

The screenshot displays the Pilot by Air4 Media CRM interface. At the top, there's a dashboard with three key metrics: Total Revenue (\$38,900), Outstandings (\$18,900), and Overdue (0). Below this is a table of invoices with columns for Invoice #, Client, Issue Date, Due Date, Total, Balance Due, Status, Payment Options, and Actions. The table lists 11 invoices, mostly from 'X17 Agency' and 'Air4.media Website'. The status of the invoices varies, including 'paid', 'sent', and 'overdue'. The interface also includes a sidebar with navigation options like Dashboard, Site Builder, AirBlog, AirForms, AirGallery, AirCatalog, Airmail, CRM, AirChat, and Air4 Pilot. At the bottom, there's a notification that 'Claude is active in this tab group'.

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

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.