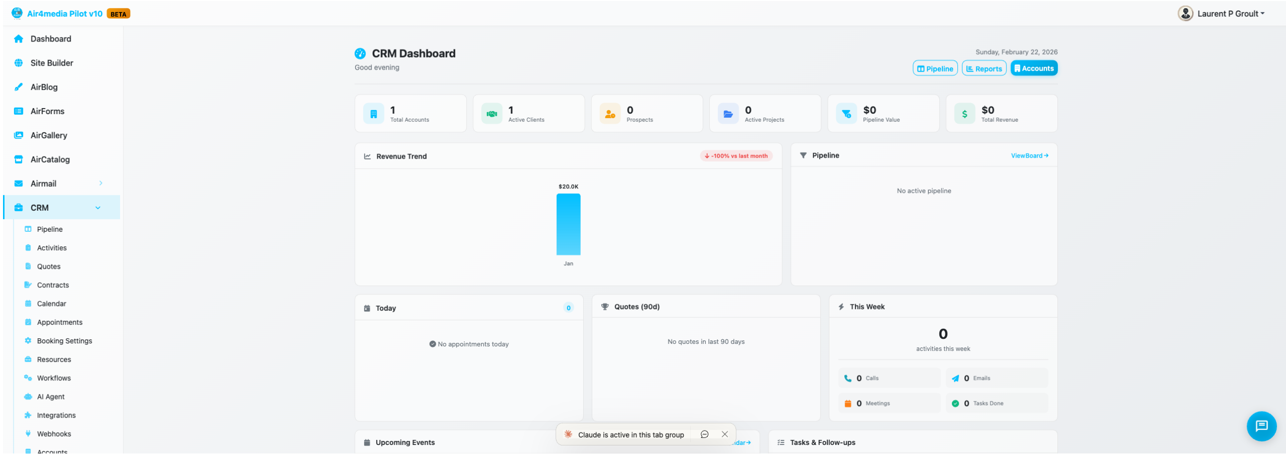

Pilot's CRM is a comprehensive customer relationship management system. It helps you manage contacts, track deals, create quotes and invoices, schedule appointments, and automate workflows.

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.