposals, or reference material.
- **airA Prompt Enhancer**: Click **Enhance with airA** to transform a rough question into a precise, structured prompt using the 4-D methodology. Review and edit the enhanced version before sending.
- **File Management**: When the AI responds with code or structured files, the **File Management** tab on the right detects them automatically. Preview any file in full, then save it to your account with one click.
- **Query History**: The **History** tab shows recent conversations with timestamps and model badges. Click **View Details** on any entry to reload the full exchange — including every file extracted during that session.

How to Use

1. Open **AI Assistant** from the sidebar.
2. Choose an **AI Model** from the dropdown — *Claude Sonnet* for writing tasks, *GPT-4o* for broad knowledge, or the local model for sensitive internal content.
3. Optionally select a **Template** to pre-structure your prompt, or a **Backup** file to give the AI extra context.
4. Type your request in the **Query** box — for example, "*Draft a follow-up email for a client whose proposal has been pending two weeks.*"
5. Click **Enhance with airA** to refine the prompt, or go straight to **Send**.

6. The AI response appears in the conversation panel. Any files or code blocks in the response are automatically listed in the **File Management** tab on the right.
7. Click a file entry to preview it in full, then click **Save File** to keep it in your account.

Tips

- Use **Templates** to standardise how ACME's team phrases recurring requests — for example, a template for project scoping, tone reviews, or client email drafts.
- The local model (marked ▯) processes queries entirely on-server — a good choice for internal content you'd prefer not to send to a cloud service.
- Keep the Backup list tidy: use the pencil icon to rename a file or the trash icon to remove it.
- In the **History** tab, click **View Details** on any past query to reload the full conversation and see all files that were extracted at the time.

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 user is assigned one of six color-coded levels — **Guest**, **Pending**, **No Download**, **Web Download**, **Full Download**, or **Admin** — so you can see at a glance who can do what.
- **Approve Pending Accounts**: New self-registered users appear with a yellow **Pending** badge and a dedicated **Approve** button. One click grants them Web Download access 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 show only Pending users, only Full Download

users, or any other level — useful when auditing who has full 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 — they are upgraded to Web Download access 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 (e.g., upgrade from Web Download to Full Download).
3. Click **Save**. The badge on the row updates instantly.

Filter and Search

1. Use the **Level** dropdown to narrow the list — for example, select **Full Download** to review everyone with full access.
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 have Full Download.
- If a client should only view assets without downloading, set them to **No Download** 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.

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.

AirBeta

AirBeta

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

Key Features

- **Dashboard Stats**: Live counts of total applications, active testers, referrals, and average AI score at a glance
- **AI-Powered Scoring**: Every application is automatically scored on Fit (35%), Urgency (25%), Value (30%), and Referral bonus (10%) — totaling 0–100 with a tier recommendation
- **Follow-Up Questions**: Borderline applications (score 40–79) receive AI-generated follow-up questions to gather more context before a final decision
- **Application Pipeline**: Review, approve, reject, or waitlist applicants individually or in bulk
- **Tester Management**: View all active beta testers, their tiers, referral codes, feedback counts, and last-active status
- **Referral Leaderboard**: Track which testers are referring the most people, see conversion rates, and promote top referrers to higher tiers
- **Feedback Tracker**: Collect and triage bugs, ideas, improvements, and questions — with a top-reporters leaderboard
- **Email & Settings**: Customize automated email templates, preview them, send test emails, and manage referral rules

How to Use

Reviewing Applications

1. Click the **Applications** tab to see all incoming applications with AI scores and status badges
2. Click any row to open the full detail — including the score breakdown (Fit, Urgency, Value), AI rationale, and any follow-up answers
3. Select a **tier** (Explorer, Builder, or Pioneer) and optionally add review notes
4. Click **Approve**, **Reject**, or **Waitlist** — the applicant receives an automatic email
5. To act on many at once, check multiple rows and use the **Approve Selected** or **Reject Selected** batch buttons

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

Managing Testers

1. Click the **Testers** tab to see all approved testers
2. Filter by tier (Explorer, Builder, Pioneer) or status (Active, Inactive) using the filter bar
3. Click a tester to view their profile, referral code, referral history, and feedback count

4. Click the toggle icon on any row to activate or deactivate a tester instantly
5. Select multiple testers and click **Deactivate Selected** to remove access in bulk

Referrals

1. Click the **Referrals** tab to see overall stats (total referrals, conversions, conversion rate, participation rate) and the leaderboard
2. Each approved tester has a unique referral code — top referrers are ranked automatically
3. Testers who refer enough people earn tier upgrades:
    - 3 referrals → tier upgrade
    - 5 referrals → early access (direct to Pioneer)
    - 10 referrals → lifetime beta
4. Click the chain icon on any leaderboard row to see every person that tester referred
5. Click the upgrade arrow to check eligibility and apply a tier promotion manually

Feedback

1. Click the **Feedback** tab to see all tester submissions and the top-reporters leaderboard
2. Filter by type (Bug, Idea, Improvement, Question, Other), priority, or status
3. Click any item to read the full description, then update its **Priority** (Low → Critical) and **Status**
4. Status progression: Submitted → Reviewed → Planned → In Progress → Implemented → Shipped (or Won't Fix)
5. Select multiple items and click **Delete Selected** to remove resolved or irrelevant entries

Settings & Emails

1. Click the **Settings** tab to configure available spots, the application form headline, and referral rules
2. Select any lifecycle event (Application Received, Follow-Up Ready, Approved, Rejected, Waitlisted, Referral Success, Tier Upgraded, Inactive Reminder, Feedback Acknowledged) to edit its subject and body
3. Click **Preview** to see the rendered email, or **Send Test** to deliver a sample to your inbox
4. Use **Send Inactive Reminders** to re-engage testers who haven't been active in a set number of days

Tips

- The **Application Form** link (top right) opens the public apply page — share it with candidates to start filling your pipeline
- Approving an application automatically creates the tester record, issues a referral code, and sends a welcome email
- Borderline applicants (score 40–79) may receive follow-up questions — their answers feed into a re-evaluation before a final recommendation appears
- The master referral code (shown in the Referrals tab) gives applicants a bonus AI score boost at evaluation time
- Testers inactive for 7+ days can receive a win-back email via the **Send Inactive Reminders** button in Settings

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AirBlog — Blog Engine

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

Key Features

- **Post Editor**: Rich text editor with formatting, media embedding, live reading time, and auto-generated URL slugs. Preview posts on the live site before publishing.
- **Publishing Controls**: Draft, publish, schedule, or archive posts. Mark as featured or sticky. Set visibility to public, 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.

AirChat — AI Chatbot

AirChat is Pilot's AI-powered chatbot for automated customer support, grounded in your knowledge base.

Key Features

- **Multi-Provider AI**: Claude (Anthropic) as primary, with fallback to OpenAI and DeepSeek for reliability
- **Knowledge Base**: Add docs the AI uses to answer questions accurately about your business
- **Embeddable Widget**: Single script tag — no dependencies required
- **Conversation Persistence**: Sessions resume on reload; visitors browse past chats from the

widget header

- **Human Escalation**: Visitors request human support; you get an email, desktop notification, and audio alert. Reply from Pilot and the visitor sees it within 10 seconds
- **SMS Support**: Purchase a dedicated phone number from Settings to receive and reply to escalated chats via text message
- **Availability Toggle**: "Accepting Chats" toggle in Settings — when off, escalated visitors see a team-away message
- **Typing Indicators**: Real-time indicators so both sides know when the other is composing
- **Image Sharing**: Visitors can send images (PNG, JPG, WebP, GIF — up to 5MB)
- **Satisfaction Ratings**: Thumbs up/down on AI responses; overall stats shown in Conversations
- **Bug Tracker**: Visitors report bugs from the widget — track open/fixed counts and vote on priorities
- **Feature Requests**: Visitors submit ideas from the widget — vote to prioritize your roadmap
- **News Publishing**: Publish announcements visible in the widget's News tab
- **Email Capture**: Collect visitor emails automatically added to your CRM contacts and sales pipeline
- **Customization**: Bot name, persona, color, branding, team avatars, and domain restrictions

How to Use

Conversations

1. Open the **Conversations** tab to see all sessions
2. Filter by status (Active, Escalated, Awaiting Reply, Resolved, Closed) or by AI provider (Claude, OpenAI, DeepSeek)
3. Search by visitor name or email; click a conversation to view the thread and reply

Escalation Workflow

1. Visitor clicks "Human" or the AI detects low confidence → status becomes "Escalated"
2. You receive an email, desktop notification, and audio alert
3. Open the conversation in Pilot and type a reply — the visitor sees it within 10 seconds
4. Mark the conversation Resolved when done

Bugs & Feature Requests

1. Go to the **Bugs** or **Features** tab — view open/fixed stats at a glance

2. Filter by status (New, Reviewed, Planned, Fixed, Declined) or sort by votes
3. Click any item to update its status, add internal notes, and vote

Publishing News

1. **News** tab → **New News**
2. Add a title, summary, full content (markdown supported), an optional image URL, and an optional related page
3. Set category (New Feature, Update, Improvement, Fix) and visibility (Public or Beta Only)
4. Click **Save & Publish** or **Save as Draft**

Knowledge Base

1. **Knowledge Base** tab → **Add Entry**
2. Choose a category (General, Product, Support, Pricing, Technical, FAQ), add content, and optionally attach a screenshot (max 2MB)
3. Click **Sync KB** to rebuild the AI's knowledge index

Settings

- **Bot**: Name, AI provider, persona/system prompt, fallback toggle, Chat Active on/off
- **Widget**: Color, position, email capture mode and message, allowed domains
- **Branding**: Greeting, bot avatar, header logo, gradient color, team avatars (up to 4), help articles and news tab toggles
- **Phone**: Purchase a dedicated number to receive and reply to escalated conversations via SMS
- **Usage**: Monthly message count vs. your plan limit

Copy the embed snippet from the **Embed Code** tab and paste it before `</body>` on your site.

Tips

- A detailed bot persona improves response quality and tone
- Enable provider fallback so the widget stays up if one AI provider goes down
- Use "Required" email capture so every visitor is added to your CRM and pipeline automatically
- Turn off "Accepting Chats" when your team is away — visitors get an honest message
- Use the "Chat Active" toggle to disable the widget temporarily without touching your embed code

- Publish news items regularly to keep visitors informed directly in the widget

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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.

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 all registered users with access levels; 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 to grant Web Download access
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
- Access levels range from Guest and Pending up to No Download, Web Download, Full Download, and Admin — review these before approving new users
- A red error badge on a Stats destination means delivery has failed — use **Activate** to retry
- If no site is selected, a prompt appears — pick a site from the topbar to activate the module

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AirDoc

AirDoc

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

Key Features

- **KB Article Library**: Browse all knowledge base articles in one table with 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.

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

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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

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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.

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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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.

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.

Architecture Diagrams

Architecture Diagrams

The Architecture Diagrams page gives you a live, browsable view of 19 interactive diagrams that document how the Air4.media platform is built — covering data models, system integrations, deployment structure, workflows, and more. It's a single place to explore and understand the platform's technical blueprint without leaving your browser.

Key Features

- **Diagram browser**: A scrollable sidebar lists all 19 diagrams alphabetically, showing the name, file size, and last-modified date for each one.
- **Instant preview**: Click any diagram in the sidebar to load it immediately in the large viewer panel on the right — no page reload needed.
- **Search filter**: Type in the search box at the top of the sidebar to narrow the list by name. Useful when you know what you're looking for (e.g. type "sequence" to find all sequence diagrams).
- **Keyboard navigation**: Use the ↑ and ↓ arrow keys to move between diagrams in the sidebar without touching the mouse.
- **Open in new tab**: Click **Open in New Tab** to launch the current diagram full-screen in a separate browser tab — ideal for a closer look or sharing a link.
- **Refresh**: Click **Refresh** to reload the current diagram, useful if the content has been recently updated.

Diagram Categories

The 19 diagrams cover six areas of the platform:

- **Data Model** — how records (contacts, invoices, assets, sites, users) relate to each other
- **Domain-Driven Design (DDD)** — bounded contexts and domain boundaries
- **Deployment** — infrastructure, servers, and service topology
- **Sequences** — step-by-step flows for key operations (e.g. sending an email, processing a payment)
- **State Machines** — how objects like invoices and emails move through statuses
- **Integrations** — connections to external services such as Stripe and AWS

How to Use

1. Open **Architecture Diagrams** from the sidebar menu.
2. Browse the list on the left — you'll see all available diagrams with their names and update dates.
3. Use the **search box** to filter by keyword if needed.
4. Click a diagram title to load it in the viewer.
5. Interact with the diagram directly in the viewer — most diagrams support zooming and panning.
6. To view a diagram at full size, click **Open in New Tab** in the top-right corner.

Tips

- Use arrow keys to quickly cycle through diagrams without moving your cursor away from the viewer.
- The **Open in New Tab** button is handy when comparing two diagrams side by side — open one in a tab, then select another in the main view.
- The last-modified date next to each diagram title tells you when it was last updated.

Developer

AssetConnector — Reusable Media Asset Upload Service

AssetConnector

File: `config/core/asset-connector.php`
Version: 10.01
Type: Singleton PHP class
Purpose: One unified class to upload ANY file to `crm_assets` from anywhere in the system.

Why It Exists

Before AssetConnector, every module that needed to upload files (Assets Manager, AirBlog, AirMail, FotoTrafiX API, Company Management logo upload, AI image generation) had its own copy of the upload logic — 300+ lines of metadata extraction, S3 upload, DB insert, and collection linking, each with slightly different path construction, error handling, and validation. This caused recurring bugs (wrong paths, missing thumbnails, broken S3 keys) and made maintenance painful.

AssetConnector centralizes all of this into a single class with one main method: `store()`.

Quick Start

```
// Get the singleton
$connector = AssetConnector::getInstance($mysqli);

// Upload from browser form ($_FILES)
$result = $connector->storeUpload('file', $companyId, $siteId, $userId);

// Upload from a local file path
$result = $connector->storeFile('/tmp/photo.jpg', $companyId, $siteId,
$userId);

// Upload from binary content (API response, AI-generated, etc.)
$result = $connector->storeContent($binaryData, 'image.png', $companyId,
$siteId, $userId);
```

All three return the same format:

```
// Success
[
    'success'  => true,
    'asset_id' => 447,
    'asset'    => [
        'id'                => 447,
        'company_id'        => 10,
        'site_id'           => 21,
        'filename'          => 'my_photo_6613a4b2e1f3c.jpg',
        'original_filename' => 'My Photo.jpg',
        'file_path'         =>
'https://s3.us-west-1.wasabisys.com/pilot-air4.media/companies/copa/protected
/sites/21/assets/2026/03/my_photo_6613a4b2e1f3c.jpg',
        'thumbnail_path'    =>
'https://s3.us-west-1.wasabisys.com/pilot-air4.media/companies/copa/public/si
tes/21/assets/2026/03/thumbs/thumb_6613a4b2e1f3c.jpg',
        's3_key'            =>
'companies/copa/protected/sites/21/assets/2026/03/my_photo_6613a4b2e1f3c.jpg'
,
        's3_key_thumb'      =>
'companies/copa/public/sites/21/assets/2026/03/thumbs/thumb_6613a4b2e1f3c.jpg
',
        'file_size'         => 2456789,
        'mime_type'         => 'image/jpeg',
        'asset_type'        => 'image',
        'width'             => 4032,
        'height'            => 3024,
        'title'             => 'Sunset at Venice Beach',
        'collection_id'     => 12,
    ],
]

// Failure
[
    'success' => false,
    'error'   => 'File too large. Max: 50 MB, got: 72.3 MB',
]
```

The `store()` Method — Full Options

```
$result = $connector->store([
    // ── SOURCE (one required) ──
    'file_key'     => 'logo',            // $_FILES key
    'local_path'   => '/tmp/file.jpg',  // absolute path on server
    'content'      => $binaryData,      // raw file content

    // ── REQUIRED ──
    'company_id'   => 10,               // company that owns this asset
    'site_id'      => 21,               // site association
    'user_id'      => 7,                // who uploaded it

    // ── FILE INFO (optional) ──
    'filename'     => 'custom.png',     // required with 'content', optional
otherwise
    'original_name'=> 'My File.png',    // display name (auto-detected if
omitted)

    // ── METADATA OVERRIDES (optional) ──
    'title'        => 'Company Logo',   // overrides EXIF title
    'description'  => 'Our brand logo', // overrides EXIF description
    'tags'         => 'logo,branding',  // MERGED with EXIF tags (not
replaced)
    'category'     => 'branding',       // asset category
    'copyright'    => '© 2026 Copa',    // overrides EXIF copyright
    'creator'      => 'John Smith',     // overrides EXIF creator
    'alt_text'     => 'Copa logo',      // accessibility text

    // ── S3 STORAGE (optional) ──
    'module'       => 'assets',         // S3 path segment: assets, airblog,
airmail, etc.
    'visibility'   => 'protected',      // 'public' or 'protected' (default:
protected)
    'subfolder'    => 'logos',           // extra path segment in S3 key

    // ── COLLECTION (optional) ──
    'collection'   => 'Company',        // name (auto-creates album) or int
(collection_id)
    'collection_type' => 'album',       // type for auto-created collections

    // ── PORTAL (optional) ──
    'portal_visible'   => false,        // show in AirPortal client view
```

```
    'download_enabled' => true,          // allow portal download
    'account_id'       => null,          // CRM account FK
    'project_id'       => null,          // CRM project FK

    // ── PROCESSING (optional) ──
    'skip_metadata'      => false,       // skip EXIF/IPTC extraction
    'skip_thumbnail'     => false,       // skip thumbnail generation
    'skip_transcription' => true,        // skip Whisper transcription
(default: true)

    // ── VALIDATION (optional) ──
    'max_size'         => 10485760,      // override max file size (bytes)
    'allowed_types'    => ['jpg','png'], // override allowed extensions
]);
```

Supported File Types

Type	Extensions	Max Size
Image	jpg, jpeg, png, gif, webp, svg, bmp, tiff, tif, ico	50 MB
Video	mp4, mov, avi, webm, mkv, m4v, wmv, flv, mpg, mpeg	500 MB
Audio	mp3, wav, aac, ogg, flac, m4a, wma	100 MB
Document	pdf, doc, docx, xls, xlsx, ppt, pptx, txt, csv, rtf, odt, zip, gz, etc	100 MB

What It Does Automatically

1. File Validation

- Checks file exists and uploaded without error
- Validates extension against allowed types
- Enforces size limits (per-type defaults or custom override)

2. Metadata Extraction (via MediaProcessor)

- **Images:** EXIF, IPTC, XMP — title, description, keywords, copyright, creator, camera make/model, capture date, ISO, aperture, focal length, GPS coordinates
- **Videos:** Duration, dimensions, codec info + optional Whisper transcription + AI keyword extraction
- **Documents/Audio:** MIME type detection only
- All metadata stored in `crm_assets.exif_data` as JSON

- Search content auto-generated from title + description + tags + transcript

3. Thumbnail Generation (via MediaProcessor)

- **Images:** JPEG at 400px width, quality 85
- **Videos:** WebP at 400px width, quality 65
- **SVG:** No thumbnail needed (renders at any size)
- **Documents/Audio:** No thumbnail

4. S3 Upload (via StorageService)

- Original file → `protected/` prefix (or `public/` if specified)
- Thumbnail → `public/` prefix (always accessible)
- Path convention: `companies/{slug}/{visibility}/sites/{siteId}/{module}/YYYY/MM/{filename}`
- Storage quota enforced (increments `companies.storage_used_bytes`)
- Thumbnails don't count toward quota

5. Database Insert

- Full record in `crm_assets` with all metadata columns
- Both `file_path` (full URL) and `s3_key` (raw key) stored
- `processing_status` set to `completed`
- `storage_provider` set to `wasabi`

6. Collection Linking (optional)

- Pass `'collection' => 'Company'` to auto-find or create an album
- Pass `'collection' => 42` to link to existing collection by ID
- Auto-sets cover image if collection has none
- Uses `crm_asset_collection_items` junction table with `display_order`

Convenience Methods

`storeUpload($fileKey, $companyId, $siteId, $userId, $extra = [])`

Shorthand for `$_FILES` uploads:

```
$result = $connector->storeUpload('file', 10, 21, 7, [
    'collection' => 'Company',
```

```
    'visibility' => 'public',
]);
```

`storeFile($localPath, $companyId, $siteId, $userId, $extra = [])`

Shorthand for server-side files:

```
$result = $connector->storeFile('/var/www/air4.media/tmp/export.pdf', 10, 21,
7, [
    'category' => 'exports',
    'skip_metadata' => true,
]);
```

`storeContent($content, $filename, $companyId, $siteId, $userId, $extra = [])`

Shorthand for binary data:

```
// AI-generated image
$result = $connector->storeContent($dalleResponse, 'ai-generated.png', 10,
21, 7, [
    'title' => 'AI Generated: sunset beach',
    'tags' => 'ai,generated,dalle',
    'collection' => 'AI Generated',
]);
```

`ensureCollection($name, $companyId, $siteId, $userId, $type = 'album')`

Get or create a collection by name. Returns collection ID:

```
$collectionId = $connector->ensureCollection('Company', 10, 21, 7);
// Returns existing ID if "company" slug exists, creates new album otherwise
```

`delete($assetId)`

Delete an asset and all its S3 files:

```
$result = $connector->delete(447);
// Deletes: original from S3, thumbnail from S3, DB record
// Cascade: removes from crm_asset_collection_items
// Decrements: companies.storage_used_bytes
```

Usage Examples

Company Logo Upload

```
require_once $resolver->resolve('config/core/asset-connector.php');
$connector = AssetConnector::getInstance($mysqli);

$result = $connector->storeUpload('logo', $companyId, $siteId, $userId, [
    'collection'     => 'Company',
    'visibility'     => 'public',
    'title'          => $companyName . ' Logo',
    'tags'           => 'logo,branding,company',
    'category'       => 'branding',
    'skip_metadata'  => true,
    'skip_thumbnail' => false,
    'allowed_types'  => ['jpg', 'jpeg', 'png', 'gif', 'svg', 'webp'],
    'max_size'       => 5 * 1024 * 1024, // 5MB
]);

if ($result['success']) {
    // Update company record with the S3 URL
    $stmt = $mysqli->prepare("UPDATE companies SET logo_path = ? WHERE id =
?");
    $logoUrl = $result['asset']['file_path'];
    $stmt->bind_param('si', $logoUrl, $companyId);
    $stmt->execute();
}
```

Blog Post Image

```
$result = $connector->storeUpload('featured_image', $companyId, $siteId,
$userId, [
    'module'     => 'airblog',
    'visibility' => 'public',
    'collection' => 'Blog Images',
    'title'      => $postTitle . ' — Featured Image',
]);
```

FotoTrafiX Batch Import

```
foreach ($files as $filePath) {
    $result = $connector->storeFile($filePath, $companyId, $siteId, $userId,
```

```
[
        'collection'         => $eventName,
        'skip_transcription' => true,
    ]);
    if (!$result['success']) {
        logError("Import failed for {$filePath}: " . $result['error']);
    }
}
```

Email Attachment

```
$result = $connector->storeContent($attachmentData, $attachmentName,
$companyId, $siteId, $userId, [
    'module'    => 'airmail',
    'category' => 'email-attachment',
    'subfolder' => 'attachments',
]);
```

Architecture

```
AssetConnector (singleton)
├── resolveSource()        → normalize file from $_FILES / path / binary
├── detectAssetType()      → image / video / audio / document / other
├── extractMetadata()      → MediaProcessor (EXIF/IPTC/XMP)
├── generateThumbnail()    → MediaProcessor (ImageMagick/FFmpeg)
├── uploadToS3()           → StorageService → WasabiApi
├── insertRecord()         → crm_assets INSERT
├── resolveCollection()    → find or create crm_asset_collections
└── linkToCollection()     → crm_asset_collection_items INSERT
```

Dependencies

Class	File	Role
`StorageService`	`config/core/storage-service.php`	S3 path construction, upload, quota
`WasabiApi`	`config/core/wasabi-api.php`	Low-level S3 SDK wrapper
`MediaProcessor`	`config/core/media-processor.php`	EXIF extraction, thumbnail generation
`PathResolver`	`config/core/path-resolver.php`	Resolve file paths

Database Tables

Table	Role
`crm_assets`	Main asset records
`crm_asset_collections`	Albums, galleries, catalogs
`crm_asset_collection_items`	Junction table (asset ↔ collection)
`companies`	Storage quota tracking (`storage_used_bytes`)
`company_storage_log`	Storage change audit trail

Error Handling

- All errors are caught and returned as `['success' => false, 'error' => '...']`
- Errors are logged via `logError()`
- Temp files are always cleaned up, even on failure
- Non-fatal errors (metadata extraction, thumbnail generation) are logged as warnings but don't fail the upload
- S3 upload failure IS fatal — no orphaned DB records

S3 Path Convention

```
companies/{company-slug}/{visibility}/sites/{siteId}/{module}/YYYY/MM/{filename}
                                 │                                   │
                                 │                                   └─ assets, airblog, airmail, etc.
                                 └─ public (thumbnails, public assets)
                                    protected (originals, private assets)

Thumbnails:
companies/{company-slug}/public/sites/{siteId}/{module}/YYYY/MM/thumbs/{filename}
```

Notes

- **Singleton:** Use `AssetConnector::getInstance($mysqli)`. Call `AssetConnector::reset()` if you need a fresh instance (rare).
- **Tags are merged:** If EXIF has keywords AND you pass `'tags' => 'custom'`, both are kept.

- **Title/description override:** If you pass these options, they REPLACE what EXIF extracted.
- **Collection auto-creation:** Collections are matched by `slug` (lowercased, hyphenated). "Company" → slug "company". If found, reuses existing. If not, creates new.
- **No double-uploads:** Files are sanitized with uniqid suffix, so same-name files never collide.
- **Storage quota:** Enforced by StorageService before S3 upload. If company is over quota, upload fails.

Features & Tools

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**: All assets are stored on Wasabi S3 for reliable, fast 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

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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

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Backup

Backup

The Smart Backup System lets you save and restore your platform's files and database at any point in time. Use it before making major changes, or routinely to keep your account safe.

Key Features

- **Complete Backup**: Captures everything — all system files and the full database — in one click.
- **Selective Backup**: Choose exactly what to include: AI reference files, specific system folders, individual pages and their assets, or selected database tables.
- **Backup History**: View all saved backups with their date, type, and size. Each entry shows

action buttons to view details, restore, download, or delete.

- **Backup Details**: Open any backup to browse its file structure, database tables, and individual files. Add a note to label what changed.
- **Restore**: Roll back files or database tables to any saved point. Optionally create an automatic safety backup first.
- **Download**: Save any backup as a file to store off-server.
- **Send to AI Assistant**: Share a backup's file structure with the AI Assistant for context when troubleshooting.

How to Use

Creating a Backup

1. Go to **Backup** from the sidebar.
2. Choose a backup type:
   - **Complete Backup** — backs up everything automatically.
   - **Selective Backup** — reveals options to pick specific components.
3. If using Selective, check the items to include:
   - **Air4lib Context** — reference files used by the AI Assistant.
   - **Core Files** — pick individual system folders (Components, Views, Config, etc.).
   - **Pages** — select specific pages; expand any page with the arrow button to choose individual files (views, handlers, scripts, styles). Use the list/detail toggle at the top to switch between compact and expanded views.
   - **Database** — choose tables and whether to back up their structure, data, or both.
4. Click **Create Backup**. A progress bar confirms the backup is running. The new entry appears in Backup History when done.

Viewing Backup Details

1. In the **Backup History** panel, click the **info icon** next to any backup.
2. Browse tabs for **File Structure**, **Database**, and **Files**.
3. Use **Copy Structure** to copy the file tree to your clipboard.
4. Add or edit a **comment** to label the backup, then click **Save Comment**.

Restoring from a Backup

1. Click **Restore from Backup** at the top of the page, or click the restore icon next to any backup in history.

2. Select a backup from the list on the left.
3. Choose which **files** and **database tables** to restore using the Files and Database tabs.
4. For database tables, decide whether to restore structure, data, or both. Note: restoring structure will drop and recreate those tables.
5. Leave **Create backup before restore** checked to save your current state first.
6. Click **Start Restore** and wait for the confirmation message.

Downloading or Deleting a Backup

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

Tips

- Run a Complete Backup before any significant configuration change or platform update.
- Use comments to label what changed — for example, "Before invoice template redesign" or "After adding new contact fields."
- Always keep **Create backup before restore** checked — it gives you a fallback if the restore doesn't go as expected.
- Backups are automatically removed after 30 days.
- Use **Send to AI Assistant** to share a backup's file structure with the AI for context when troubleshooting — you'll be prompted to open the AI Assistant right away.

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

Booking Settings

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

Key Features

- **Availability Schedule**: Define which days and hours you're open for bookings. Clients only see time slots that fall within your schedule. ACME Creative Agency starts with Monday–Friday, 9 am–5 pm by default.
- **Appointment Types**: Set default durations and buffer times for each meeting type (Consultation, Site Visit, Meeting, Call, Demo, Follow-up) and choose which ones clients can request.
- **General Settings**: Control your daily booking limit, minimum advance notice, how far ahead clients can schedule, and your timezone.
- **Booking Link**: A shareable URL clients use to self-book directly on your calendar — copy it and drop it in an email or on your website.
- **Weekly Preview**: A live summary on the right showing each day as open or unavailable as you edit your schedule.

How to Use

Set Your Availability

1. Go to **Booking Settings** in the sidebar.
2. In the **Availability Schedule** section, each row is a time block. New accounts start with Monday–Friday, 9 am–5 pm.
3. Select the **day** from the dropdown, then set the **start** and **end times**.
4. Use the toggle switch on a row to enable or disable that block without deleting it.
5. Hover over a row to reveal the **trash icon**, then click it to remove that block permanently.
6. Click **Add Time Slot** to add more blocks — useful for split schedules (e.g., a morning and afternoon window on the same day).
7. Click **Save Changes** in the Availability Schedule header when done.

Configure Appointment Types

1. In the **Appointment Types** table, find the type you want to adjust.
2. Set the **Duration** (minutes) — how long that appointment lasts.
3. Set the **Buffer** (minutes) — the gap after that appointment before the next can start.
4. Check or uncheck **Bookable** to control whether clients can request that type. Follow-up is off by default.

Update General Settings

1. In the **General Settings** panel on the right, set:
    - **Max Bookings Per Day** — your daily cap on appointments (default: 8).
    - **Minimum Advance Notice** — how many hours ahead a client must book (default: 24).
    - **Max Days in Advance** — how far into the future clients can schedule (default: 60).
    - **Timezone** — your local timezone so availability displays correctly for you and your clients.

Share Your Booking Link

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

Tips

- Add two time blocks for the same day if you take a midday break — for example, 9 am–12 pm and 1 pm–5 pm.
- Buffer times protect you from back-to-back appointments with no break in between.
- Set a minimum advance notice (e.g., 24 hours) to avoid last-minute booking requests.
- The Weekly Preview updates live as you edit — check it before saving to confirm your schedule looks right.
- Uncheck **Bookable** on types you handle internally (like Follow-up calls) to keep your public booking page focused on what matters most to clients.

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

Budgets

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

Key Features

- **KPI Summary Cards**: See your total annual budgets, total amount spent, total revenue collected, and overall profit & loss at the top of the page. The P&L value and icon turn green when positive and red when negative.
- **Monthly Objectives Grid**: Set company-wide monthly spending and revenue targets for any year, side by side with actual figures. Four rows span each month: budget target, actual expenses (with % of target), revenue target, and actual revenue (with % of target). Edit any target cell directly — changes save automatically after a moment.
- **Monthly Trend Chart**: A 12-month bar chart comparing expenses vs. revenue so you can spot seasonal patterns at a glance.
- **Expense Breakdown**: A visual breakdown of spending by category (Equipment, Labor, Venue, Travel, Materials, Subcontractor, Software, Insurance, Marketing, Other) showing each category's share of total costs.
- **Revenue per Year**: A horizontal bar chart showing realized revenue for each calendar year across your full history, with the current year highlighted.
- **Project Budgets Table**: A sortable table listing every project with its account, annual budget, total spent, percentage used (with a progress bar), revenue target, actual revenue, and P&L. Each project shows a status badge: **Under**, **On Target**, or **Over** budget.
- **Recent Expenses**: The 10 most recent expenses across all projects, with category, date, and amount.
- **Add Expense**: Log a new expense against any project directly from this page.
- **Export**: Download the full project budget table as a CSV file.

How to Use

Reading the dashboard

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

Setting monthly objectives

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

Logging an expense

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

Viewing project details

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

Exporting data

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

Tips

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

annual targets.

- The Revenue per Year chart lets you compare performance across multiple years at a glance.

Business Setup

Business Setup

A guided three-step wizard that connects your domain, email, and payment processing so your business is ready to 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 — Customer Relationship Management

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

CRM Modules:

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

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

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

Calendar

Calendar

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

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

Campaigns

Campaigns

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

Key Features

- **Dashboard Stats**: See total campaigns, how many were sent this month, your average open rate, and how many are scheduled at a glance.
- **Campaign Types**: Organize campaigns by type — Newsletter, Announcement, Welcome Series, Promotion, or Transactional.
- **Flexible Recipients**: Send to all active subscribers, specific subscriber lists, or filter by tags. 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.

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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Claude Code Dashboard

Claude Code Dashboard

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

Key Features

- **Sessions Tab**: See every Claude Code session with status, machine, project, model, message count, and estimated cost at a glance
- **Plans Tab**: Review and manage AI development plans with priority, status, tags, and execution logs
- **Live Stats**: Summary cards show total sessions, sub-agent count, messages, tokens, estimated cost, data size, status breakdown, and days since your first session
- **Filtering**: Narrow the list by session status, machine (AWS Server or MacStudio), or AI model (Opus, Sonnet, Haiku)
- **Search**: Find sessions by keyword — searches across summaries, project names, slugs, and session IDs
- **Session Detail**: Click any session to read the full conversation history, including tool use, token counts, and per-message cost breakdown
- **Live Chat**: Open a chat panel to start a new Claude Code session or resume an existing one with real-time streaming responses
- **Chat Attachments**: Attach files (up to 500KB), platform source code, KB documents, or URLs as context before sending a message
- **Page Screenshots**: Capture a screenshot of any platform page directly from the dashboard

Session Statuses

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

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

How to Use

Sessions

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

Plans

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

Tips

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

- Use **Refresh** in the toolbar to reload both stats and the session list with the latest data

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Clients

Clients

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

Key Features

- **KPI Summary Bar**: Six live counters at the top — Total Accounts, Active Clients, Prospects, Active Projects, Pipeline Value, and Total Revenue — so you always know where you stand.
- **Active Projects Timeline**: A visual Gantt-style chart showing all in-progress projects across their date ranges. Click any project bar to jump straight to the project detail.
- **Revenue Trend**: A 6-month bar chart of collected payments with a badge showing how this month compares to last month (e.g. +12% vs last month).
- **Pipeline Funnel**: A breakdown of your active deals by stage — Lead, Proposal, Contracted, In Progress, On Hold — with project counts and estimated values per stage.
- **Today's Appointments**: All appointments scheduled for today, listed by time.
- **Quote Win Rate**: A 90-day scorecard showing how many quotes were accepted, declined, or are still pending, plus your overall win percentage.
- **This Week's Activity**: A running count of calls made, emails sent, meetings held, and tasks completed since Monday.
- **Upcoming Events**: Project-linked events happening in the next 14 days, with dates and venue info.
- **Recent Activity Feed**: A live stream of the last 15 actions across all accounts — calls, emails, notes, payments, status changes, and more.
- **Overdue Invoices**: An alert card (shown only when needed) listing past-due invoices with days overdue and total amount outstanding.
- **Tasks & Follow-ups**: Your pending calls, follow-ups, meetings, and tasks. Click the icon on any task to mark it complete without leaving the dashboard.
- **Budget Status**: For projects with monthly budgets or revenue targets, a progress bar shows whether you're under, on track, or over for the current month.

- **Expiring Contracts**: Contracts reaching their end date within 30 days appear here as a heads-up (hidden when none are expiring soon).
- **Recently Active Accounts**: The five accounts with the most recent activity, with type badge (client, prospect, lead) and total revenue.
- **Import Contacts**: Upload a CSV file to bulk-import contacts. Preview and map your columns before importing, with an option to update existing records matched by email address.

How to Use

1. Open **Clients** from the sidebar to see your full dashboard.
2. Check the **KPI bar** at the top for a quick health check of your accounts and pipeline.
3. Review the **Timeline** to see which projects are active and where they fall in the calendar.
4. Use the **Pipeline Funnel** to spot where deals are concentrated and click **View Board** to manage them.
5. Check **Tasks & Follow-ups** and click the task icon to complete items directly from the dashboard.
6. If the **Overdue Invoices** card appears, address those accounts promptly.
7. To add contacts in bulk, click **Import** in the top-right, upload your CSV, map the columns, and confirm.

Tips

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

Clients Dashboard

Clients Dashboard

Your central command center for managing clients, projects, revenue, and team activity. 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.

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.

Company Management

Company Management

A platform-level tool for creating and managing client companies, their members, subscription plans, and enabled modules. Everything about a company like ACME Creative Agency — its team, plan, active modules, and AI credits — is managed from this single page.

Key Features

- **Company List**: Sortable columns for name, owner, plan, user count, site count, storage, modules, beta status, and creation date. Search by name or email; filter by status, plan, or beta status.
- **Add & Edit Companies**: Three-tab modal — Details (name, logo, owner, contact info), Plan & Options (subscription plan, Beta, Startup Package, AI Credits), and Modules (CRM, DAM, Airmail, Airblog, Airforms).
- **Logo**: Upload or pick from existing assets (JPG, PNG, GIF, SVG, or WebP — up to 5 MB). A preview appears instantly; click Remove to clear it.
- **Plan & Options Tab**: Shows Beta Tester, Startup Package, and AI Credits in a table — each with its current status, activation date, and expiry date. Toggle each add-on with a single click.
- **Beta & Startup Package**: Toggle per company from the Plan & Options tab. Beta companies get plan features for free and display their AI credit balance in the list.
- **Grant Credits**: Add AI credits to any company from its list row or the Plan & Options tab.
- **Member Management**: Add existing users, invite by email (7-day link), change roles, and remove members — all from the Members panel.
- **Auto-Join**: Invited users are added automatically when they log in or sign up with their invited email — no link click required.
- **Sites View**: See all sites linked to a company and their current status.
- **Bulk Actions**: Select multiple companies to activate or suspend at once.

How to Use

Add a Company

1. Click **Add Company** in the top right.
2. Fill in the name, email, phone, and website. Upload or choose a logo. Set status and assign an owner.
3. Go to **Plan & Options** and select a subscription plan.
4. Go to **Modules** and enable the modules this company needs.
5. Click **Save**. A default site is created automatically.

Edit a Company

Click **Edit** on a row, update fields across any tab, and click **Save**.

Toggle Beta or Startup Package

Open **Edit** → **Plan & Options**. The options table shows current status, activation date, and expiry for each add-on. Click the toggle to enable or disable it. Platform admins only.

Grant Credits

Click **Grant Credits** on a row (or the **+** button in Plan & Options). Enter the number of AI credits to add and confirm.

Manage Members

Click **Members** on any company row.

- **Add existing user**: Search by name or email, choose a role, and click **Add**.
- **Invite by email**: Enter an email address, choose a role (Admin, Editor, or User), and click **Invite**.
- **Change role**: Use the dropdown next to a member's name.
- **Remove**: Click **×** on their row.
- **Pending invitations**: Appear below the member list. Click **Resend** for a fresh 7-day link, or **Cancel** to revoke.

Change Company Status

Click **Toggle Status** on a row to switch between Active and Suspended. For bulk updates, use the checkboxes and **Activate Selected** or **Suspend Selected**.

Delete a Company

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

Member Roles

Role	Description
Owner	Full control; cannot be removed
Admin	Can manage members and invitations

Role	Description
Editor	Can create and edit content
User	Standard access

Tips

- Storage bar turns orange above 75% and red above 90%.
- The company owner is automatically added as a member on creation.
- Invitations expire after 7 days — use **Resend** to issue a fresh link.
- Owner role can only be set by adding an existing user via the search field. It cannot be assigned via email invitation.
- Auto-join means invited users don't need to click their link — logging in with the invited email is enough.
- Toggle Status only switches between Active and Suspended. Use **Edit** to set Trial or Cancelled.
- The primary company (Air4.media LLC) cannot be deleted.
- Beta status, Startup Package, and Grant Credits are restricted to platform-level admins.

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

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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

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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.

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

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Documentation

Documentation

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

Key Features

- **Category Browser**: Articles are organized into eight sections — *Getting Started*, *Features & Tools*, *CRM & Contacts*, *Marketing*, *Media & Assets*, *Billing & Invoicing*, *AI & Automation*, and *Website & Design*.

- **Search**: Type any keyword into the search bar to instantly find relevant articles across all categories.
- **Table of Contents**: When reading an article, a sidebar automatically lists all the sections on that page so you can jump directly to what you need.
- **Article Navigation**: Previous and Next buttons at the bottom of each article let you step through the documentation in order.
- **PDF Downloads**: Download any individual article as a PDF, or grab the complete documentation set as a single PDF with a table of contents.
- **Direct Links**: Every article has a unique URL you can bookmark or share — no login needed.

How to Use

1. Open the Documentation page — no sign-in needed.
2. Browse articles by category on the main page.
3. Click any article title to open it.
4. Inside an article, use the **On this page** sidebar to jump to a specific section.
5. To find something specific, type a keyword into the **Search documentation** bar on the main page.
6. To save an article for offline reading, click **Download PDF** inside the article.
7. To download the full documentation library, click **Download PDF** on the main documentation page.

Tips

- Use the search bar to quickly locate answers without browsing manually.
- The full PDF download includes a table of contents — useful for printing or sharing with your team.
- Share a direct link to any article by copying its URL — recipients don't need an account to read it.
- Use the Previous / Next links at the bottom of articles to read through a category in sequence.

Domain Manager

Domain Manager

Manage your entire domain portfolio in one place. ACME Creative Agency's domains — whether registered through GoDaddy or managed via Cloudflare — appear in a single dashboard with live stats, DNS editing, and direct links to each registrar.

Key Features

- **Domain Overview**: Live stats show total domains, count per provider, and how many expire within 90 days
- **DNS Management**: Add, edit, or delete DNS records (A, AAAA, CNAME, MX, TXT, NS, SRV, CAA) without logging into GoDaddy or Cloudflare separately
- **Quick DNS Templates**: Apply pre-built record sets — Hosting, Email, Verification — to any domain in one click
- **Domain Search & Purchase**: Check availability and buy new domains through GoDaddy without leaving the platform
- **Site Linking**: Associate any domain with one of your Airmail sites for easy reference
- **Dual Provider**: Works with both GoDaddy-registered domains and Cloudflare-managed zones

How to Use

Sync Your Domains

Click **Sync Domains** to pull all domains from your connected providers. The stats row updates automatically — domains expiring within 30 days appear red, within 90 days yellow.

Manage a Domain

1. In the **Domains** tab, filter by registrar, DNS provider, or status to find the domain
2. Click **Edit** to open the details panel — link it to an Airmail site or add notes
3. Registrar info, expiry date, auto-renew status, and nameservers are read-only, pulled live from the provider
4. Click **Save** to apply changes, or the **Open in Registrar** icon to jump directly to GoDaddy or Cloudflare
5. Click **Remove** to take a domain off the list — this does not affect the registrar

Manage DNS Records

1. Click the **DNS Manager** tab and select a domain from the dropdown
2. Records load automatically with a last-synced timestamp
3. Click **Add Record** — choose the type, name, content, and TTL; for Cloudflare A/AAAA/CNAME records, toggle the proxy switch
4. Click the edit or delete icon on any existing record, or **Refresh** to pull the latest from the provider

Apply a DNS Template

1. In the **DNS Manager** tab, select a domain
2. Template buttons appear below the dropdown (Hosting, Email, Verification, and any custom sets)
3. Click a template — its records are added immediately without removing existing ones

Search and Buy a Domain

1. Click **Domain Search**, type a name, choose a TLD (.com, .net, .org, .io, .co, .ai, .dev, .app, etc.), and click **Check**
2. If available, the price appears — click **Purchase** to proceed
3. If taken, suggested alternatives appear below — click **Check** on any to evaluate it
4. Fill in registrant details or click **Load Saved**, pick a registration period (1–5 years), accept the agreements, and confirm

Connect Your Providers

1. Click the **Settings** tab
2. Enter your GoDaddy API Key and Secret (optional: reseller keys for purchases), choose Production or OTE/Test, then click **Test Connection**
3. Enter your Cloudflare API Token (needs "Edit zone DNS" permission), then click **Test Connection**
4. Click **Save Settings** — both providers are now active for syncing and DNS edits

Tips

- Click the **DNS Records** icon on any domain row to jump straight to its records in DNS Manager with that domain pre-selected
- Cloudflare's proxy toggle (orange cloud) routes traffic through Cloudflare's network — use

DNS-only mode when your server needs to be reached by its real IP address
- Use GoDaddy's OTE environment in Settings to test domain purchases without real charges
- Run **Sync Domains** after a purchase so the new domain appears in your list right away

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Downloads

Downloads

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

Email Management

Email Management

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

Key Features

- **Email Templates**: Build reusable templates for invoices, payment reminders, confirmations, and custom messages — dynamic placeholders like `{{client_name}}` fill in automatically at send time

- **Signature Library**: Create professional email signatures and attach them to any template
- **Compose & Send**: Write and send emails with CC, BCC, scheduling, priority, and optional tracking
- **Email Queue**: Monitor emails waiting to be delivered, with options to edit, retry, or cancel
- **Sent History**: Review all emails sent, with options to resend and view tracking data
- **Open & Click Tracking**: See when recipients open your emails or click links
- **Gmail Integration**: Connect your Gmail account via secure OAuth — sent emails appear in your Gmail Sent folder, no password stored
- **SMTP Settings**: Configure a custom mail server with built-in connection testing

How to Use

Managing Templates

1. Open **Email Management** — the Templates tab appears by default
2. Click **New Template** to create one, or click the edit icon on an existing template
3. Choose a type: New Invoice, Payment Reminder, Payment Confirmation, Overdue Notice, Welcome Email, or Custom
4. Enter a name, subject, and compose the body using the rich text editor
5. Optionally attach a signature, then set the template to **Active** so it appears in the Compose dropdown
6. Click **Save**

Use **Duplicate** to copy a template — the copy saves as inactive so you can edit before use. ACME Creative Agency, for example, keeps separate Payment Reminder templates for near-due and overdue invoices. Select multiple templates with the checkboxes to **Activate**, **Deactivate**, or **Delete** in bulk.

Composing an Email

1. Click **Compose Email** at the top of the page
2. Enter recipients in the **To** field; optionally add **CC** and **BCC**
3. Choose a saved template to pre-fill the subject and body, or write your own
4. Set **Priority** (Low, Normal, or High) and toggle **Tracking** to monitor opens and link clicks
5. To send later, check **Schedule for later** and pick a date and time
6. Click **Send** — the email joins the queue and is delivered automatically

Monitoring the Queue

Click the **Email Queue** tab to see pending, processing, failed, and scheduled emails. Edit a pending message, retry a failed one, or cancel delivery. Select multiple emails to retry, cancel, or delete in bulk.

Reviewing Sent Emails

Click the **Sent Emails** tab to view your full sending history. From here you can resend any message to the same recipients, check open and click tracking data, or filter by status and priority.

Email Settings

Click **Settings** to configure four areas:

- **SMTP**: Server credentials and encryption — click **Test Connection** to verify before saving
- **Gmail**: Connect your Google account via OAuth for better deliverability; no password is stored and emails appear in your Gmail Sent folder
- **Tracking**: Enable tracking by default and set a custom tracking domain
- **Default Settings**: From name, reply-to address, and default signature

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

Tips

- Only active templates appear in the Compose dropdown — keep drafts inactive until they're ready
- Use **Duplicate** to create variations of a template without starting from scratch
- Check the **Email Queue** after sending to confirm your message was accepted for delivery
- Tracking shows the first time a recipient opens your email — helpful for knowing when to follow up
- Gmail integration keeps your sent history in one place and improves inbox deliverability

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Email Templates

Email Templates

Create and manage reusable email templates for every stage of your client workflow — quotes, contracts, invoices, appointments, and more. ACME Creative Agency, for example, keeps ready-made templates for every client touchpoint, from a first quote to a final invoice reminder, so every message goes out polished and on-brand.

Key Features

- **Template Library**: All your standard emails in one place, organized by category and searchable by name or subject
- **Merge Variables**: Automatically personalize emails with contact names, project details, quote amounts, invoice numbers, and more — inserted with a single click
- **Live Preview**: See exactly how your email will look with realistic sample data filled in before ever using it
- **Categories**: Organize templates by type — Quotes, Contracts, Invoices, Appointments, Portal, and General
- **Duplicate**: Copy any template as a starting point — the editor opens immediately with the copy ready to edit
- **Default Templates**: Load 10 professionally written templates instantly to hit the ground running

How to Use

Creating a Template

1. Click **New Template** in the top right
2. Enter a name for the template (used internally — e.g. "Quote Follow-Up")
3. Choose a category and set the status to **Active** or **Inactive**
4. Write your subject line, optionally including merge variables
5. Write the email body in the main editor — HTML formatting is supported
6. Click any variable chip in the right panel to insert it at your cursor position
7. Click **Preview** to check how the email looks with sample data
8. Click **Save Template**

Using Variables

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

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

Click any chip to insert it at the current cursor position in the body.

Loading Default Templates

Click **Seed Default Templates** to instantly create 10 pre-built templates covering the most common CRM scenarios: quote sent, quote accepted, contract ready, invoice sent, payment received, appointment confirmation, appointment reminder, client portal welcome, follow-up, and thank you. Templates that already exist by name are skipped automatically, so it's safe to run more than once.

Managing Templates

Each row in the list has four actions:

- **Edit** — open the editor to modify the template
- **Duplicate** — create a copy and open it in the editor immediately
- **Preview** — view the rendered email with sample data substituted in
- **Delete** — permanently remove the template

Use the **Category** filter above the list to narrow results, or search by name or subject line.

Tips

- Use specific names so templates are easy to find — "Invoice Reminder – 7 Days" is clearer than just "Invoice"

- Always preview before using a new template to catch formatting issues or missing variables
- Set a template to **Inactive** to keep it saved without it appearing in active use — useful for seasonal or situational emails you don't need year-round
- Duplicate an existing template and tweak it rather than starting from scratch for similar emails

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Flying License — Startup Package

Flying License — Startup Package

The Flying License 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.

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.

Integrations

Integrations

Connect your account with external services — payments, calendars, video calls, messaging, and more — all managed from one place. Status cards at the top of the page give you an instant overview of what's connected and what needs attention.

Key Features

- **Status Overview**: Cards at the top show each integration's state at a glance — green for active, grey for not connected, orange for setup incomplete
- **Stripe Connect**: Accept online payments on invoices by linking your Stripe account —

supports both test and live mode
- **Client Portal**: Give clients at accounts like ACME Creative Agency a secure login to view projects, invoices, contracts, and send you messages
- **QuickBooks**: Sync invoices and customer records to QuickBooks Online automatically
- **Google Calendar**: Two-way appointment sync with Google Calendar; selecting "Google Meet" as the location auto-generates a Meet link
- **Zoom**: Auto-create Zoom meeting links when you book appointments with "Zoom" as the location type
- **Google Workspace**: Provision and manage team email accounts on your domain
- **SMS / Twilio**: Send text messages to contacts with built-in templates and a live character counter
- **Webhooks**: Trigger actions in tools like Zapier, Make, or Slack when events occur in your CRM

How to Use

Stripe Connect

1. Click the **Stripe** tab and click **Connect Stripe Account** — choose Test or Live mode
2. Complete onboarding through Stripe's secure flow (business details, bank account, verification)
3. Once active, your business name, charges status, and payout status are displayed
4. Use **Stripe Dashboard** to review payments, or **Disconnect** to unlink the account
5. If the status shows "Setup Incomplete," click the prompt to resume verification with Stripe

Client Portal

1. Click the **Client Portal** tab — stat cards show active portal accounts, users, recent logins, and unread messages
2. Toggle the switch next to an account (e.g. ACME Creative Agency) to enable or disable portal access
3. Click **Manage Contacts** to control which contacts at that account can log in, set their passwords, and copy the portal link

QuickBooks

1. Click the **QuickBooks** tab — configure API credentials in Settings first, then click **Connect QuickBooks**
2. Once connected, view synced accounts, pending items, failed records, and last sync time

3. Click **Sync All Invoices** to queue all unsynced invoices in one step

Google Calendar

1. Click the **Google Calendar** tab and click **Connect Google Calendar**
2. Sign in with your Google account — only Calendar read/write access is requested
3. Appointments sync both ways automatically; click **Sync Now** to force an immediate update
4. Choose "Google Meet" as the appointment location when booking to auto-generate a Meet link

Zoom

1. Click the **Zoom** tab and click **Connect Zoom**
2. Authorize access through Zoom's secure login
3. Once connected, selecting "Zoom" as the appointment location type auto-creates a meeting link

Google Workspace

1. Click the **Workspace** tab and click **Connect Google Workspace** (requires super admin access)
2. Click **Create User** to provision a new email account on your domain
3. View all team members and their status, and click **View Groups** to manage distribution lists

SMS / Twilio

1. Click the **SMS** tab and enter a phone number (e.g. +12125551234)
2. Choose a template — appointment reminders, invoice reminders, follow-ups — or write a custom message
3. The character counter shows your message length in real time (160-character limit per SMS)
4. Click **Send SMS** — sent messages and replies appear in the history below

Webhooks

Click **Go to Webhooks Manager** to create and manage inbound and outbound webhooks. Outbound webhooks fire automatically when events like lead created, quote accepted, invoice paid, or appointment booked occur.

Tips

- Stripe uses OAuth — your login credentials are never stored here
- If Stripe shows "Setup Incomplete," click the card or tab and follow the prompt to finish verification with Stripe
- Portal access can be toggled per account at any time — clients lose or gain access immediately
- Google Calendar sync runs continuously; use **Sync Now** to force an immediate update
- QuickBooks sync runs in the background, so large batches won't slow you down
- Webhooks connect your CRM with tools like Zapier, Make, Slack, or any service that accepts HTTP requests

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Investor Deck

Investor Deck

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

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
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

Invoicing

Invoicing

Create, send, and track professional invoices — from first draft to final payment — with online payment collection, full payment history, and your own branded invoice design.

Key Features

- **Invoice Creation**: Add line items, quantities, and rates; totals calculate in real time
- **Online Payments**: Accept credit cards via Stripe — clients pay directly from their invoice link; optionally pass the card processing fee to the client
- **Multiple Payment Methods**: Offer Stripe, ACH, Zelle, check, or wire transfer on any invoice
- **Public Invoice Link**: Every invoice gets a short, secure shareable link (inv.air4.link/...) — clients view and pay without logging in
- **Status Tracking**: Invoices move through Draft → Sent → Partially Paid → Paid automatically, or update manually
- **Payment History**: See all payments per invoice; edit manual entries or issue Stripe refunds directly
- **Partial Payments**: Record multiple payments — the balance updates automatically after each one
- **Template Editor**: Customize your invoice with your logo, brand colors, and footer text
- **QuickBooks Export**: Export selected invoices to QuickBooks in one click
- **PDF Download**: Download or print any invoice as a PDF
- **Dashboard Stats**: Total invoiced, outstanding balance, overdue count, and paid total at a glance — click any stat card to filter the list instantly

How to Use

Create an Invoice

1. Click **Create Invoice**
2. Select a client and set the issue and due dates
3. Add line items — description, quantity, and rate; the total calculates automatically
4. Choose which payment methods to offer (Stripe, ACH, Zelle, check, wire)
5. Click **Save** to store as a draft

Send an Invoice

1. Open an invoice and click **Send**
2. Add recipients — contacts auto-suggest as you type; use To, CC, and BCC fields as needed
3. Optionally type a personal note to include in the email
4. Click **Send Invoice** — your client receives an email with a "View & Pay Invoice" button; the invoice moves from Draft to Sent automatically

Record a Payment

1. Click **Record Payment** on any sent invoice
2. Enter the amount, payment method, and date; save
3. The balance updates automatically — status changes to Paid when settled in full

View Payments & Issue Refunds

1. Click **Payments** on any invoice to open the payment history
2. Edit manual payment entries or delete non-Stripe payments as needed
3. For Stripe payments, click **Refund**, choose full or partial refund, select a reason, and confirm

Customize Your Invoice Design

1. Click **Template Editor** in the toolbar
2. Upload your logo, set your brand colors, and fill in your company details
3. Add a footer note and save — all invoices update immediately

Tips

- Drafts are invisible to clients — finalize before sending

- Use **Copy Link** from any invoice row to share the payment link directly, without sending an email
- Click **Pay Now** in a row to open the client's payment page instantly for quick follow-up
- Select multiple invoices to batch-send emails, export to QuickBooks, or delete at once
- Use **Mark as Sent** or **Mark as Draft** from the row menu to adjust status manually
- The **Overdue** stat turns red when invoices are past due — click it to filter the list
- Only draft or cancelled invoices can be permanently deleted
- Connect your Stripe account in **Settings** to enable online card payments

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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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Log Manager

Log Manager

View and manage system activity logs across the platform. Monitor errors, security events, and page activity from one central location. This page is available to platform administrators only.

Key Features

- **Six Log Types**: Tracks Error, Info, Debug, Warning, Access, and Security events in separate color-coded files — red for errors, yellow for warnings, purple for access, teal for security

- **Live Log Viewer**: Click the eye icon next to any log type to load its entries into the viewer below
- **Adjustable View**: Choose to display the last 50, 100, 200, or 500 log lines using the dropdown at the top
- **Clear Logs**: Erase a single log file or clear all logs at once — both actions require confirmation before anything is deleted
- **Copy & Select**: Copy log content to clipboard or select all text for manual export
- **Page Logging Control**: Enable or disable activity logging for each page individually using the toggle switches in the Page Logging panel
- **Smart Toggle All**: The toggle button in the Page Logging header switches all pages on or off at once — if any pages are currently logging, it disables all; if none are active, it enables all

How to Use

Viewing a Log

1. Open **Log Manager** from the sidebar
2. The **Log Files** panel lists all six log types with their current file sizes
3. Click the **eye icon** next to any log type to load its entries into the Log Content viewer below
4. Use the **Last N lines** dropdown at the top to control how many entries are shown (default: 100)
5. Click **Refresh** to reload the latest data at any time

Copying Log Content

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

Clearing Logs

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

Controlling Page Logging

1. The **Page Logging** panel lists every active page in the platform

2. Flip the toggle next to any page to enable or disable logging for that page
3. Use the **toggle button** in the Page Logging header to switch all pages on or off at once

Tips

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

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Login & Account Access

Login & Account Access

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

Key Features

- **Email & Password Login**: Sign in securely with your registered email and password.
- **Google Sign-In**: Log in instantly using your existing Google account — no separate password needed.
- **New Account Registration**: Create an account with your name, email, phone number, and a secure password.
- **Email Verification**: New accounts require email verification before you can log in. A 6-digit code is sent to your inbox (expires in 10 minutes).
- **Password Reset**: Forgot your password? Request a reset link sent directly to your email, valid for 60 minutes.
- **Multi-Factor Authentication (MFA)**: Accounts with MFA enabled are prompted to verify via email code, SMS, or Google Authenticator after signing in.
- **Spam Protection**: Registration and password reset forms are protected by Google reCAPTCHA to block automated abuse.

How to Use

Signing In

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

Signing In with Google

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

> **Note:** Google Sign-In is not available inside in-app browsers (Facebook, Instagram, Messenger, etc.). If you see a warning message, open this page in Safari or Chrome first.

Creating a New Account

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

Verifying Your Email

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

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

Resetting Your Password

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

Tips

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

Login Monitor

Login Monitor

Track every login attempt across the platform in real time. See who is logging in, when, from which IP address, and whether they succeeded or failed. This page is only available to platform administrators.

Key Features

- **Summary Stats**: Four cards at the top showing Total Attempts, Successful logins, Failed logins, and Success Rate — all calculated over the past 7 days.
- **Activity Chart**: A smooth area chart showing successful vs. failed logins over time, with green and red shading so trends are easy to spot at a glance.
- **7-Day / 30-Day Toggle**: Switch the chart between a 7-day and 30-day view to see recent activity or longer-term patterns.

- **Login Attempts Table**: A full, paginated log of every login attempt — showing Date/Time, Email, User name, Status, IP Address, and failure Reason.
- **Sortable Columns**: Click any column header to sort by date, email, status, IP address, or failure reason.
- **Search**: Filter the table by email address, IP address, or user name to quickly locate specific activity.

How to Use

1. Open **Login Monitor** from the sidebar.
2. Check the four stat cards at the top for a quick 7-day summary — Total Attempts, Successful, Failed, and Success Rate.
3. Review the **Recent Login Activity** chart to see trends. Click **7 Days** or **30 Days** to change the time window.
4. Scroll down to the **Login Attempts** table for the full record-by-record log.
5. Click any column header to sort the list. Use the search box to filter by email, IP address, or user name — for example, search `acme-creative.air4.media` to see all login activity from the ACME Creative Agency account.
6. Check the **Status** badge — a green **Success** badge means the login went through; a red **Failed** badge means it was rejected.
7. For failed attempts, read the **Reason** column to see why access was denied (e.g. wrong password, account not found).

Tips

- The **Success Rate** card is color-coded: green means above 80% (healthy), yellow means 60–80% (worth watching), and red means below 60% — which may indicate a brute-force attack or widespread credential issues. Investigate promptly if you see red.
- Sort by **IP Address** to spot a single source generating repeated failed attempts.
- Switch to the **30-day** chart to identify recurring patterns, such as spikes at specific times of day or week.
- The table is read-only — use it for monitoring and investigation, not account management.

Logout

Logout

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

Key Features

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

How to Use

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

Tips

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

Logs

Logs

The Logs page 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.

Menu Management

Menu Management

Control which pages appear in the navigation menus across your platform. Reorder items, show or hide pages, nest submenu entries, and organize sections — all changes take effect immediately without any configuration.

Key Features

- **Drag-and-Drop Reordering**: Grab any menu item and drag it to a new position or into a different feature group — the order saves automatically. Valid drop zones highlight green as you drag; invalid zones dim red
- **Sidebar & Top Bar**: Switch between the sidebar menu and top bar menu using the buttons at the top of the page
- **Show/Hide Items**: Toggle any item on or off using the eye icon — hidden items appear faded with a strikethrough in the list
- **Edit Item Details**: Change a menu item's title, icon, location, platform, feature group, and submenu placement from a clean edit panel
- **Submenu Support**: Assign a parent item to nest pages as submenu entries — child items appear indented beneath their parent in both the structure list and the live preview
- **Live Preview**: A real-time sidebar preview on the right updates as you make changes, showing exactly how the menu will look to users

- **Platform Sections**: Items are organized by platform (Air4 Pilot, Pilot, Portal) in collapsible sections — your expanded/collapsed state is saved between visits

How to Use

Reorder Menu Items

1. Open the **Menu Management** page
2. Find the item you want to move in the **Menu Structure** panel on the left
3. Click and drag it to a new position — green highlighting shows valid drop zones
4. Release to place it; the order saves automatically

Show or Hide a Menu Item

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

Edit a Menu Item

1. Click the **pencil icon** next to any item
2. Update the **Title** as needed
3. Click the icon button to browse and search available icons
4. Set the **Menu Location** — Sidebar, Top Bar, Footer, or None
5. Choose a **Parent Menu** to nest it as a submenu item under another entry
6. Adjust the **Platform Level** and **Feature Group** to control where it appears in the structure
7. Check or uncheck **Active** and **Show Divider After** as needed
8. Click **Save Changes**

Switch Between Menus

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

Tips

- **Dashboard** and **Menu Management** are protected — they cannot be hidden, moved, or deactivated

- Items with a badge like **"2 sub"** have submenu children — click the pencil icon to view or change their parent assignment
- Use the **Refresh** button to reload menu data and discard any unsaved drag-and-drop changes
- Setting **Menu Location** to **None** removes an item from all menus without deleting it from the system
- Collapse platform sections by clicking their header to keep the list tidy — the state is remembered for your next visit

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Module Manager

Module Manager

The Module Manager gives platform administrators a central place to view, enable, and disable Pilot modules across all sites. Every module — from marketing tools to commerce extensions — is displayed as a card showing its status and usage at a glance.

Key Features

- **Module Cards**: Each module appears as a card with its name, color-coded category badge, description, version number, and how many sites currently have it active.
- **Enable / Disable Toggle**: A toggle switch in the top-right corner of each card turns a module on or off globally with a single click. Disabled cards appear slightly faded with a gray border so you can spot them at a glance.
- **Installation Indicator**: A green checkmark in the card footer means the module's files are properly installed. A yellow warning icon means the module folder is missing — the toggle may show it as enabled but it won't function.
- **Category Filter**: Use the **Category** dropdown above the grid to show only Marketing, Engagement, Content, Commerce, or Collaboration modules.
- **Search**: Type in the search bar to filter by name, description, or category — results update instantly.
- **Sort Controls**: Click any column header to sort by Module name, Category, Active Sites, or Status.
- **Module Details**: Click the **Details** button on any card to open a popup with the full module breakdown, including which sites have it activated, each site's URL, activation status, and the

date it was turned on.

How to Use

Enabling or Disabling a Module

1. Find the module using the search bar or Category filter.
2. Click the toggle switch in the top-right corner of the card.
3. A confirmation message appears and the list refreshes to show the updated state.

> Disabling a module affects it globally — it becomes unavailable across all sites until re-enabled.

Viewing Module Details

1. Click the **Details** button on any module card.
2. The popup shows version, category, enabled/disabled status, and whether the module files are installed on the server.
3. A table lists every site using this module — with each site's name, URL, activation status, and the date it was activated.

Filtering and Searching

1. Type in the search bar to match modules by name, description, or category.
2. Use the **Category** dropdown to narrow the list to a specific group.
3. Select **All Categories** to clear the filter.

Tips

- The **Sites** count on each card shows how many sites currently have that module active — check this before disabling to understand the impact.
- A yellow warning icon means the module's files are missing from the server, even if the toggle shows it as enabled. Contact your platform administrator to reinstall the module.
- The list defaults to alphabetical order. Use the sort controls to reorder by Active Sites or Status to quickly find the most-used or disabled modules.

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

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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.

Onboarding

Onboarding

The onboarding wizard gets your business set up on Air4.media in about 2 minutes. A 3-step progress bar guides you through Your Business, Pick a Plan, and Get Started — then you land on your dashboard ready to go.

Key Features

- **3-step wizard**: Progress bar keeps you oriented — Your Business, Pick a Plan, and Get Started

- **Live subdomain preview**: As you type your business name, your free site address (e.g. `acme-creative.air4.media`) appears in real time
- **Industry selection**: Choose from Photo Booth, Photography, Videography, Events & Entertainment, Creative Agency, Real Estate, E-Commerce, Consulting, and more
- **Brand setup**: Expand "Brand your business" to upload a logo (PNG, JPG, SVG, WebP — drag-and-drop or click, max 5 MB) and pick from 8 brand color presets or a custom color picker
- **All features included**: Every plan comes with CRM, email marketing, AI tools, media, website builder, and more — plans differ by scale (users, storage, contacts, emails, AI credits per month)
- **Intro offer**: New accounts get 50% off for the first 2 months on qualifying paid plans
- **Beta Program**: New users are offered free beta access on step 3 — full platform access, no credit card required
- **Secure payment**: If you choose a paid plan, card details go through Stripe and are never stored on Air4.media servers
- **Startup Package**: A one-time add-on (shown on the plan step) where the Air4.media team sets everything up for you
- **Instant activation**: Your account, starter website, and CRM pipeline are live the moment setup completes

How to Use

1. Enter your business name — your free subdomain appears as you type (e.g. `acme-creative.air4.media`)
2. Optionally select your industry and enter your existing website URL
3. Expand **Brand your business** to upload a logo and choose a brand color
4. Click **Continue** to reach plan selection
5. Toggle **Monthly** or **Annual** billing (annual saves ~17%), then click a plan card to select it
6. Optionally, click **Learn More** on the Startup Package if you'd like the team to handle your full setup
7. Click **Continue** — new users see a **Beta Program** offer: click **Join the Beta — It's Free** for full access with no card, or **No thanks, I'll subscribe** to proceed with payment
8. On the payment screen, review the order summary (plan price, any intro discount, signup AI credits), enter your card details, check the authorization box, and click **Launch My Business**
9. Your account is created instantly — a confirmation screen shows your company name, site URL, and plan, then click **Go to Dashboard**

Tips

- Annual billing saves approximately 17% compared to paying month to month
- The 50% intro offer appears automatically on qualifying plans in the order summary
- Beta access gives you the full platform for free — no credit card required
- Your CRM pipeline comes pre-configured with 6 stages: New Lead, Contacted, Qualified, Proposed, Won, and Lost
- Logo and brand color can be updated anytime from Company Settings
- You can add more companies to your account by running the wizard again from your dashboard
- A welcome email with your account summary is sent automatically after setup completes

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Page Management

Page Management

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

Key Features

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

How to Use

Creating a New Page

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

Editing a Page

1. Find the page in the list and click **Edit**.
2. The edit form is divided into three sections:
    - **Basic Information**: Edit the page name. The path and template type are shown for reference and cannot be changed.
    - **Navigation Settings**: Update the **Menu Location** or **Icon**.
    - **Page Assets**: Add or remove view, handler, JavaScript, CSS, or support files associated with this page.
3. Click **Save Changes**.

Deactivating a Page

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

Searching and Sorting

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

Tips

- **Active vs. Inactive**: The Status column shows a green badge for active pages and a red badge for inactive ones. Inactive pages still appear in this list so you can reactivate them if needed.
- **Auto-generated paths**: When you type a page name in Step 1, the URL path and all asset file names are generated automatically — you rarely need to change them in Step 2.
- **CRUD pages and database tables**: The database table dropdown is populated from the live database, so only existing tables appear.
- **Support files**: Support Files track reference or backup files associated with a page but are not loaded when the page runs.

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.

Pilot Settings

Pilot Settings

Configure system-wide settings for your Pilot account, including AI integrations, API credentials, security options, and general platform preferences. For ACME Creative Agency, this is the central place to connect your AI tools and control how the platform behaves across your workspace.

Key Features

- **Organized by Category**: Settings are grouped into labeled sections — such as AI, General, and Security — so you can quickly find what you need without scrolling through everything at once.
- **AI Provider Setup**: Connect Claude, OpenAI, Gemini, or Ollama by entering your API key and selecting which model to use for ACME's AI-powered features.
- **Auto-Discover Models**: Fetch the latest available models from any AI provider with a single click — no need to look up model names manually.
- **Secure Credential Fields**: API keys are masked by default. Click the eye icon to reveal a value when you need to verify or update it.
- **Toggle Switches**: Enable or disable features instantly with simple on/off switches.
- **Security Settings**: Configure multi-factor authentication and other account security options to keep ACME's workspace protected.

How to Use

1. Navigate to **Pilot Settings** from the sidebar menu.
2. Settings appear in sections, each labeled by category (for example, "AI Settings" or "General Settings").
3. Update any field:
    - **Text fields**: Type directly into the field.
    - **Dropdowns**: Click to select from the available options.
    - **Switches**: Click the toggle to turn a feature on or off.
    - **Credential fields**: Enter your key; click the eye icon to show or hide the value.
4. To connect an AI provider (for example, setting up Claude for ACME's AI features):
    - Enter your API key in the key field.
    - Click **Discover Models** next to the model dropdown. The button will spin while it fetches the list.
    - Select your preferred model from the updated dropdown.
5. When all changes are made, click **Save Settings** at the bottom of the page.
6. A confirmation message appears at the top of the page and dismisses automatically after a few seconds.

Tips

- Enter your API key before clicking **Discover Models** — you'll see a warning if the key is missing. Ollama is the exception and does not require a key.
- If **Discover Models** fails, verify that your API key is correct and active in your provider's account dashboard.
- All changes are saved together when you click **Save Settings** — there is no auto-save, so make all your edits before saving.
- Each category section groups related settings together, making it easy to configure one integration without affecting others.

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

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Platform Dashboard

Platform Dashboard

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

Key Features

- **Live Status Line**: Just below the page title, a one-line summary shows the current state at a glance — for example, "12/12 services running • 8 companies • 24 users" — turning red if any service has errors.
- **Health Indicator Cards**: Six at-a-glance cards showing services running, total companies (with site count), total users, emails sent in the last 24 hours, revenue for the last 30 days, and total storage used across all companies. Alert badges appear directly on the cards when there are service errors, failed emails, or overdue invoices.
- **Services Status**: A live list of every background service with its current status (running, stopped, or error) and how long ago it last ran. A color-coded dot makes it easy to spot problems at a glance.
- **Companies Overview**: A scrollable list of all companies on the platform — for example, ACME Creative Agency appears here with its subscription plan, user count, site count, and storage usage. Sorted by most recently created.
- **Revenue Panel**: A summary of paid invoice revenue for the last 30 days and last 7 days, the number of invoices paid, and any overdue invoices with their total outstanding amount.
- **Email System**: Delivery statistics for outgoing emails — sent and failed counts for the last 24 hours and 7 days, plus how many are currently queued or actively sending right now.
- **AirChat**: A snapshot of customer chat conversations — active sessions, escalated chats, new conversations today, and totals for the week and all time.
- **Recent Logins**: The 10 most recent login attempts across all users, showing name, IP address, time, and whether the login succeeded or failed.

How to Use

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

Tips

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

Portal Design

Portal Design

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

Key Features

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

How to Use

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

Tips

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

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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.

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

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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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Query Browser

Query Browser

The Query Browser gives platform administrators a complete view of every AI interaction across the account — including the exact prompt sent and the full response returned by Claude or ChatGPT.

Key Features

- **Query List**: Scrollable list of all AI interactions, newest first, showing up to 50 at a time
- **Filter by User**: Narrow results to queries from a specific team member — for example, see only queries submitted by a particular ACME Creative Agency user
- **Filter by AI**: Show only Claude queries, only ChatGPT queries, or all at once
- **Search**: Type any keyword to search across prompt text, response content, and AI type — results refresh automatically
- **Query Details**: Click any entry to view the full prompt, the complete AI response, who sent it, and when
- **Template Tracking**: If a query was sent using a saved AI template, the template name and category appear in both the list and the detail view
- **Version Badge**: Each query shows which version of the template was active when it was sent
- **Backup File Viewer**: When a query was sent with a backup file attached, a **View** button lets you inspect that file in a popup
- **Extracted Files**: Files referenced inside an AI response are automatically detected and listed as clickable buttons in the detail view
- **Save to Database**: From the file viewer, save any extracted file for future reference — or update it if the content changes
- **Copy to Clipboard**: Copy the full query or full response in one click; also copy file content directly from the viewer popup

How to Use

1. Open **Query Browser** from the sidebar menu
2. The left panel loads the 50 most recent AI queries automatically
3. Use the **User** dropdown to filter by a specific team member, or the **All APIs** dropdown to focus on Claude or ChatGPT
4. Type in the search box to filter by keyword — the list updates as you type
5. Click any entry to open its full details in the right panel

6. Scroll through the prompt and response; use **Copy Query** or **Copy Response** to copy either to your clipboard
7. If an AI template was used, its name appears under **Used Template** — hover over it to see the template category
8. If a backup file was attached to the query, click **View** under **Backup File** to inspect its contents in a popup
9. If the response references files, they appear under **Extracted Files** — click any file button to open the content viewer
10. In the file viewer, click **Save to Database** to store the file, **Update in Database** to overwrite a previously saved version, or **Copy Content** to copy it to your clipboard
11. Click **Refresh** at any time to reload the list with the latest queries

Tips

- Saved files show a green **Saved** badge on their button in the Extracted Files list — at a glance you can tell what's already been stored
- If a saved file differs from the currently extracted version, a **View Saved Version** button appears in the file viewer — click it to toggle between the two versions and compare them
- Combining the User filter with a keyword search is the fastest way to track down a specific interaction — for example, filter to one user and search "invoice" to find all invoice-related AI work at ACME
- The version number badge on each list entry tells you which iteration of the template was used, making it easy to trace results back to a specific template revision

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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

Invoicing (Admin):

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

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

Reports

Reports

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

Key Features

- **Time Period Filter**: Switch between 7 Days, 30 Days, 90 Days, or 1 Year to focus on the timeframe that matters (applies to Overview, Revenue, Activities, and Conversion tabs)
- **Overview**: Eight KPI cards at a glance — revenue collected, outstanding invoices, new accounts, new projects, win rate, average deal size, activities logged, and won/lost counts — plus a period summary table and a win rate circle showing your project outcome ratio
- **Revenue**: Monthly revenue bar chart with horizontal breakdowns by top 10 accounts and by project type
- **Pipeline**: A live snapshot of all active projects by stage (Proposed, Contracted, Planning, In Production, On Hold) and project type, an upcoming 90-day start timeline, and an aging table that flags stale proposals
- **Activities**: Daily activity bar chart, task completion rate, activity breakdown by type, and most-active accounts in the selected period
- **Conversion**: Quote funnel (Total → Accepted → Declined), contract signing rate, average days to close, and a 12-month conversion trend table

How to Use

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

Tips

- Start with **Overview** for a quick health check — the win rate circle gives you an instant read on how many projects ended in a win vs. a loss
- The **Pipeline** tab is always a live view of your current active work; the time period filter does not apply here
- In the **Pipeline** aging table, any proposal or planning-stage project that hasn't moved in more than 30 days is flagged in red — your cue to follow up
- The **Conversion** trend table color-codes each month's quote acceptance rate: green (50%+), yellow (25–49%), or red (under 25%), so improving or declining close rates are easy to spot at a glance
- Use **Activities** to identify quiet periods and confirm that key accounts are getting consistent attention
- Revenue breakdowns by account and project type help you identify your most profitable client segments

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Resources

Resources

Manage all the people, equipment, and venues your business relies on — in one place. Resources can be assigned to projects and appointments, with rates and availability tracked throughout. For ACME Creative Agency, this means keeping photographers, video gear, and studio spaces all under one roof.

Key Features

- **Resource Types**: Organize resources as People (Employee, Subcontractor, Vendor, White Label), Equipment (Equipment, Vehicle), or Venue — each with its own icon and color badge in the list
- **At-a-Glance Stats**: Four dashboard cards show counts for People, Equipment, Venues, and Active resources at the top of the page
- **Quick Filters**: Switch between All, People, Equipment, and Venues with one click using the toolbar buttons
- **Rate Tracking**: Store hourly and day rates per resource in USD, EUR, GBP, or CAD — displayed together in the Rate column (e.g. $75/hr · $500/day)
- **Assignment Count**: See at a glance how many projects or appointments each resource is linked to
- **Calendar Colors**: Pick from eight colors per resource for easy identification when scheduling
- **Equipment Details**: Track serial number, purchase date, condition, and quantity available for gear and vehicles — in a dedicated Equipment tab
- **Status Management**: Mark resources as Active, Inactive, or On Leave

How to Use

Add a Resource

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

Find a Resource

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

Edit or Delete

- Click **Edit** on any row to update a resource's details
- Click **Delete** on a row to remove a single resource
- Check multiple rows and use **Delete Selected** for bulk removal

Tips

- Link resources to your existing Contacts and Accounts to keep your CRM connected — for example, link a subcontractor to their contact record in ACME's contact list
- The **Assignments** column shows how often a resource is booked — useful for spotting overloaded team members or equipment
- Use **On Leave** instead of deleting people who are temporarily unavailable, so their history stays intact
- Use the **Retired** condition for equipment no longer in service but worth keeping on record
- Assign distinct calendar colors so resources stand out when scheduling projects and appointments

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Safeboxes

Safeboxes

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

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Service Manager

Service Manager

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

Key Features

- **Service List**: Every service is listed with its live status (Running, Stopped, Error), current CPU and memory usage, and uptime at a glance.
- **Start / Stop / Restart**: Control any service with one click. Buttons appear contextually — Stop and Restart only show for running services, Start only for stopped ones.
- **Batch Actions**: Select multiple services and start, stop, restart, or delete them all at once. A progress bar tracks the operation.
- **Real-Time Monitoring**: Open the Monitor panel for any service to see live CPU, memory, thread count, I/O activity, and a live log stream with auto-scroll.
- **Built-In Script Editor**: Each service can run a script. Write a new one or load an existing file directly in the built-in code editor.
- **Cron Scheduling**: Automate any service with a schedule. Choose from presets (Hourly, Daily, Weekly, etc.) or enter a custom expression. A plain-English preview shows exactly when the service will run.
- **Auto-Start on Boot**: Mark a service to start automatically whenever the server restarts.
- **Auto-Stop Timer**: Set a time limit (in minutes) after which a service stops itself. Set to 0 to run indefinitely.
- **Log Files**: Browse, view, clear, or delete log files for all services from the Log Files panel.
- **Crash Detection**: The system checks for crashed services every minute and can alert or restart them automatically.

How to Use

Create a Service

1. Click **New Service** in the top-right area.
2. Enter a name and description on the **Details** tab.
3. Optionally check **Auto-start on system boot** and set an **Auto-stop** timer.
4. Switch to the **Script** tab to write a new script or load an existing one.
5. Click **Save Service**.

Start, Stop, or Restart a Service

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

Monitor a Service in Real Time

1. Click **Monitor** on any service row.
2. A panel opens with live status, resource usage, and a scrolling log output.

Schedule a Service

1. Click **Schedule** in the service row (or open the service and go to the **Schedule** tab).
2. Pick a preset (e.g., **Daily**) or fill in the custom cron fields.
3. The preview shows a plain-English explanation and the next run time.
4. Click **Save Configuration**.

View and Manage All Schedules

- Click **Scheduled Services** in the toolbar to see every cron job across all services, with options to activate or edit each one.

Manage Log Files

- Click **Log Files** in the toolbar to browse all service logs. View, clear, or delete individual files.

System Tools

Click the **System Tools** menu for platform-level diagnostics:

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

Tips

- Use the **Status** and **Auto Start** filters at the top of the list to quickly narrow down services.

- Search by name or description to find a specific service instantly.
- The Monitor panel updates live — leave it open to watch a service during a critical operation.
- Always save a service before configuring its schedule; the Schedule tab requires a saved service ID.
- Set **Auto-stop** to a few minutes for short-lived tasks so they don't run indefinitely if something goes wrong.

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

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Site Builder

Site Builder is your visual website builder inside Pilot. Create, edit, and publish websites for ACME Creative Agency — no coding required. Your site at acme-creative.air4.media is built and managed entirely from here.

Key Features

- **Simple Mode (Vibe Coding)**: Chat with AI in plain language — "Add a testimonials section" or "Change the hero headline" — and see your site update live in the preview panel
- **Advanced Mode**: Five specialized tabs — Explorer (page grid), Chart (visual sitemap), Design, Modules, and Menus — for full control over every detail
- **Draft branches & Go Live**: Edit freely in a draft branch without affecting your live site; click **Go Live** to publish everything at once
- **Version history**: Save a snapshot of your site structure or design at any point; restore any previous version to roll back changes
- **AI site generation**: Enter your business details, upload brand assets, add up to 3 reference websites for design inspiration, and choose Claude or GPT — AI generates design variations you preview before committing
- **Design Editor**: Set brand colors, fonts, logos, social links, and custom CSS — all pages inherit your settings automatically
- **Modules**: Toggle on AirBlog, AirShop, AirPortal (client portal), AirChat, AirBook, AirForms, and more — each gets its own URL path and theme
- **Menus Editor**: Build named menus with custom styling, add pages or external links, drag to

reorder, and assign to Top Bar, Sidebar, or Footer locations

How to Use

1. Open Site Builder — you land in **Simple Mode** with an AI chat panel and live preview side by side
2. Type what you want: "Add a services section with three columns" — the AI edits the page and shows a live preview instantly (2 credits per page edit)
3. To build a full site with AI, click **Build with AI**: enter company name, industry, brand colors, and services; optionally upload a logo or paste up to 3 reference website URLs; choose Claude or GPT; click **Generate Site** (12 credits)
4. Browse the generated design previews — click **New Design** for a fresh variation or **Variation** for a subtle alternative; when satisfied, click **Build My Site** (15 credits)
5. Switch to **Advanced Mode** to fine-tune: open **Design** to set colors, fonts, and logos; **Modules** to enable features; **Menus** to configure navigation
6. In Explorer or Chart, right-click any page to edit, duplicate, add a child page, preview, or archive it; drag pages in Chart view to reorder the site hierarchy
7. Use **More Actions** to scaffold a starter structure, apply a template, import from a live URL, or browse version history
8. Click **Go Live** to push your entire draft live; use the **Compare to Live** button in the branch banner to review what will change first

Tips

- Use Simple Mode for quick AI edits, then switch to Advanced Mode for precise control over layout and structure
- Set your Design tokens first — one change to colors or fonts updates every page on the site
- Save your finished design as a template to reuse on future client sites
- The **Compare to Live** banner lets you diff your draft against the current live site before promoting — great for catching unintended changes
- After enabling or disabling modules, click **Apply Rewrite Rules** to activate updated URL routing instantly
- AirPortal lets ACME Creative Agency's clients log in to view invoices, projects, contracts, and documents in one place; configure hosting mode (Starter, Business, or Enterprise) in the Modules tab
- Your AI credit balance is shown before every AI action; designing a new site costs 12 credits, building it costs 15 more (27 total)

Site Editor

Site Editor

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

Key Features

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

How to Use

Browsing Files

1. The left panel shows the file tree for the current directory

2. Click any folder to expand it and see its contents
3. Click any file to open it in the editor
4. Use the breadcrumb trail at the top to navigate back up

Editing Files

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

Managing Files

- Click the **file icon** in the explorer header to create a new file
- Click the **folder+ icon** to create a new folder
- Click the **upload icon** to upload files — ZIP archives are extracted automatically
- Each file and folder row shows quick-action buttons on hover: preview, info, and download
- To rename or move an item, use the action buttons — moving opens a folder browser to pick the destination

Version History

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

Bookmarks

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

Environments

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

AI Assistant

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

Tips

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

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Site Management

Site Management

View and manage all sites on your platform — including web pages, digital asset libraries, and externally hosted DAM sites. For ACME Creative Agency, this is where you oversee every client-facing site from a single dashboard.

Key Features

- **Site List**: See all your sites at a glance — URL, type, status, SSL state, FTP domain, AirMail status, owner, storage usage, and creation date
- **Search & Filter**: Find sites by name or URL, and narrow down by type (Page, DAM, External DAM) or status (Active, Suspended, Pending)
- **Add New Site**: Create a site by providing a name, URL, type, and assigning an owner
- **Edit Site Details**: Update a site's name, URL, type, status, and owner at any time
- **DNS Verification**: Confirm your domain is correctly pointed to the server before enabling SSL

- **SSL Certificates**: Provision, renew, or remove SSL certificates once DNS is verified — with an auto-renew option to keep things current
- **DAM Configuration**: Connect a Digital Asset Management site to its FTP domain and database
- **Toggle Status**: Switch any site between Active and Suspended with one click
- **Batch Actions**: Select multiple sites to activate, suspend, or delete them all at once
- **Site Editor**: Jump directly into the visual editor for any active, non-external site

How to Use

Add a New Site

1. Click **Add New Site** in the top-right corner
2. Enter the site name, URL (domain only, e.g. `acme-creative.com`), type, and owner
3. Set the initial status and click **Save Changes**

Set Up DNS & SSL

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

Configure a DAM Site

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

Manage Status & Delete

- Click **Toggle Status** on any site row to switch between Active and Suspended
- A site must be **Suspended** before it can be deleted

Batch Operations

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

Tips

- Sites of type **DAM V7 (External)** are tracked for reference only — use **Open External** to visit them directly
- The **Site Editor** button only appears for active, non-external sites
- DNS propagation can take up to 48 hours — if **Check DNS** fails, wait and try again
- Storage usage is shown per site in the list, making it easy to spot heavy consumers
- Module configuration for DAM sites is managed separately in **Site Builder → Modules**

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

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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

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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.

System Settings

System Settings

System Settings is the platform maintenance hub for administrators. From here you can apply database updates and run one-time system migrations — all without any technical know-how required.

Key Features

- **Update Database**: Applies any pending platform updates in one click. If updates are available, a results panel pops up listing each item colour-coded green (success), yellow (skipped), or red (error). If everything is already current, a brief confirmation banner appears

instead.
- **Optimize Tables**: Reclaims unused space and tidies database tables to keep things running smoothly.
- **Repair Tables**: Checks and fixes any corrupted table data.
- **Clear System Cache**: Wipes the platform's internal cache so fresh data is loaded on the next request.
- **Clear Template Cache**: Clears any cached page templates, useful after layout or branding changes.
- **Email System Migration**: A one-time utility to migrate legacy email template files to the current email management system. A confirmation prompt appears before anything runs.

How to Use

Running a database update

1. Go to **System Settings** from the admin sidebar.
2. Under **System Maintenance → Database**, click **Update Database**.
3. The button shows a spinning indicator while the update runs.
4. When complete, one of two things happens:
   - If updates were applied, an **Operation Results** popup lists each item with its status — green for success, yellow for already up to date (skipped), red for error.
   - If the system was already current, a brief green banner appears at the top of the page and auto-dismisses after a few seconds.
5. Click **Close** to dismiss the results popup.

Running the email migration (one-time)

1. Under **Email System Migration**, click **Rename Email Templates → Email Management**.
2. A confirmation prompt asks you to verify before proceeding — click **Confirm**.
3. A results popup shows which files were renamed, skipped, or encountered an error.

Tips

- Run **Update Database** first whenever you notice new features aren't behaving as expected — a pending update is often the cause.
- Already-applied updates show as "skipped" in the results, so re-running is safe and won't undo anything.
- The email migration only needs to run once. If all items show "skipped", the migration is

already complete.
- Success and error banners dismiss automatically after a few seconds — no need to manually close them.

Template Management

Template Management

Create and manage reusable content templates used across the platform for AI processing, code analysis, and system operations. This page is accessible to platform administrators only.

Key Features

- **Template Library**: Browse all templates in a sortable list showing name, category, default status, and last updated date
- **Two Template Types**: Switch between Query Templates and Page Templates using the dropdown at the top of the page
- **Four Categories**: Organize templates into AI Processing, Code Analysis, System, or General
- **Default Templates**: Mark a template as the default for its category — it will be automatically selected whenever that category is needed elsewhere on the platform
- **Full Content Editor**: Write or paste multi-line template content directly in the editor when creating or editing
- **Add, Edit, Delete**: Create new templates from scratch, update existing ones, or remove templates no longer needed

How to Use

Browse Templates

1. Open **Template Management** from the admin menu
2. Use the **Query Templates / Page Templates** dropdown to switch between template types
3. Click any column header — Name, Category, Default, or Last Updated — to sort the list

Add a New Template

1. Click **Add New Template** in the top-right corner
2. Enter a descriptive **Name** for the template
3. Select the appropriate **Category** (AI Processing, Code Analysis, System, or General)
4. Type or paste the template **Content** into the editor
5. Check **Set as Default Template for this Category** if this should be the automatic default
6. Click **Save Template**

Edit a Template

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

Delete a Template

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

Tips

- Templates marked as default show a green **Yes** badge in the list — easy to spot at a glance
- The list opens sorted by **Last Updated** (newest first), so recently changed templates appear at the top
- Use descriptive names to keep your library easy to navigate as it grows
- This page is visible only to platform-level administrators

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.

User Management

User Management

Create, edit, and manage all platform users. At ACME Creative Agency, this page shows every team member — designers, account managers, and admins — with their role, login status, and two-factor authentication at a glance.

Key Features

- **Company Drill-Down**: Uber admins open to a list of all companies — click any row (e.g. ACME Creative Agency) to view its users, then use **← Back** to return
- **User List**: Name, company, email, phone, category, level, status, and MFA indicators for every account
- **Search & Filter**: Search by name, email, or company — filter by category, level, or status
- **Add New User**: Create accounts with contact details, access settings, and MFA options (uber admins only)

- **Edit User**: Update any user's profile, permissions, status, and security settings
- **Toggle Status**: Activate or suspend individual accounts with one click
- **Batch Actions**: Activate, suspend, or delete multiple users at once
- **View As User**: See the platform exactly as another user does (uber admins only)
- **Role Templates**: Create and configure permission templates per page (uber admins only)
- **Per-company Permissions**: Assign different role templates to each of a user's companies individually

How to Use

Adding a User

1. Click **Add New User** in the top right (uber admins only)
2. Enter name and email (required); optionally add company, phone, and address — use **Search Address** for Google Places autocomplete
3. Set **Category**, **Level**, and **Status**
4. Enable MFA methods as needed: Email, SMS, or Google Authenticator
5. Click **Save Changes**

Editing a User

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

Changing Status and Deleting Users

- Click **Toggle Status** on a row to switch Active ↔ Suspended
- Use checkboxes and the batch menu to **Activate**, **Suspend**, or **Delete** multiple users at once
- You cannot change status or delete your own account

Viewing the Platform as Another User

Click **View As** on any row (uber admins only). The platform reloads as that user's view — useful for checking permissions or troubleshooting access. Return to your admin view from this page.

Managing Role Templates

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

User Categories & Levels

Categories control which modules a user can access: **Uber** (full platform), **DAM Client**, **CRM Client**, **Guest**.

Levels control what they can do: **Admin** (full control), **Editor** (create and edit), **User** (read and limited interaction).

Tips

- Use the **Status** filter to quickly find all suspended or new accounts
- The MFA column shows two-factor authentication status at a glance
- Assign different role templates per company for fine-grained, company-level access control
- Batch actions automatically skip your own account — you can't accidentally suspend or delete yourself
- Enabling Edit, Delete, or Export on a template page automatically enables View as well

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Webhooks

Webhooks

Connect your CRM to external apps and services by automating data exchange whenever key events happen in your account. ACME Creative Agency, for example, uses webhooks to notify their project tools the moment a client pays an invoice or a new lead comes in.

Key Features

- **Outbound Webhooks**: Automatically notify an external service (Zapier, Slack, or a custom app) when something happens in your CRM — a signed contract, a paid invoice, a new lead.
- **Inbound Webhooks**: Receive data from external services into your CRM using a unique URL you share with the other service.
- **12 Trigger Events**: Choose exactly which event fires the webhook — from Lead Created to Portal Message.
- **Custom Payloads**: Define what data gets sent using a flexible template with dynamic variables like contact name and email.
- **Trigger Filters**: Add optional conditions so a webhook only fires when specific criteria are met.
- **Test & Monitor**: Send a test payload at any time and track success and error counts per webhook.
- **Enable / Disable**: Toggle any webhook on or off without deleting it.
- **Dashboard Stats**: See at a glance how many webhooks are total, active, inbound, and outbound.

Trigger Events

Choose from 12 events: Lead Created, Form Submitted, Quote Accepted, Contract Signed, Invoice Paid, Invoice Sent, Appointment Booked, Status Changed, Tag Added, Payment Received, Project Completed, or Portal Message.

How to Use

Create an Outbound Webhook

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

Create an Inbound Webhook

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

Test a Webhook

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

Enable or Disable

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

Tips

- Use payload templates with `{{contact.name}}` and `{{contact.email}}` style variables to send dynamic, personalized data to external services.
- Error counts appear in red — click **Test** to re-verify a broken connection after fixing the endpoint.
- The **Last Fired** column shows exactly when each webhook last triggered, making it easy to spot stale or unused connections.
- Use the **Direction** and **Status** filters to quickly find a specific webhook in a long list.
- Select multiple webhooks and use **Delete Selected** to clean up in bulk.

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.

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