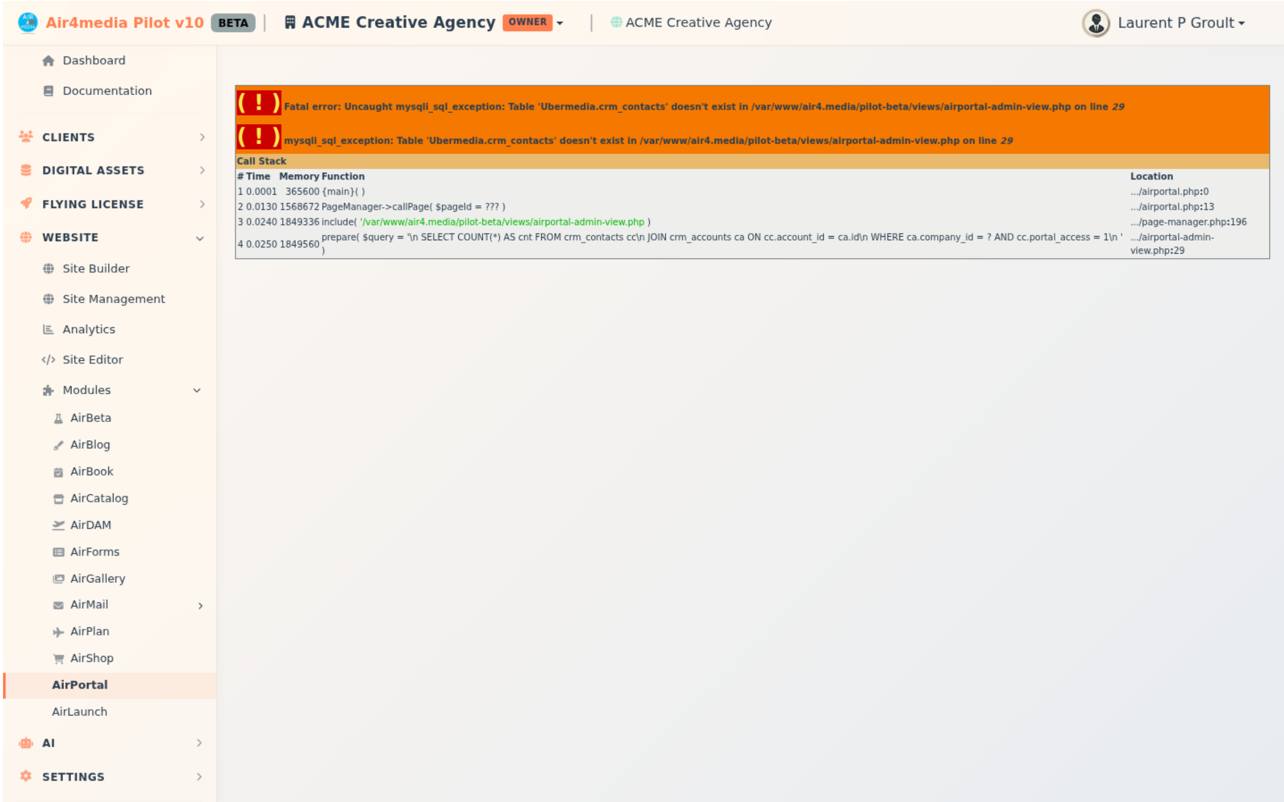

AirPortal

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.