Agency Assistant

Complete user guide for booking agents, finance teams, and artists

Version 3.12 · Updated 26 October 2026

Covers: Staff workspace · Booking automation · Itinerary collaboration · Artist portal

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CHAPTER 1

Getting started

Signing in

Agency Assistant uses secure sign-in managed by Clerk. You can sign in with your email address or a social provider (Google, etc.) depending on how your agency has configured access.

1. **Open the app URL** your agency has shared — you'll see the Agency Assistant sign-in page.
2. **Enter your email** and follow the verification steps. First-time users receive a verification email.
3. **You land on the Dashboard** (staff) or the Artist Portal home (artists). Your role determines which view you see.

> Artists sign in at the same URL as staff. The app automatically routes artist accounts to the Artist Portal and staff accounts to the agency workspace.

Finding your way around

The sidebar on the left is the main navigation on desktop. On mobile, a hamburger menu (☰) opens the same navigation as a drawer. The sidebar groups links by work area:

Group	Items	What it's for
—	Dashboard, Inbox	Overview, action items, and artist conversations
Work	Bookings, Calendar, Operations	Pipeline, schedule, itineraries, travel, and internal tasks
People	Artists, Contacts	Artist roster and CRM
Finance	Financial, Analytics	Contracts, invoices, statements, and reports

> **Quick financial access:** Open *Financial* for the Contracts, Invoices, and Statements tabs. Contracts and invoices also stay attached to their booking.

At the bottom of the sidebar you'll also find **Settings**, **User Guide**, and the **user account button** with theme, account, and sign-out controls.

Dark mode

Click your name / initials at the bottom of the sidebar → **Theme** → choose Light, Dark, or System. Your preference is saved per device.

Installing as an app (PWA)

Agency Assistant is a Progressive Web App. In Chrome or Edge, look for the install icon (⊕) in the address bar and click *Install*. On iOS, tap *Share → Add to Home Screen*. Once installed, it opens in its own window and works like a native app — ideal for mobile use on tour.

> Installing as an app on your phone is strongly recommended for artists — portal updates and message notifications work most reliably from the installed app.

Global search

The search bar at the top of every page searches across bookings, artists, contacts, invoices, and contracts at once. Press `⌘ K` (Mac) or `Ctrl K` (Windows) to open it from anywhere.

Notification preferences

Open **Settings → Notifications** to manage browser push notifications on the current device. Enable push alerts to get notified when, for example, a promoter signs a contract. Send yourself a test push to make sure it is working.

Use the bell to open an alert and mark it read, mark all alerts read, or clear read alerts. These actions affect only your own staff account and remain available to read-only staff. Cleared alerts stay cleared; genuinely new events can create new alerts. Failed saves show an error so you can try again.

CHAPTER 2

Dashboard & Needs attention

Dashboard

The dashboard gives you a live snapshot of everything that needs attention right now:

Upcoming shows

Your next few confirmed bookings in date order, with venue and artist at a glance.

Missing contracts

Confirmed bookings that do not yet have a contract attached.

Unsigned contracts

Sent contracts that still need a signature, including deadlines that are approaching.

Outstanding invoices

Sent invoices still awaiting payment, sorted by due date so overdue ones stand out.

Draft invoices

Prepared invoices that are ready for staff review and sending.

RSVP deadlines

Artist availability requests that are close to expiring without a response.

Needs attention

The **Needs attention** list keeps pending booking work in one compact place. There is no separate strip of deal, contract, and invoice counts above it, and the section disappears when there is nothing to do:

- **Draft invoices ready to send** — invoices created but not yet sent to the promoter.
- **Contracts awaiting signature** — sent contracts the promoter hasn't signed yet.
- **Unsigned contracts nearing expiry** — contracts with a deadline approaching.
- **RSVP requests outstanding** — availability checks sent to artists without a response yet.
- **Overdue invoices** — sent invoices past their due date.

Each row opens the relevant booking or document, without a separate review button. Document identity, artist or recipient details, status, and any amount remain readable. Completed items disappear automatically once resolved. Fold this list or the **At a glance** totals when you do not need them; your folded sections are remembered when you navigate away and return.

⚡ Resolving the underlying work removes it from Needs attention. Marking a notification read does not complete that work. Go to **Inbox** for artist conversations, announcements, and thread search.

CHAPTER 3

Bookings pipeline & automation

The pipeline view

Use **Board** for a pipeline grouped by stage or **List** for a compact booking list. Choose **Active**, **Completed**, or **Cancelled** beside search and **Filters**. Search and optional artist, stage and date filters narrow the current workset. Select a stage chip to filter either view; **All** clears the stage choice without clearing your other filters.

Expected until Paid is the booking-fee total before your configured Paid stage. It is not an invoice balance, cash received or an artist payout. On desktop, it sits beside the stage totals so more bookings fit on screen. If no Paid stage is configured or a fee cannot be converted, the summary explains why the amount is unavailable. Use Financial for invoice balances and payment records.

Pipeline stages

Lead → Offer → Confirmed → Completed Cancelled

The default booking lifecycle is **Lead → Offer → Confirmed → Completed**, with **Cancelled** kept as a separate outcome. Your workspace can rename, recolour, and reorder custom stages, and choose which enabled stages are visible in the Artist Portal. The protected **Confirmed**, **Completed**, and **Cancelled** stages cannot be disabled or removed; migrate bookings before retiring an unused custom stage. Financial statuses such as invoice sent or paid remain separate from completion tracking. Completed bookings stay searchable and remain available for reporting.

Creating a booking

Click **+ New Booking** at the top right. Fill in the title, select the artist(s), choose a date, venue, and promoter, then save. The booking starts in your first enabled pipeline stage. Venue and promoter fields show your recently-used entries at the top for quick re-selection.

> **Duplicating a booking:** if you can edit bookings, open the existing booking and choose **Duplicate**. The **Duplicate booking** dialog always includes core details and the artist roster. Choose whether to include **Travel & Accommodation** and **Attached files**, then create the copy. Duplication is not a row action in List or Board view, and it is not available in the artist portal. Review the new date, venue, promoter, stage, and financial details before continuing.

Booking detail

Click any booking card to open its detail page. The page is organised around these booking sections:

Tab	What it contains
Overview	Core details, deal terms, Deal Calculator, expenses, notes, next step, and custom fields.
Itinerary	The reviewed artist-facing document, Shared Checklist, publication controls, and staff-only Internal Tasks.
Contract	Draft, send, and track the booking contract. Use the *Create Contract* button to open the contract sheet without leaving the page.
Invoice	List of all invoices linked to this booking, with a *Create Invoice* button for inline creation.
Travel	Transport (flights, trains, buses, cars, and ferries) and a separate Accommodations section for stays.
Documents	Documents uploaded or linked to this booking (riders, settlement files, images, etc.).
Conversation	The artist thread for this show; available only in agency workspaces.

Overview puts the next step and booking summary first. Expand **Booking details** for the full editing form. **Additional information** contains custom fields and only appears when there are fields to show. There is no empty panel to fill in when no fields are available. This layout is shared by agency and independent-artist workspaces.

Use **View booking history** to open the **Booking history** dialog without leaving your work.

Performance times

Enter the performance start time and duration. The end time is calculated for you, including sets that finish after midnight. Changing the start time keeps the duration. Performance times use the workspace timezone, not your device timezone.

Booking status

The booking tabs show the current contract, invoice, and itinerary status alongside their names. Open the relevant tab to review the document or take the next action. There is no separate navigation bar to manage.

Next-step callout

On the Overview tab, the next-step callout shows the next required action in the booking workflow. Start a workflow if the booking is not yet tracked, then follow the review, signing, invoice, and itinerary steps. Documents still require explicit financial review and approval before sending.

Booking automation

Booking automation is a tracked coordination workflow, not unattended document sending. Admins configure workflows in **Settings → Booking workflow**; pipeline-stage configuration remains in the separate **Booking stages** section. A workflow can match booking type, any linked artist, promoter, country, and pipeline stage. If several workflows match, the system selects the most specific workflow, then the highest priority, then the workflow key. **Complete booking** is the built-in catch-all.

An enabled workflow can enroll a booking automatically when it is created in, or moved to, the workflow's configured confirmed stage. Admins and Agents can also enroll an eligible booking manually from its **Booking automation** card. Each enrolled run keeps an immutable snapshot of the workflow and version, so later workflow edits affect new runs only.

Five tracked milestones

1. **Booking details confirmed**
2. **Contract reviewed and signed**
3. **Invoice reviewed and sent**
4. **Payment received**
5. **Itinerary published**

Workflows can configure the milestones, document templates, payment policy, checklist behavior, deadlines, reminders, escalation tasks, staff failure alerts, and portal behavior. A step can be planned, active, blocked, failed, completed, skipped, not applicable, or manually completed. Due and overdue states remain visible on the booking.

Review gates and exceptions

Automation can prepare work and inspect current records, but it does not bypass review gates: staff still review contracts and invoices before sending, record payment receipt, and review the itinerary before explicit publication. Configured reminders and escalations make overdue work visible. If a check fails, correct the record and retry it; a retry re-checks current records and **never resends** a document or email. Where enabled, staff can waive a readiness item or complete an active or blocked step manually with a recorded reason. The Automation log records enrollment, reminders, failures, retries, waivers, manual completion, and recovery.

Completing the workflow records that coordination finished; it does not claim the performance occurred, the invoice was paid, or later details cannot change. If a required signature, payment, booking detail, or itinerary publication later becomes incomplete, the run can **reopen** or fail under its configured policy. The audit log retains completion and recovery events, and automation never silently changes a pipeline stage that staff changed manually.

Deal Calculator

Open the Deal Calculator from the **Deal Calculator** button in the top toolbar. It lets you model the financial split of a show in real time:

- **Gross fee** — the total amount received from the promoter.
- **Agency commission** — set as a percentage; the calculator shows the agency's take.
- **Artist fee** — what the artist receives after commission.
- **Expenses** — itemised deductions (flights, hotels, backline, etc.).
- **Net to artist** — final amount after all deductions, in the booking currency.
- **Door deal** — for percentage-of-door arrangements, enter ticket price, capacity, and expected attendance to project income.

Save calculator presets for common commission splits so you don't have to re-enter them for every show.

Fees and commission for multiple artists

A booking can include more than one artist. Set an optional **booking fee** and **commission percentage** for each booked artist in the booking editor. A blank artist-specific commission uses the booking-level rate, then the artist profile rate; entering a value overrides those defaults for that booking, and clearing it restores the fallback.

Commission treatment stays booking-wide: **off gross** deducts each artist's commission from that artist's allocated fee, while **on top** keeps artist fees intact and adds the commission above them. The per-artist allocation flows through invoice components, artist statements, analytics, CSV exports, and contract calculations. Existing single-artist and older bookings continue to use their existing booking-level behavior.

Inline contract & invoice creation

From the booking's **Contract** or **Invoice** tabs, click the *Create Contract* or *Create Invoice* button to open a quick-creation sheet without navigating away from the booking. The sheet pre-fills the title, artist, and fee from the booking.

RSVP / availability check

Use the *Request RSVP* action to send the artist an availability check for the booking dates. The artist responds directly through the portal, and their response (including any note) appears in the booking's activity history.

CHAPTER 4

Calendar

What the calendar shows

The Calendar page brings bookings, availability blocks, appointments, and active holds into one schedule. Switch between week, month, and year views. Booking colours and stage labels help you distinguish shows and spot busy dates quickly.

Filtering

Use the filters at the top to narrow the calendar by artist or pipeline stage. Multiple filters can be active at once, and the active choices remain visible so an empty result is easy to explain.

Navigating months

Use the arrow buttons to move through the selected week, month, or year. Click **Today** to return to the current period.

Opening a booking from the calendar

Click any booking tile to open that booking's detail page. Use the browser's back button to return to the calendar at the same month.

Use Calendar's **Export** menu and choose **Subscribe (live feed)** to copy the private iCal link. You can filter the agency feed by artist and use it in Apple Calendar or Outlook. Feeds cover one year back through five years forward. Calendar apps refresh on their own schedule, so changes may not appear immediately. Treat the subscription URL as private: anyone with it may be able to read the feed.

CHAPTER 5

Operations (Itinerary, Travel, Tasks)

The **Operations** page is a read-only cross-booking dashboard for upcoming production work. It keeps itinerary readiness, travel, and staff-only tasks visible across the roster; editing remains inside each booking.

Itinerary

The **Itinerary Tracker** lists upcoming bookings by itinerary readiness: not created, in progress, ready, or sent to artist. Use it to see which shows need a final pass and open the exact booking without losing context.

Itinerary within a booking

The Itinerary is editable in the **Itinerary** section of each booking. There you can:

- Edit the artist-facing timetable, notes, contacts, attachments, and section order.
- Manage a Shared Checklist visible to staff and artists; promoter access is not available.
- Mark the itinerary ready, publish it to the Artist Portal, or email an approved snapshot.
- Review the artist-facing Itinerary and share a read-only Show Day link for stage managers and crew.

Internal Tasks

Use **Internal Tasks** for staff work such as chasing a technical specification or confirming a hotel. Assign each task to a team member and track completion from the booking or **Operations → Tasks**. Internal Tasks never appear to artists or promoters, and are excluded from the published Itinerary, Show Day link, PDF, and email attachment.

Shared Checklist

The **Shared Checklist** supports show preparation with the artist. Staff can add items and choose whether the artist may update status or notes. Shared Checklist items are not included in PDFs, itinerary emails, or public Show Day links.

Publish to Artist versus Send by email

Publish to Artist changes Artist Portal visibility (and the published Show Day projection) only; it does not send an email. **Send by email** sends the approved itinerary snapshot only to selected recipients and does not publish, republish, or change portal/public visibility.

The recipient picker can select from both **Contacts** and **Artists** without copying records, accept a manual email address, and remove recipients before sending. Duplicate addresses are detected case-insensitively. The same picker is used for itinerary, contract, and invoice emails.

Publication lifecycle

Editing published artist-facing content — including timetable, contacts, notes, attachments, sharing settings, or template content — withdraws the published version and returns it to a ready-to-publish state. Emailing does not republish it. Review the edits, then use **Publish to Artist** again to make the new version visible.

Itinerary templates

Build reusable timetable and notes structures in **Settings → Document templates → Itinerary Templates** and apply them to bookings instead of starting from scratch each time.

Travel

The booking's **Travel** tab stores transport: flights, trains, buses, cars, ferries, and notes. Stays belong in the separate **Accommodations** section. Use Operations to see travel and task readiness across the roster, then open the booking to edit.

Adding travel to a booking

Go to the **Travel** tab of any booking. Add a transport leg with its route, local departure and arrival times, reference, contact, confirmation file, and notes. Add hotel and other stay details separately under **Accommodations**.

Flight details and safe sharing

Enter the flight number, travel date, departure and arrival airports, and confirmed times manually. You can also save terminal information, booking references, contacts, and confirmation files. Saved flight details remain available for manual editing; check them against your travel confirmation and update them when arrangements change.

Check portal visibility before publishing: artists see only travel that their access settings permit, and public Show Day views expose only explicitly published, safe logistics, not booking references, private contacts, internal notes, or staff-only fields.

Internal Tasks

The Tasks tab shows all open staff-only tasks linked to bookings — things like "Send tech spec to venue" or "Confirm hotel check-in time". Each task has a due date, assigned team member, and a completion checkbox.

Adding tasks to a booking

Open the relevant booking from Operations to edit its Itinerary, Internal Tasks, or travel. Use the agency Tasks view for cross-booking to-dos with due dates and assignees.

CHAPTER 6

Artists

The roster

The **Artists** page opens with **Active** artists in a sortable desktop table or a readable mobile list. Search by name, or open **Filters** for genre, country, **Inactive**, or **All Artists**. There is no photo-grid switch. Alias names remain visible so linked stage names are easy to recognise.

The roster opens with **Active** artists. Use **Filters** for genre, country, **Inactive**, or **All Artists**. Inactive profiles retain their history without appearing in the everyday roster. Clearing optional filters returns to Active. There are no permanent status tabs or photo-grid switch.

Artist profile

Click any artist to open their profile. The profile is organised into tabs:

Tab	Contents
Overview	Name, genre, status, country, booking fee, commission %, default currency, social links, and biography.
Bookings	All bookings for this artist, filterable by stage. Analytics summary (total bookings, total invoiced) shown inline.
Files	All media and documents — press kit, logos, stage plots, technical and hospitality riders, biography, visa documents. Merges Media and Documents into one unified view.
Notes	Internal notes visible only to agency staff.
Availability	Availability calendar with hold-outs and blackout dates.
Portal	Portal access settings and profile-change request approvals.

Artist and member availability

The Availability tab lets you mark specific dates as unavailable (confirmed elsewhere), on hold, or available with conditions. Share a public availability link — promoters can view the artist's open dates without logging in.

Add individual band or duo members with their own email addresses and availability calendars. Whole-act blocks remain hard conflicts; member-specific conflicts are shown as warnings so staff can review who is affected before confirming a show.

Portal access

The Portal tab controls the artist's access to the Artist Portal:

1. Invite the artist and each eligible member email. Every address receives its own sign-up link and login.
2. Configure shared **permissions** for the artist profile — fees, invoices, travel, tentative shows, profile editing, availability, and document uploads.
3. Revoke access at any time from the same tab. The artist sees a clear "no access" screen immediately, even if they're mid-session.

The Portal tab labels each address as not invited, invited, active, or revoked. Existing pending invitations are resent instead of duplicated, and accepted accounts remain clearly identified.

When the same email matches another same-agency alias, the portal account can be linked automatically so one login can switch between the allowed artist profiles without creating duplicate accounts.

Profile-change approvals

If an artist edits their bio, contact details, or rider information through the portal, the change is flagged for review here before it's applied. Approve or reject each field change individually.

iCal subscription

In **Calendar → Export → Subscribe (live feed)**, select an artist and copy the private iCal URL for Apple Calendar or Outlook. Feed visibility follows the calendar's sharing and stage rules. Subscribed calendar apps refresh on their own schedule.

> **Independent artist mode:** for a single-artist workspace, the *Artists* nav item becomes *My Profile* and opens your own artist record directly. There is no separate agency approving your profile or taking a booking commission. Your full performance fee is artist income before tax and expenses. Save your own profile, bank and tax details directly. Use **Collaborators** for people helping with your shows.

Independent artist mode keeps booking, finance, itinerary, travel, files, and portal tools in one sole-artist workspace. New bookings link to that artist automatically; **My Profile** replaces the roster and **Collaborators** replaces Team. Staff Inbox and booking Conversation are hidden because there is no agency-to-artist messaging boundary. A workspace Admin may self-link portal access only to the workspace's sole artist.

CHAPTER 7

Contacts

The Contacts hub

All your CRM data lives in the Contacts hub, split into three tabs:

People

Individual contacts — managers, press agents, crew, and anyone else who doesn't fit the promoter or venue category.

Promoters

Companies and individuals who promote shows. Linked to bookings for Bill To pre-fill on invoices and contract addresses.

Venues

Venues with capacity, address, and technical notes. Linked to bookings for the performance location.

Unified search

A single search bar at the top of the Contacts hub searches across all three categories simultaneously. Results are grouped by type so you can find the right person, company, or venue in one search — no need to switch tabs first.

Creating and editing contacts

Click **+ Add** on any tab to create a new entry. Click an existing entry to open its detail page, where you can edit every field, see linked bookings, and add notes.

Recently-used suggestions

When selecting a venue or promoter on a new booking, your five most recently-used options appear at the top of the picker before you start typing. This speeds up the workflow when you frequently book the same venues or work with the same promoters.

Keep each promoter's email address up to date so booking messages and documents reach the right contact.

CHAPTER 8

Financial

The **Financial** section is your hub for commercial documents, organised into **Contracts**, **Invoices**, and **Statements** tabs. Each booking also keeps its own contract and invoices attached to the show.

Contracts

Contracts live in the Financial → Contracts tab and are also accessible from each booking's Contract tab. Each contract has a full lifecycle:

Draft → Sent → Signed → Void

Rich text editor

The contract body uses a full rich-text editor with a formatting toolbar: bold, italic, underline, headings, bullet and numbered lists, and alignment. Use the **Insert merge tag** menu to drop in live data that's filled in when the contract is generated:

{{artist_name}}
Full artist name from their profile.

{{event_date}}
Date of the show in long format.

{{venue_name}}
Venue name linked to the booking.

{{fee}}
Agreed fee with currency symbol.

{{promoter_name}}
Promoter company or contact name.

{{contract_number}}
Auto-assigned contract reference.

Switch to the **Preview** tab at any time to see the contract rendered with sample data. Merge tags are highlighted in yellow for easy identification.

Contract templates

Save reusable contract bodies in **Settings → Document templates → Contract Templates**. When creating a new contract, selecting a template populates the body automatically.

Terms & Conditions

T&C templates are managed separately in **Settings → Document templates → Terms & Conditions**. When a T&C template is attached to a contract, its content is appended as additional pages when the contract is downloaded or sent as a PDF. You can set a default T&C template for the agency, which is attached to new auto-generated contracts.

Promoter-facing files for every artist

All artists in a booking are equal. Shared booking agreements cover the complete lineup, and the draft prepares eligible promoter-facing files for **every booked artist**. Technical and hospitality riders and press kits are grouped and labelled by artist. Private artist files are not added to the contract and are never shared with the promoter.

Review the complete contract package

1. Open **Edit Contract** and review each artist group. Use **Add file** to include a booking-specific document.
2. Remove any file that should not be sent. To replace an outdated file, remove it and add the current version.
3. Check that every file is current, belongs to the labelled artist, and is suitable for the promoter.
4. If the workflow requires attachment review, open **View this artist's files** and choose **I've checked this artist's files** for every artist.
5. Preview the PDF, then use **Approve & send** only after the full package is correct.

> ⚠ Document review is revision-bound: changing a draft's attachment package makes earlier acknowledgements stale, so the package must be checked again. Missing or unavailable files are flagged and sending remains locked until the required artist reviews and PDF preview can be verified.

Sending and signing

Click **Send for signature** on any draft contract. The send dialog pre-fills the promoter's email address from the linked booking automatically — edit it if needed, or leave it blank to generate a signing link you share yourself. The promoter receives an email with a secure link, fills in their name and email on the signing page, and clicks *Sign* — no login required. Once signed, you receive a notification and the contract status changes to *Signed*.

> Set an expiry date on contracts. If the promoter hasn't signed by that date, the signing link stops working. The send dialog shows a clear warning if the deadline has already passed and blocks sending until you extend the date. Unsigned contracts send reminder emails after a configurable number of days.

Invoices

Invoices are created from the Financial → Invoices tab or directly from a booking's Invoice tab using the quick-creation sheet.

Component lines for multi-artist bookings

Selecting a booking prepares its stored financial components as invoice rows. A multi-artist booking can have a separate **artist fee** row for each booked artist plus an **agency booking fee** row when applicable. These rows make up one promoter invoice; Agency Assistant does not create a separate invoice per artist.

Each artist row uses that artist's allocated booking fee and effective commission rate. Once an invoice is issued, its stored component lines are authoritative for historical reporting, even if the booking is edited later. Draft invoices may be reviewed and corrected before sending; sent and paid invoices are not silently repriced.

Invoice PDFs and printing

Invoice PDFs and browser printing place bank transfer details directly below the payment schedule, with the Agency Assistant logo aligned in the upper-right corner. There is no generated-date note in the footer. Ordinary invoices stay compact; longer notes or payment instructions continue onto another page when needed, without losing content.

Downloading or printing an invoice does not email it or mark it as sent. Use the reviewed email-delivery action, or confirm manual delivery separately after you have delivered it.

Independent artist invoices: your full performance fee is artist income, not an agency commission. New performance fees and standalone invoices use 9% VAT when no rate is saved. This is an app default, not tax advice. Review your actual saved rate, including 0%, and keep agreed terms and issued invoices unchanged.

Invoice fields

- **Bill to** — auto-filled from the booking's promoter, editable.
- **Line items** — artist-fee, agency booking-fee, or manual rows with a description, quantity, unit price, and independent VAT rate.
- **Currency** — pre-filled from the booking currency. Every line on one invoice uses that single currency; mixed currencies within one invoice are not supported.
- **Due date** — date by which payment is expected.
- **Invoice number:** auto-assigned from your prefix, configured in Settings → Business details → More options.
- **Notes** — payment instructions and any additional text.

VAT by component

Each artist-fee and agency booking-fee row has its own editable **VAT %**. New rows use the agency's sensible artist-fee and booking-fee VAT defaults. Review those defaults and change the rate on any eligible draft when the components need different tax treatment.

Payment-plan invoice limits

For an invoice owned by a booking payment plan, the installment's net amount, description, quantity, currency, and withholding are locked. VAT remains editable before sending, along with the invoice number, due date, notes, and billing details. A VAT change recalculates tax and the invoice total without changing the agreed installment principal.

> ✓ Invoice totals and VAT summaries are calculated from the stored component lines. The on-screen preview, PDF and email attachment, Peppol output, and CSV exports all follow those same rows and rates.

Online invoice payment

Admins can optionally connect the agency's Stripe account in **Settings → Business details → Invoices & payments** with its credentials and webhook signing secret. When online card payment is enabled, issued invoice emails and PDFs include a secure **Pay invoice** link; the promoter can pay without an Agency Assistant login. The invoice is marked paid only after a verified Stripe webhook (the browser return is a fallback), and void or cancelled invoices cannot be paid. Bank transfer instructions and manually recorded payments continue to work when Stripe is off.

Invoice lifecycle

Draft → Sent → Paid / or / Overdue

Peppol / EN 16931 e-invoicing

If your clients require structured electronic invoices, Agency Assistant can generate a Peppol-compliant UBL XML file for any invoice. Click **Download Peppol XML** on a sent or paid invoice. The file passes EN 16931 validation and is ready to submit to e-invoicing networks in Europe.

Invoice date filter

The date range filter at the top of the Invoices page narrows both the **on-screen list** and the CSV export to the selected period. This makes it easy to review invoices for a specific month or quarter without exporting first.

Artist statements

Use Financial → Statements to generate an artist's statement for a chosen period. Statements show that artist's allocated fees, booking and management commission, expenses, withholding, and net earnings, and can be downloaded as PDF or CSV. Monthly statements follow the same financial privacy rules. Older unallocated bookings retain their original financial attribution until reviewed.

CHAPTER 9

Analytics

Overview

The Analytics page gives you a financial and operational summary of your agency's performance across any date range. All monetary figures are converted to your agency's base currency for a consistent view, even when bookings are in different currencies.

Analytics focuses on booking and financial results, without a separate Team activity table. Audit events are retained in the relevant record histories; removing the table does not delete them.

Revenue by period

Bar chart of total invoiced revenue per month or quarter, filterable by artist.

Revenue by currency

Breakdown of shows and fees by original currency, converted at live exchange rates.

Top artists

Ranked list of artists by total invoiced value and number of confirmed shows.

Top venues

Most frequently booked venues and total revenue generated at each.

Pipeline health

Count of bookings in each pipeline stage — helps forecast how much confirmed revenue is in the pipeline.

Invoice status

Total outstanding, overdue, and paid invoices for the selected period.

Date range filter

Use the date range picker at the top of the Analytics page to narrow the data to a specific period. The default view is the current calendar year. Export the summary to CSV for use in external reporting tools.

Exchange rates are refreshed from a live source and cached server-side. Amounts shown in the base currency are conversions from the booking's original currency using the rate at time of calculation, not the date of the show.

CHAPTER 10

Inbox & Messaging

Starting a conversation

You can start a message thread with any artist from the **Inbox** or directly from a booking's **Conversation** tab. The booking view shows the thread relevant to that show; if no thread exists, starting one creates it and links it to the booking.

Booking-linked threads

Messages sent from the Messages area appear in both the staff Inbox and the artist's portal Messages page. They are labelled with the booking title so both staff and artist know which show the conversation relates to.

Searching messages

Use the Inbox search to find a thread by artist, booking, or thread title. Results are paginated when more matches exist than fit on one page.

Real-time updates

New messages appear in the Inbox and Messages area without a manual refresh. The unread badge updates as threads change. On mobile or in the installed PWA, enabled push notifications can alert staff to new artist messages.

Announcements

Send an announcement from the Inbox to a selected artist audience. Announcements appear with a distinct visual treatment in the artist portal so they cannot be mistaken for a normal conversation message.

> Enable push notifications from the user dropdown (your name → *Notification preferences*) to receive real-time alerts on your device when an artist sends a message or signs a contract.

CHAPTER 11

Settings

Open Settings at the bottom of the sidebar. Business details groups workspace identity, email, tax, banking and optional online payments. Search for a setting, or open **More options** for less frequent controls. Optional workflow and booking-stage controls are under **Advanced customization**; the standard contract, invoice and itinerary process needs no workflow setup. Available sections depend on your role and workspace type. On a phone, use the section selector.

Business details

Configure the core identity of your workspace:

- **Agency name** — shown throughout the app and in emails sent to artists and promoters.
- **Default currency** — the base currency used for analytics conversions and new booking defaults.
- **Timezone** — used when displaying times throughout the app.
- **Logo** — uploaded logo appears in the sidebar, in artist portal headers, and in emails.
- **Email identity** — choose the agency display name and Reply-To address. Transactional mail is sent from the shared platform address **hello@agency-assistant.app**; no client Resend account, sending-domain registration, DNS records, or email-provider credentials are required.

Team / Collaborators

Invite and manage team members. Each member is assigned a role that controls their access:

Role	What they can do
Admin	Manages the workspace, collaborators, booking automation workflows, settings, and billing.
Agent	Works with bookings and operations, including automation runs, itinerary publication, and manual travel records.
Finance	Works with permitted financial data; does not manage booking automation or itinerary publication.
Read-only	View permitted workspace records without editing them. Personal notification read and clear actions remain available.

The workspace **Owner** has administrative access. Invitations offer Admin, Agent, Finance, or Read-only; they do not transfer workspace ownership.

To invite a new team member, enter their email and choose a role, then click **Send invite**. They receive an email with a sign-up link and are added to the team automatically upon sign-in. Existing members and

pending invitations are detected so the same person is not invited twice.

Invoices & payments

This is part of Business details, not a separate setup step. Tax and banking remain easy to find; optional invoice wording, numbering, reminders and statements are under More options. Reviewed booking contracts lead the agreed financial terms of their invoices. Defaults remain available for standalone invoices and never rewrite agreed terms or issued history.

Configure your agency's billing details — these appear on every invoice PDF:

- Legal company name, VAT number, address, phone, registration number, tax ID, country
- Bank details (IBAN, BIC, bank name, payment instructions)
- Invoice prefix and default VAT rate
- Automated payment reminders (days after due date, repeat frequency)
- Monthly artist statements (enable/disable, email subject and intro)

Document templates

Open **Settings → Document templates** for contract, terms and itinerary templates:

Contract templates

Create and manage reusable contract bodies using the rich-text editor. Each template can include merge tags. When creating a contract, select a template to populate the body in one click.

Terms & Conditions

Manage your T&C documents separately from contract bodies. Each T&C template has a name and a full rich-text body. Attach a T&C to any contract — it's appended as PDF pages after the signature block. Set one template as the agency default to auto-attach it to every new contract.

Itinerary templates

Build reusable timetable and notes structures that can be applied to bookings. This saves time for recurring show types such as festival slots or club dates.

Booking stages

Configure the booking stages used by your workspace: rename, reorder, enable, or disable stages, and choose which enabled stages are visible in the Artist Portal. Admins manage booking automation workflows elsewhere in Settings, including their matching rules, confirmed-stage enrollment, priorities, milestones, deadlines, reminders, escalation, and review safeguards.

Notifications

Enable push notifications for this device and use the available test action to check delivery. Repeat setup on each device. Authorized administrators can review history-retention controls under More options. Invoice reminders remain under Business details; booking-workflow reminders remain under Advanced customization.

Google Calendar connection controls and shortcuts are temporarily hidden. The app's Calendar and private iCal subscriptions for Apple Calendar or Outlook remain available. Saved connections are retained.

Subscription

Admins can view and manage the workspace’s billing settings where billing is available. Billing does not change access to booking, finance, or portal features; use the role permissions above to determine who can perform each task.

CHAPTER 12

AI Assistant

Opening the assistant

Click the **sparkles icon** in the top bar to open the AI Assistant drawer. It slides in from the right side of the screen without leaving your current page.

What you can ask

The assistant has context about your agency's data — bookings, artists, invoices, and contracts — so you can ask natural-language questions and get answers grounded in your real data:

You can also ask how to use the current dashboard, roster filters, or notification controls. It explains the compact Needs attention list, Active/Inactive roster choices, and saved folded sections, without suggesting removed photo-grid or Team activity controls. It cannot change filters, toggle panels, read your notifications, or mark them read.

Summaries

"What shows do we have confirmed in October?" or "Summarise this month's invoiced revenue."

✍ Drafting

"Draft a follow-up email to the promoter asking for the technical rider" or "Write a short bio for this artist."

Finding things

"Which bookings are missing a contract?" or "Show me unsigned contracts from the last 30 days."

Calculations

"What is the net fee after 20% commission and €500 of expenses on a €5,000 gross?" — done instantly.

Conversation history

Each session maintains a conversation so you can follow up on previous messages. The history is cleared when you close and reopen the drawer, giving you a clean slate for each session.

Email guidance

The assistant can draft email text and explain the delivery workflow, but it cannot send an email for you. Contracts, invoices, itineraries, reminders, and other transactional messages are sent only when you approve them in their normal review or send screen.

Recipients see your agency display name with **hello@agency-assistant.app** as the From address, and replies go to the Reply-To address saved under **Settings → Business details → Email identity**. You never need to configure a custom sending domain, DNS records, Resend account, or provider credentials.

The AI assistant works best for questions about your own data or for generating text. For financial calculations involving multiple currencies, it uses your agency's live exchange rates. It does not have access to information outside your agency account.

CHAPTER 13

Artist portal

The Artist Portal is the artist-facing side of Agency Assistant. Artists and individual band members sign in at the same URL as staff and are automatically routed to their portal. Each invited email has its own login. On mobile, the bottom bar keeps Home, Shows, Calendar, Messages, and More within reach; More opens the remaining destinations.

Use the portal navigation to move between **Home**, **Shows**, **Calendar**, and **Messages**; open **More** for Payments, Files, Travel, Profile, and Settings. What appears in a section depends on the artist profile's access permissions and what staff have published.

Home
Dashboard overview of upcoming shows and recent messages.

Shows
Full list of bookings the artist is on.

Calendar
Shows in a monthly calendar view.

Messages
Inbox for messages from the agency, with unread badge.

More
Payments, Files, Travel, Profile, and Settings.

Updates
The header bell opens show, payment, document, reminder, and announcement history.

Home

The portal home prioritises pending actions, upcoming shows, the next travel item, payment notices, and unread messages. When there is nothing to act on, the page stays compact instead of showing empty panels.

Shows

The Shows page lists bookings in enabled portal-visible stages that the selected artist may access, sorted by date. Tap a show to open the booking detail view, which can show:

- Show details: date, venue, promoter, fee (if permission is granted), and stage.
- Shared Checklist: preparation items the artist may be allowed to update with a status or note.
- Travel details: flights, ground transport, and hotels (if permission is granted).
- Published Itinerary: a read-only artist briefing for the performance day.

Availability RSVP

When an agent sends an availability check for a date, it appears as a notification in the artist's portal. The artist can confirm availability or decline — and can add a note *in both cases* to communicate conditions,

conflicts, or anything else the agent should know. The note is visible on the booking's History tab.

Multiple aliases, one login

If the same email belongs to multiple linked artist profiles in one agency, the user can switch between those aliases from the avatar menu. Shows, payments, files, travel, and updates reload for the selected profile.

Files

The Files page combines personal documents and files shared by the agency. Artists can upload permitted personal documents and open or download shared riders, press material, travel documents, and show files.

Messages

The Messages section shows all threads with the agency. Booking-linked threads are labelled with the show title. Announcements from the agency appear with a visual highlight. The unread count badge on the nav updates in real time.

Profile

The artist can update their own biography, contact details (email, phone, website, social links), emergency contact, travel preferences (passport expiry, dietary, hospitality, technical preferences). Changes that need agency approval are flagged as pending until an admin reviews them.

The artist can also update their profile photo — upload or remove a photo at any time.

Payments

If the artist has financial permission, Payments shows the artist's own show fees, recorded payment information, agency invoicing details, and statement downloads. Paid totals are based on recorded invoice payments, not invoice face values. Each artist's totals follow their own allocation, never another artist's fee or the full shared booking amount.

Settings

The artist can manage notification preferences, device push notifications, timezone, and a private personal iCal subscription. The copied calendar URL is a live feed and should be treated as private. Push alerts use generic lock-screen wording such as “Open the app to read” and never expose message text,

availability reasons, booking titles, artist names, contract titles, or signer names. Push and email preferences are per artist and per device, so turning off one device does not change another.

CHAPTER 14

Contract signing

How the signing flow works

When staff send a contract for signature, the promoter receives an email with a secure, unique signing link. No account is required — the link works for anyone who receives it.

1. The promoter opens the link and sees the **full contract body**, formatted and styled, with all merge tags filled in.
2. If a Terms & Conditions document is attached, it is displayed below the main body. The promoter must scroll through the full document before signing.
3. The promoter enters their **name and email address** in the signature section and clicks *Sign contract*.
4. The promoter signature is recorded. The contract becomes **fully signed** only when both the promoter and agency signatures are present; either party may sign first.

> ⚠ Each signing link is single-use per token. If a contract is voided and re-sent, a new unique link is generated and the old one stops working. Cancelled bookings' signing links are automatically deactivated.

After signing

Once signed, the contract is available as a PDF download for both the agency and the promoter. The signed PDF includes the full contract body, any attached T&C pages, the signer's name, email, timestamp, and IP address for legal record.

Contract reminder emails

If a contract remains unsigned for a configurable number of days after being sent, an automatic reminder email is sent to the promoter. The number of days and maximum number of reminders are set in **Settings → Business details → More options → Reminders**.