



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.