SyncCatalog

Complete User & Administrator Manual

Version 2.3 | Illustrated edition | September 21, 2026

Music licensing operations: catalog • rights • submissions • pitching • licensing • CRM • collaboration

For catalog owners, publishers, licensing teams, administrators, reviewers, and sales users

About This Manual

This manual documents the current SyncCatalog product as a working music-licensing operations system. It is written for customers and staff who need to understand not only what each feature is called, but what it does, who can use it, what information it stores, and how it connects to the rest of the workflow.

IMPORTANT: Implemented features vs. configuration slots
OpenAI is the active customer-work AI provider and Daily is the active video provider. Anthropic and Google Gemini are future provider registrations, not current customer-work AI engines.

NOTE: Plan-dependent features
Lite is single-user; Starter has two internal seats and OpenAI metadata assistance; full collaboration and contextual Ask SyncCatalog begin with Professional; bulk AI begins with Business. Broader integrations begin with Professional. Active track allowances come from the organization plan.

NOTE: Rights responsibility
SyncCatalog records rights and clearance information but does not independently establish copyright ownership or legal authority. Users remain responsible for verifying rights, approvals, restrictions, and license terms.

Notation used throughout the manual: “Owner/Admin” means an organization owner or administrator. “Catalog Manager” means the catalog_manager role. “Pitch Room” means the token-secured recipient portal associated with a pitch. “Public” means a route that does not require an internal SyncCatalog login.

Version 2.3 update

This edition finalizes the AI plan model: general Ask SyncCatalog help on every plan, customer-connected OpenAI for customer-work AI, contextual record help on Professional+, bulk AI on Business+, and local AI simulation in active client demo sandboxes.

Contents

PART I

Getting Started

1. What SyncCatalog Is

SyncCatalog is designed around the full operating cycle of a sync-licensing business rather than a simple music database. A catalog record can feed submission review, rights clearance, public discovery, pitching, recipient portals, license inquiries, CRM records, tasks, deadlines, team collaboration, and support workflows.

Core workflow

1. Music enters the system through manual catalog entry, bulk import, or an accepted submission.

2. The catalog team completes descriptive metadata, audio versions, rights, writers, publishers, deliverables, and clearance information.

3. Pitch Readiness identifies blocking gaps and warnings before music is presented.

4. Music can be exposed in the public catalog or selected into a private pitch.

5. A recipient can listen in a private Pitch Room, request materials, and receive explicitly approved downloadable files.

6. License inquiries, clients, projects, tasks, calendar deadlines, messages and follow-up stay connected to the same organization workspace.

What SyncCatalog does not do automatically

- It does not guarantee placements or licensing revenue.
- It does not determine copyright ownership on its own.
- It does not make a rights record legally correct merely because all fields are filled in.
- It does not expose private catalog files for download unless a workflow explicitly authorizes delivery.
- It does not automatically make every configured third-party provider operational; provider adapters must be supported and connected.

2. Accounts, Sign-In and Passwords

Internal organization users

Internal users sign in with individual accounts. Each account can belong to an active organization and receives a role through the organization-user relationship. Never share an owner or administrator login; permissions, activity and notifications are tied to the individual user.

Temporary-password accounts

An Owner/Admin can add a team member directly. If a new account is created with a temporary password, SyncCatalog marks the account for a mandatory password change. On the next authenticated request, the user is directed to the Change Password screen before normal work continues.

1. Sign in with the temporary credentials supplied by the administrator.

2. Open the required Change Password screen.

3. Enter the current temporary password, then create and confirm a new password that meets the displayed policy.

4. After the change succeeds, SyncCatalog clears the forced-change requirement and regenerates the session.

Forgot Password / Reset Password

1. Choose Forgot Password from the sign-in page.

2. Enter the account email address. The response is deliberately neutral whether or not the email exists.

3. For an active eligible account, follow the password-reset link delivered through the configured notification channel.

4. Create a new password. Reusing the current password is rejected.

5. After a successful reset, the temporary-password flag is cleared and database sessions other than the current valid flow are invalidated where applicable.

NOTE: Reset-link security
Reset tokens expire. The current production recovery flow uses a 60-minute expiration window. Inactive accounts do not receive reset notifications.

Submitter accounts

Artist/submitter accounts use the public registration flow and are separate from internal team membership. Submitters can use the artist submission workspace and My Submissions without receiving internal organization permissions.

3. Navigation and Theme

The left navigation adapts to the signed-in user's role, plan and enabled features. A missing menu item usually means the role does not have the corresponding capability or the current plan does not include that feature.

Typical Workspace navigation

- Dashboard
- Catalog
- Artists
- Calendar
- Pitches (when permitted)
- CRM / Clients
- Submissions (when permitted)
- Team (when plan-enabled)
- License Requests (when permitted)

Typical System navigation

- Settings / Public Access
- Integrations (when plan and role permit)
- Notifications (team-enabled plans)
- Help & Support
- Platform-administration links for platform administrators

Light and dark mode

Use the Light/Dark theme control in the sidebar. The preference is stored in the browser, so changing browsers or clearing browser storage can reset the appearance. Theme choice does not change permissions or data.

Ask SyncCatalog launcher

Ask SyncCatalog appears as a floating help launcher on supported public and authenticated screens. In the current hosted interface, the assistant launcher occupies the lower-left corner while the Direct Messages launcher remains in the lower-right. General product help is available on every plan; eligible contextual record assistance depends on plan access and a connected organization OpenAI account, except in active demo sandboxes where contextual AI is simulated locally.

1. Select Ask SyncCatalog to open the assistant panel.

2. Ask a product question in ordinary language. On supported record-detail pages, Professional, Business and Enterprise organizations can also use a sanitized snapshot of the current record when OpenAI is connected; active client demos use a local simulator instead of an external AI call.

3. Select New to clear the current browser-tab conversation for that context and begin again.

4. Select × or press Escape to close the panel. Closing the panel does not modify the current record.

The launcher is intentionally omitted from some special-purpose authentication, guest, invitation, preview, and terms flows. Its absence on one of those screens does not indicate a permissions failure.

4. Roles and Permissions

SyncCatalog uses explicit capabilities. The table below reflects the current application authorization matrix.

Role	Manage catalog	Review submissions	Import submissions	Licensing	Pitches	CRM	Integrations	Team admin
Owner	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Admin	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Catalog Manager	Yes	Yes	Yes	No	Yes	No	No	No
Sales	No	No	No	Yes	Yes	Yes	No	No
Reviewer	No	Yes	No	No	No	No	No	No

NOTE: Viewing vs. managing
A user may be able to view a directory without being able to create or edit its records. For example, current tests allow Sales to view the artist directory while preventing Sales from creating artists; Reviewer can review submissions but cannot import them into the catalog.

Owner protections

- Only an Owner can create or alter another Owner role.
- An Admin cannot promote a member to Owner, demote an Owner, or remove an Owner.
- The final remaining Owner cannot be demoted; every organization must retain at least one Owner.

5. Plans, Limits and Feature Gates

Plan rules are enforced server-side, not merely hidden in the interface. An organization can therefore receive a clear limit/permission error even if a stale browser page still shows an action.

Track limits

The platform supports plan-level track allowances, including finite or custom/unlimited configurations. Any active allowance is enforced consistently when creating tracks manually, importing accepted submissions, and bulk-importing audio so one workflow cannot bypass the organization's plan. Specific commercial track allowances are intentionally not duplicated in this manual; use the current pricing/account information for the active offer.

Team seats

Internal organization members count against the seat limit; pending invitations also count so outstanding invites cannot overbook capacity. Current included internal seats are Lite 1, Starter 2, Professional 5, Business 15, and Enterprise custom.

External pitch recipients, public submitters and other non-member visitors do not consume internal seats. Full Team & Collaboration begins with Professional; Starter can manage its two internal users without receiving the Pro collaboration suite.

Integrations

Integration access is plan-gated and still requires Owner/Admin permission. Starter can connect OpenAI specifically for customer-work AI without receiving the broader external-integrations package; broader integrations begin with Professional.

Current plan and AI access

The table below summarizes the current hosted plan ladder relevant to internal seats and AI. Customer-work AI means AI that analyzes an organization's catalog or authenticated record context.

Plan	Internal seats	AI access
Lite	1	General Ask SyncCatalog product help
Starter	2	Lite help + connected OpenAI + single-track metadata suggestions/review
Professional	5	Starter AI + context-aware Ask SyncCatalog on supported records
Business	15	Professional AI + bulk AI catalog analysis/review
Enterprise	Custom	Business AI + custom configuration under the Enterprise agreement

General Ask SyncCatalog help uses SyncCatalog's platform-managed support AI. Customer-work AI on Starter and above uses the organization's connected OpenAI account and provider billing. SyncCatalog does not silently fall back to its own OpenAI credential for customer catalog or record analysis.

6. Dashboard

The Dashboard is the operational landing page. It summarizes relevant catalog, submission and licensing information and exposes shortcuts according to the user's role. A Sales user does not receive submission-review controls; a Reviewer does not receive licensing-management controls.

How to use the Dashboard

1. Scan the statistics and recent-work sections for items needing attention.

2. Use recent track/submission/license-request links to jump directly into work.

3. Use the Workspace navigation for deeper lists and search.

4. Use System navigation for settings, integrations, support and administrative tools.

NOTE: Public controls moved to Settings
Public Catalog and Public Submissions are managed together under Settings → Public Access in the current build. They are intentionally not duplicated as Dashboard switches.

PART II

Catalog & Rights

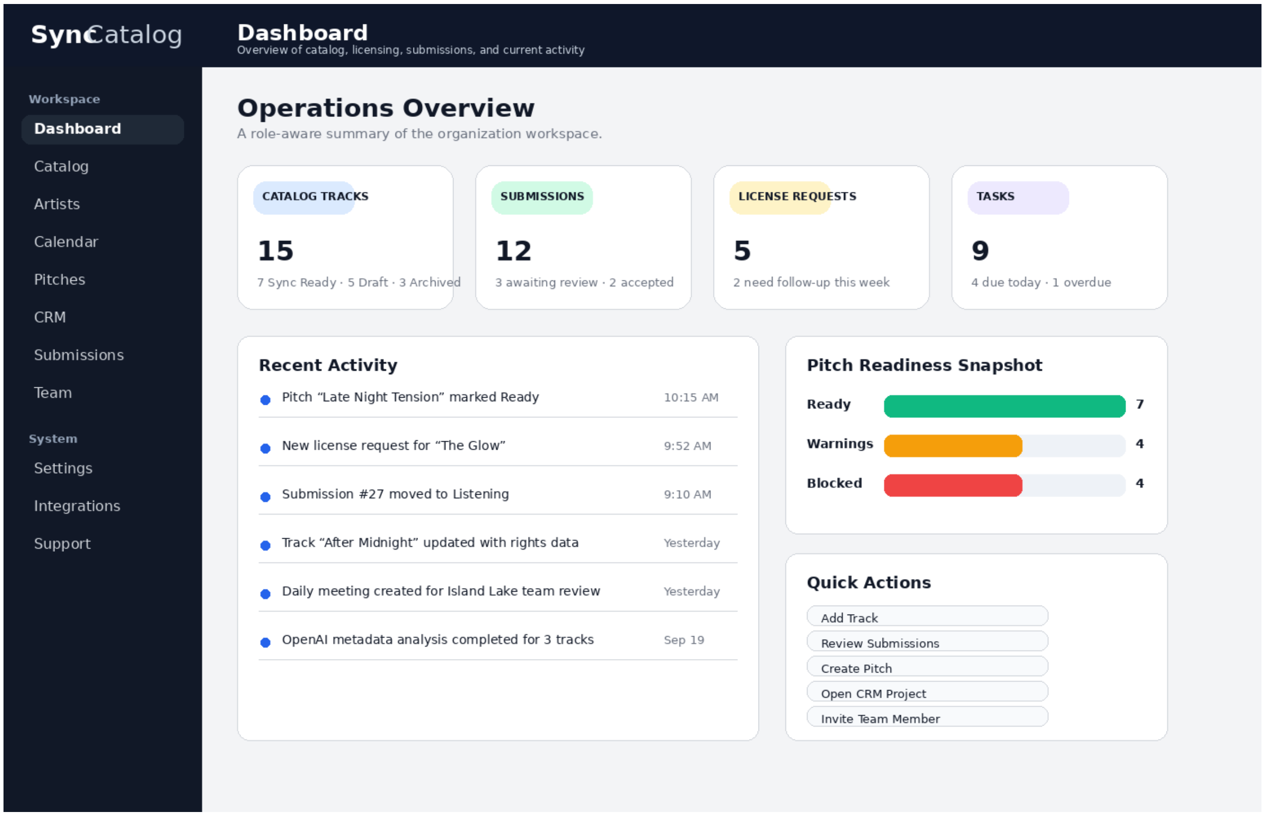

Figure 1. Dashboard overview showing operational cards, activity, readiness, and quick actions.

7. Catalog List, Search and Filtering

The Catalog is the central working list of recordings. It is organization-scoped: users cannot read or mutate tracks belonging to another SyncCatalog organization.

Catalog search

Search can match core track fields such as title, album, catalog number and artist relationships. The catalog list also supports workflow filters including track status, vocal type and tempo class. Pagination keeps large catalogs manageable.

Track statuses

Status	Meaning / recommended use
Draft	Incomplete working record. Use while audio, metadata, rights or other information is still being assembled.
Catalog Ready	Record is organized for internal catalog use but not necessarily cleared for pitching.
Sync Ready	Record is intended to be eligible for sync-facing use and is the status used by the public catalog.
Do Not Pitch	Keep the record but exclude it from pitching workflows.

Status	Meaning / recommended use
Archived	Retain historical data without treating the track as an active catalog item.

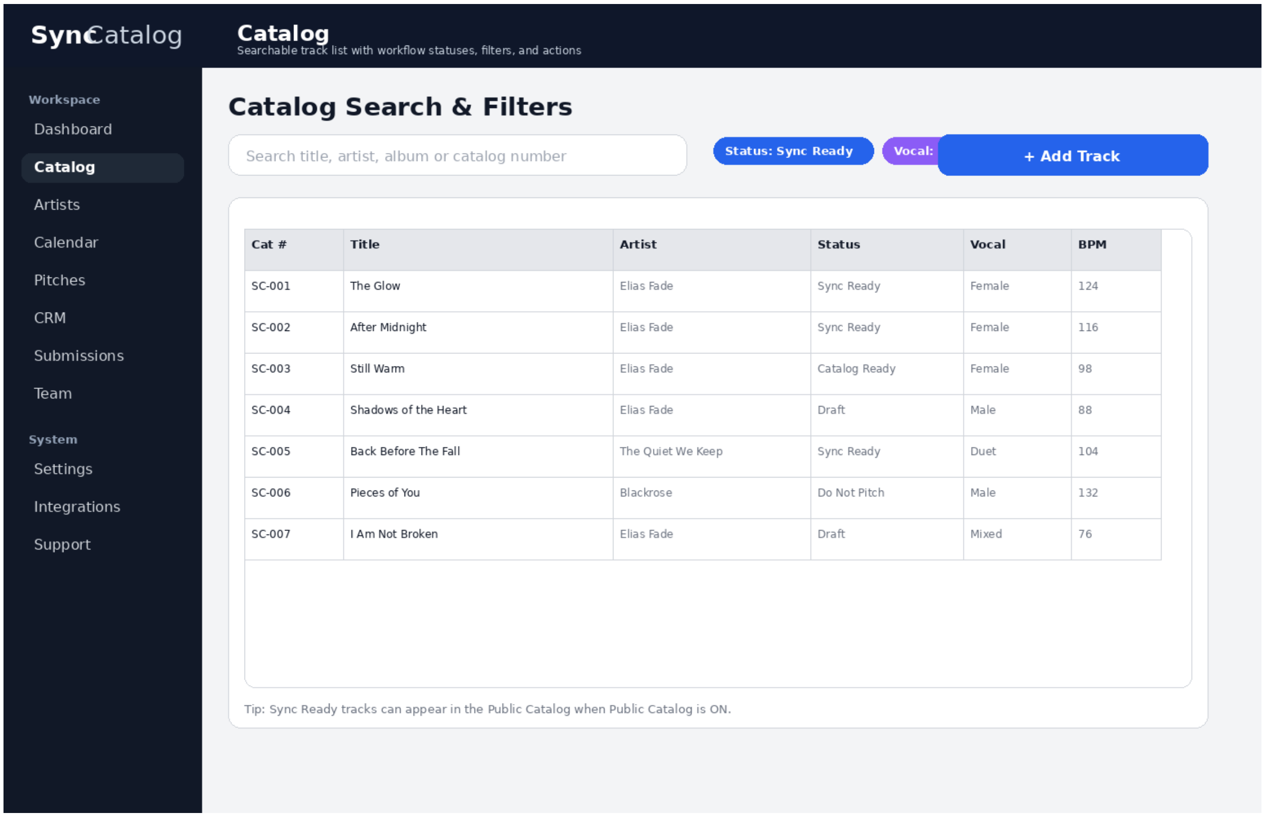

Figure 2. Catalog list view with search, filters, statuses, and the Add Track action.

8. Creating and Editing Tracks

Create a track manually

1. Open Catalog and choose Add/Create Track.

2. Enter the title and identify or create the artist relationship.

3. Add optional album and release-year information.

4. Choose the correct workflow status; Draft is the safest starting point for incomplete records.

5. Choose vocal type, tempo class and energy information where known.

6. Mark Explicit and Instrumental Available only when accurate.

7. Save the track, then continue into the full Track Editor for audio, metadata and rights.

Core track fields

Field	What it is used for
Catalog Number	Internal catalog identifier.

Field	What it is used for
Title	Track title used across catalog, pitches and requests.
Album	Optional project/release context.
Year Released	Optional release year.
Lyrics	Reference lyrics for internal/catalog use.
Explicit	Flags explicit content.
Vocal Type	Instrumental, Male, Female, Duet, Group, Mixed or Other.
Tempo Class	Slow, Medium or Fast.
Energy Level	Descriptive energy classification.
Instrumental Available	Quick indicator that an instrumental deliverable exists or can be supplied.
Status	Controls workflow state and public-catalog eligibility.

Track Editor sections

- Pitch Readiness summary
- Track Information
- Sync Metadata / tags
- AI Metadata Assistant when available
- Rights, writers, publishers and deliverables
- Audio versions and technical metadata
- Team comments on eligible plans
- Audio upload controls

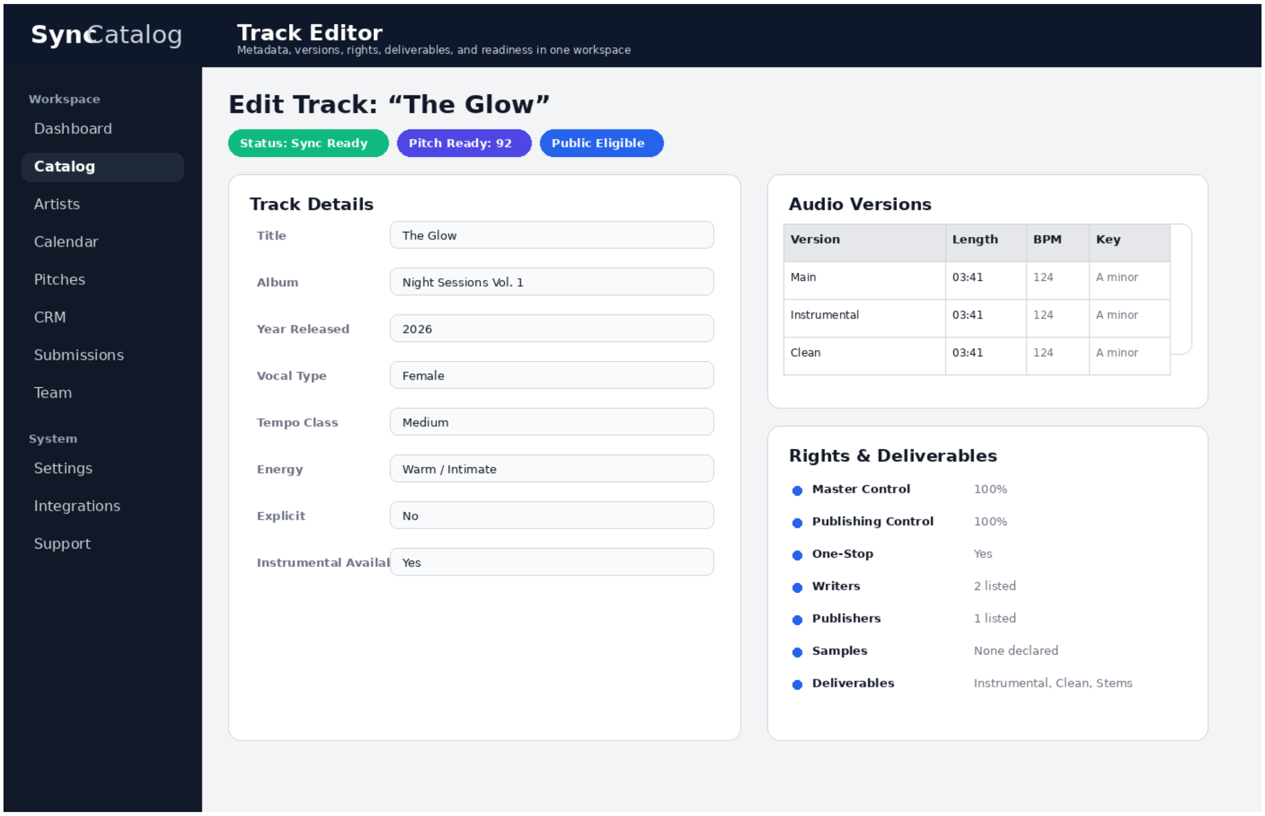

Figure 3. Representative Track Editor showing metadata, versions, rights, and deliverables in one workspace.

9. Artists

Artists are reusable organization records associated with tracks through track-artist relationships. The artist directory prevents repeated free-text names from becoming disconnected catalog entries.

Working with artists

1. Open Artists to browse the organization’s artist directory.

2. Open an artist to see the related catalog context.

3. Users with catalog-management permission can create and edit artist records.

4. When creating a track, select an existing artist when possible instead of creating a near-duplicate spelling.

> **NOTE: Role behavior**
> Sales can view the artist directory in the current authorization tests but cannot open the create-artist form. Reviewer cannot update artist records. Catalog changes are reserved for Owner, Admin and Catalog Manager roles.

Public artist pages

When the Public Catalog is enabled, public artist pages can show the artist’s eligible Sync Ready tracks. The public page is separate from the internal artist administration screen.

10. Audio Versions and Files

A track can contain multiple recording versions. SyncCatalog keeps versions under one track so alternate mixes do not become unrelated catalog records.

Supported version types

Version type	Typical use
Main	Primary master/listening version.
Instrumental	No lead vocal.
Clean	Edited version suitable for content restrictions.
Alternate	Alternate arrangement/mix.
Acapella	Vocal-focused version.
No Drums	Mix without drums.
Underscore	Dialogue-friendly or reduced mix.
60 sec / 30 sec / 15 sec	Timed cutdowns.
Sting	Short button/end-tag version.
Other	Version not covered above.

Upload listening audio

1. Open the track in Catalog → Edit.

2. In Audio Versions, choose the version type/name and upload the MP3.

3. SyncCatalog validates that the file is actually an MP3; renaming another file type to .mp3 is rejected.

4. The file is stored privately and linked to the selected track version.

5. Play it through SyncCatalog’s internal player/waveform interface to verify the upload.

NOTE: File limits
Standard catalog audio uploads are MP3-only and currently allow files up to 64 MB. Bulk import has a separate batch-count limit. Public and Pitch Room playback streams authorized files inline; general catalog downloads are not exposed.

Technical metadata

Where available, a version can carry duration, BPM, musical key, sample rate, bit depth, loudness (LUFS), true peak (dBTP), and ISRC. ISRC values are normalized to uppercase alphanumeric characters and must be 12 characters when supplied.

11. Bulk Import

Bulk Import is for adding multiple MP3s as draft catalog records. It is available only to users with catalog-management permission and still obeys the organization’s track limit.

1. Open the Bulk Import workspace from Catalog.

2. Select up to 20 MP3 files for the batch.

3. Start the import. SyncCatalog inspects the files and extracts available embedded metadata.

4. For each accepted file, SyncCatalog creates a Draft track, finds or creates the artist as appropriate, creates a Main version and stores the audio privately.

5. Where usable embedded genre metadata exists, it can be mapped into the organization's metadata structure.

6. Review the result summary. Invalid files and duplicate checksums are skipped/reported rather than silently imported twice.

7. Continue to Draft Review or the Track Editor to finish rights and metadata.

> **NOTE: Current batch limit**
> The current security tests reject more than 20 files in one bulk-import request.

12. Draft Review

Draft Review provides a staging workflow for newly imported or otherwise incomplete Draft tracks. Use it to prevent raw imports from being mistaken for fully prepared catalog entries.

1. Open Draft Review.

2. Review the imported track identity, artist and available metadata.

3. Open records that require corrections or additional rights/audio work.

4. Advance status only after the information needed by your organization has been checked.

5. Use Pitch Readiness before treating a track as ready for a pitch or public-facing use.

13. Sync Metadata and Taxonomy

Sync metadata describes creative characteristics that make music searchable for licensing. SyncCatalog separates these creative descriptors from legal/rights facts.

Primary search/tag categories

Category	Purpose
Genre	Musical style or genre.
Mood	Emotional tone.
Scene / Use	Creative situations, scenes or use-cases.
Lyrical Theme	What the lyric or narrative is about.
Instrumentation	Important instrumentation/production characteristics where configured.
Vocal	Vocal characteristics/classification.
Energy	Intensity/energy descriptor.
Era	Period/style reference where configured.
Tempo	Creative tempo descriptor in addition to BPM/tempo class.

Controlled taxonomy

The AI Taxonomy workspace lets catalog managers maintain allowed tag values. A starter taxonomy can be seeded, then organization-specific tags can be added, edited or removed. Using a controlled taxonomy keeps search terms consistent across the catalog and constrains AI suggestions to useful vocabulary.

14. AI Metadata Assistant

The live AI metadata workflow uses the organization’s connected OpenAI integration. Single-track metadata assistance is available on Starter, Professional, Business and Enterprise. It is intentionally limited to semantic/creative metadata and must not be treated as a source of truth for ownership, clearances, writer splits, ISRCs or other deterministic rights facts. Provider usage is billed through the organization’s OpenAI account.

Analyze one track

1. Connect and successfully test OpenAI under Settings → Integrations.

2. Open a track and use the AI Metadata Assistant.

3. Run Analyze. SyncCatalog sends the permitted track context to the configured AI workflow.

4. Review each returned category, suggested value, confidence and reason.

5. Accept only suggestions that fit the track. Reject incorrect or unhelpful suggestions.

6. Accepted/rejected history is retained; running analysis again replaces old pending OpenAI suggestions rather than erasing review history.

Business / Enterprise batch analysis

1. On Business or Enterprise, open Catalog → AI Metadata Batch.

2. Select between 1 and 5 organization tracks for the batch.

3. Run the batch analysis through the organization’s connected OpenAI account.

4. Open the AI Review queue to evaluate pending suggestions across the selected tracks.

5. Accept Selected or Reject Selected as appropriate.

High-confidence shortcut

Per-track review includes an action for accepting high-confidence pending suggestions. Treat confidence as a review aid, not proof. A human catalog manager remains responsible for the final metadata.

NOTE: Provider scope
OpenAI is the active customer-work AI adapter in this build. Anthropic and Google Gemini are registered future providers, but they are not current customer-facing AI engines and do not power the metadata, contextual-assistant or bulk-analysis workflows described in this manual. Active client demo sandboxes use a local deterministic simulator for demonstration AI and make no external AI request.

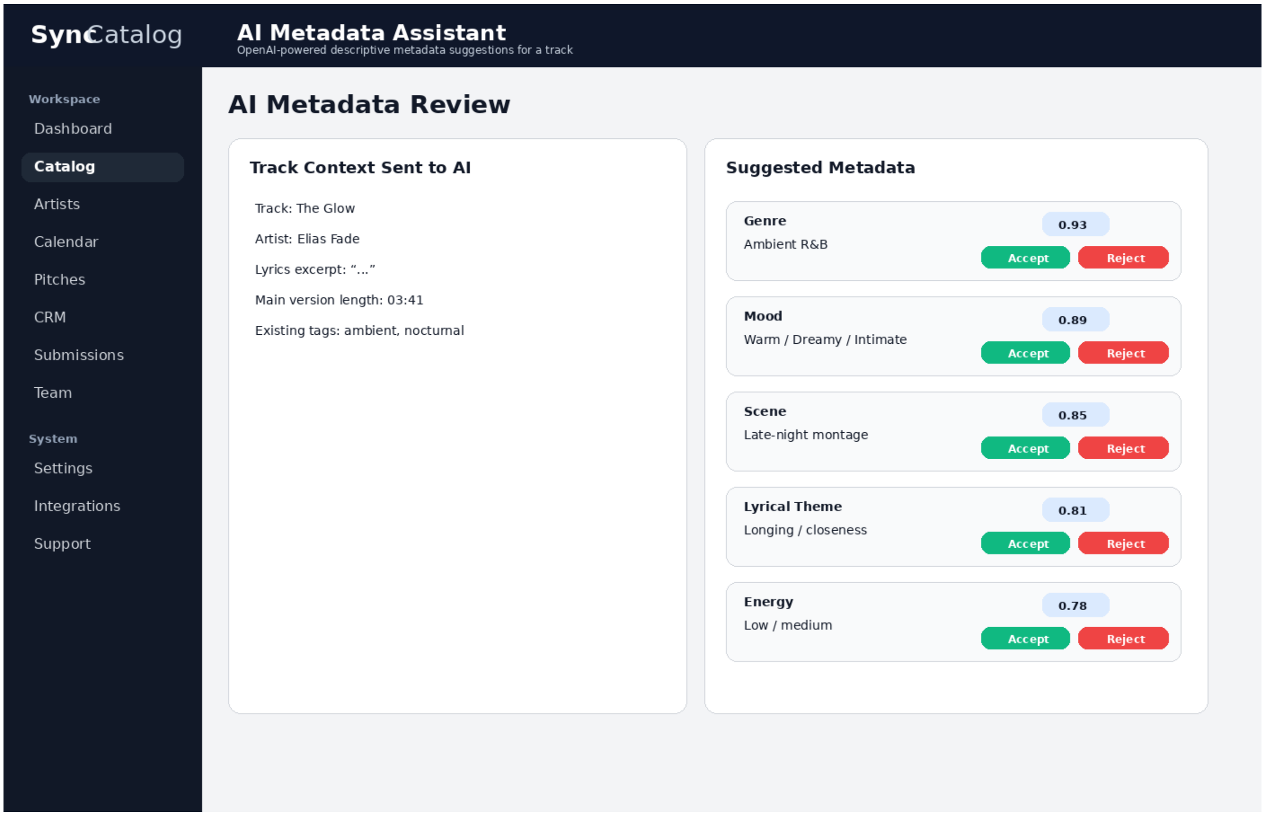

Figure 4. AI Metadata review workspace with descriptive suggestions and Accept / Reject controls.

15. Rights and Clearance Record

Rights data is structured so a licensing team can distinguish ownership, control, confirmation, third-party issues and restrictions rather than collapsing everything into one "cleared" checkbox.

Field	Meaning
Master Owner	Entity identified as owner/controller of the sound recording.
Publishing Owner	Entity identified for composition/publishing ownership.
Master Control %	Percentage of master rights the organization can control, 0–100.
Publishing Control %	Percentage of publishing the organization can control, 0–100.
One Stop	Indicates that the necessary sides can be cleared through one controlling source when accurate.
Master Clearance Confirmed	Internal confirmation that master clearance has been verified.
Publishing Clearance Confirmed	Internal confirmation that publishing clearance has been verified.
Contains Samples	Tri-state answer: unknown, yes or no.
Contains Interpolations	Tri-state answer: unknown, yes or no.
Third-Party Approval Required	Tri-state answer for additional approval requirements.
Restrictions	Specific restrictions that affect licensing.

Field	Meaning
Rights Notes	Internal context, exceptions or follow-up information.

1. Open the track and locate Rights & Deliverables.

2. Enter owners and control percentages based on actual agreements or verified records.

3. Set master/publishing confirmation only when each side has truly been reviewed.

4. Record samples, interpolations and third-party approval requirements explicitly.

5. Use Restrictions and Rights Notes for information the licensing team must not miss.

6. Save, then re-check Pitch Readiness.

16. Writers, Publishers and Splits

Writer and publisher records are stored separately and can be reused across tracks. This supports more accurate rights data than a single free-text credits field.

Writer fields

- Name
- PRO affiliation
- IPI/CAE number
- Ownership percentage

Publisher fields

- Publisher name
- PRO affiliation
- IPI/CAE number
- Ownership percentage

NOTE: Split validation
A track can hold up to 25 writer rows and 25 publisher rows. Duplicate writer or publisher names on the same track are blocked. Incomplete totals may be saved while work is in progress, but a total over 100% is rejected.

1. Add each writer and publisher separately.

2. Enter PRO/IPI details where known and verified.

3. Enter ownership percentages from the controlling documentation.

4. Resolve duplicate spellings rather than creating two versions of the same party.

5. Before licensing, confirm that the aggregate information matches the actual agreement chain.

17. Deliverables

Deliverable availability is recorded independently from the audio versions currently uploaded for listening. This allows the licensing team to know what can be supplied even when the high-resolution delivery asset is stored elsewhere.

Deliverable types	Examples
Core alternates	Instrumental, Clean, Alternate, Stems, WAV Master

Deliverable types	Examples
Mix variants	Acapella, No Drums, Underscore
Cutdowns	60 sec, 30 sec, 15 sec, Sting

NOTE: Three-state meaning
No deliverable row means “not answered/unknown.” Available = No means explicitly unavailable. Available = Yes means the organization indicates it can supply that item. This distinction is important for readiness and client requests.

18. Pitch Readiness

Pitch Readiness is a rule-based quality-control layer. It inspects the track’s operational data and produces a score plus blocking issues and warnings. Warnings can reduce the score without necessarily preventing a track from being Pitch Ready; blockers prevent readiness.

Common readiness inputs

- Rights record and control information
- Master and publishing confirmation
- Writer/publisher information and splits
- Samples/interpolations/third-party approvals
- Restrictions and one-stop context
- Required audio/deliverable availability
- Other configured catalog completeness checks

How it affects pitches

A pitch can be marked Ready only when it contains at least one track and every selected track passes Pitch Readiness. If a track is added or removed from a Ready pitch, the pitch is returned to Draft so readiness can be reviewed again. Public Pitch Room audio is served only for pitch-ready tracks.

NOTE: Not legal advice
A green readiness state means the configured data rules are satisfied. It is not a legal opinion and does not replace contract review or clearance confirmation.

19. Track Comments and Mentions

On plans with Team & Collaboration, track records can include internal discussion threads. This keeps catalog questions close to the track instead of scattering them across email.

1. Open a track and locate Comments.

2. Add a top-level comment or reply in an existing thread.

3. Where the mention control is available, mention a teammate to draw attention to the comment.

4. Mentions can create a team notification for the mentioned user.

5. Edit or delete comments according to the permissions shown for your account.

NOTE: Scope
The current implemented comment routes are track-focused. Use Direct Messages for broader private team communication and use contextual message attachments when discussing pitches, submissions, clients or projects.

PART III

Public Catalog & Intake

20. Public Catalog

The public catalog is the client-facing discovery experience. It uses the same underlying catalog data but exposes only tracks with status Sync Ready.

Public search and filters

- Free-text search across track title, album, artist names and tag names
- Vocal type
- Tempo class
- Instrumental availability
- Content rating (clean/explicit)
- Genre
- Mood
- Scene / Use
- Lyrical Theme

Public track pages

A public track page can present the public-facing artist relationship, tags, Main recording preview and selected rights/deliverable/version context. The Main version is the normal public preview source when an eligible audio file exists.

Public artist pages

Public artist pages collect eligible Sync Ready tracks associated with that artist.

NOTE: Public vs. private audio
The public preview route is intentionally separate from authenticated catalog audio. Disabling public catalog access blocks the public browse/artist/track/preview experience without deleting the private files or internal track records.

21. Settings → Public Access

Owners and Administrators can independently control public catalog exposure and public submissions from one settings screen.

Switch	When ON	When OFF
Public Catalog	Public browse, artist pages, track pages and public preview audio are available for eligible content.	Those public catalog endpoints return not found; the internal workspace remains available.
Public Submissions	The organization accepts new artist/submitter submissions through the submission workflow.	New submissions are closed; existing submission records remain intact.

1. Open Settings → Public Access.

2. Choose the desired state for Public Catalog and Public Submissions.

3. Save Public Access.

4. Verify the public experience in a separate signed-out/incognito browser when changing exposure.

NOTE: Backend-only mode
To use SyncCatalog as a private backend, turn Public Catalog OFF. Catalog management, rights, CRM, pitches, private Pitch Rooms, team tools and internal workflows continue to function. Public Submissions can remain ON or be turned OFF independently.

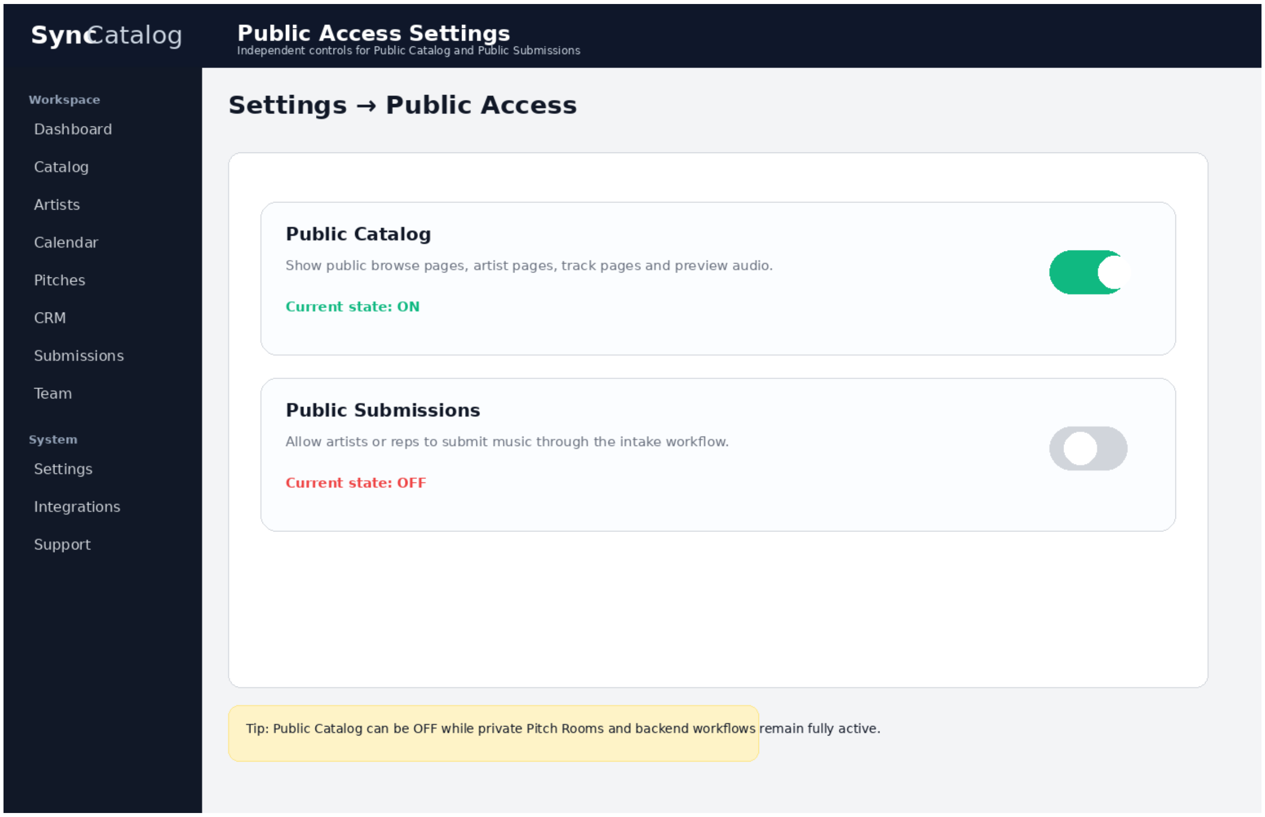

Figure 5. Public Access settings page with independent Public Catalog and Public Submissions switches.

22. Public License Requests

A public track can provide a licensing inquiry form. A submitted inquiry becomes an internal License Request associated with the organization and track.

Information a request can capture

- Requester name, email and company
- Project name
- Use type
- Usage description
- Territory
- License term
- Budget range
- Deadline
- Message
- Track and, when applicable, track version

Use types

The current request workflow recognizes Film, Television, Trailer, Advertising, Game, Web/Social, Podcast and Other use categories.

NOTE: Inquiry, not license
Submitting a request does not create a license or guarantee availability. The internal licensing team must review rights, usage, fee, term, territory, approvals and delivery requirements.

23. Submitter Registration and Artist Workspace

Music submitters use their own account flow rather than becoming internal staff members.

1. Choose Register from the public sign-in/artist flow.

2. Create the submitter account with display name, email and a password that meets the on-screen requirement.

3. Sign in and open the Artist Submit workspace.

4. Review and accept the submission guidelines/terms before the form will accept music.

5. Use My Submissions to review the submitter's own submitted items and statuses.

NOTE: Isolation
Submitter authentication does not grant access to the internal Dashboard, Catalog, CRM, Team or other staff-only organization data.

24. Creating a Music Submission

The submission form is designed to collect enough creative and rights context to make later review and catalog import useful.

Submission contact fields

- Submitter name and email
- Phone (optional)
- Company (optional)
- Message / notes
- Source

Track and music fields

- Title and artist name
- Album and release year
- Lyrics and explicit flag
- Vocal type and tempo class
- BPM and musical key
- ISRC
- Genre, mood, scene/use and lyrical theme
- Uploaded MP3 and/or supported listening reference where available

Rights and deliverables

- Master owner and publishing owner
- Control percentages
- One-stop indicator
- Samples/interpolations/third-party approval information
- Restrictions
- Writers and splits
- Publishers and splits
- Deliverable availability

25. Internal Submission Review

Internal reviewers see submissions in a dedicated inbox rather than mixed into the active catalog. Review permission is granted to Owner, Admin, Catalog Manager and Reviewer roles.

Submission statuses

Status	Suggested operational meaning
New	Received and not yet reviewed.
Listening	Currently under review/listening.
Shortlisted	Promising; retained for further consideration.
Accepted	Approved for the next internal step; eligible for catalog import by authorized roles.
Declined	Not being accepted into the represented catalog/workflow.

1. Open Submissions and select a submission.

2. Listen to the submitted audio through the protected submission player.

3. Review contact, creative metadata, rights, writers/publishers and deliverables.

4. Update the submission status as the review progresses.

5. If Accepted, an Owner/Admin/Catalog Manager can add the track to the Catalog. Reviewer can review/status submissions but cannot import them.

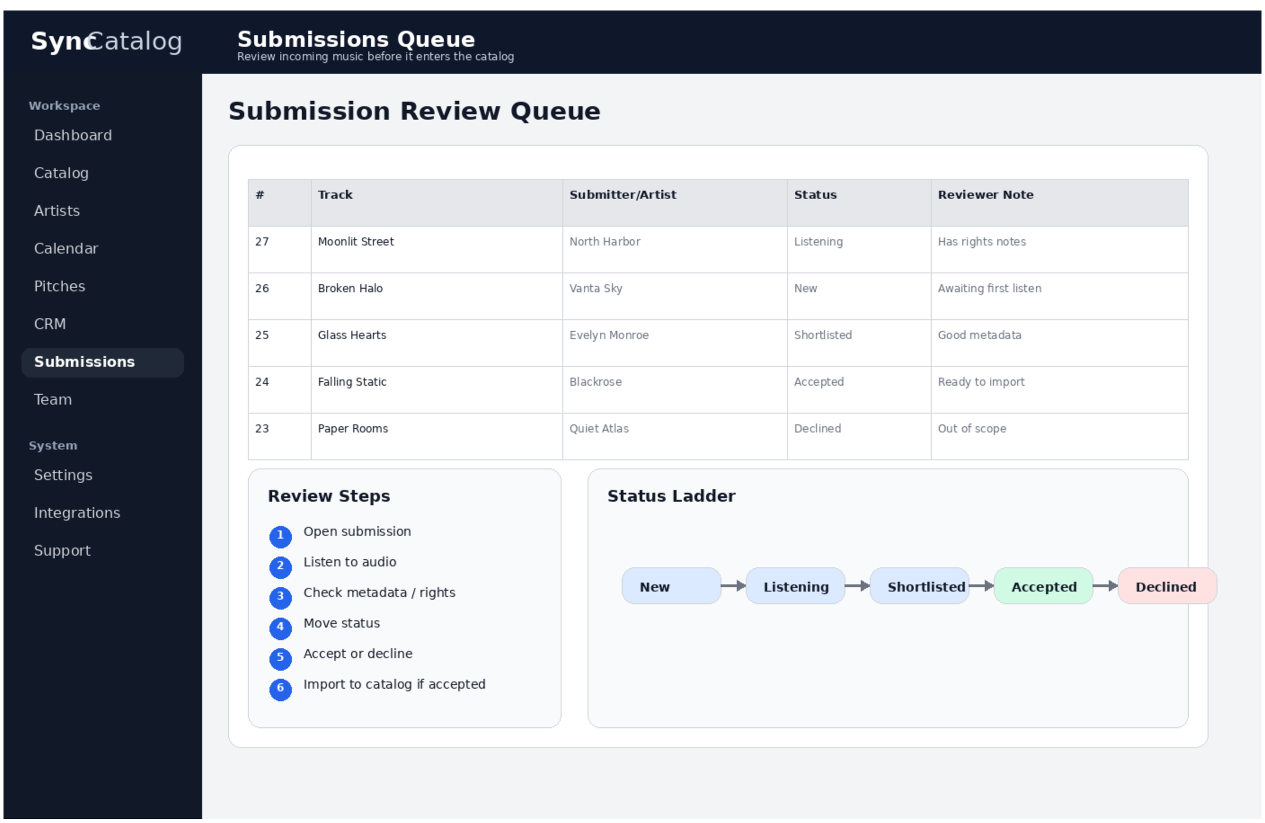

Figure 6. Submissions queue with review statuses, review steps, and the submission status ladder.

26. Importing an Accepted Submission to the Catalog

Accepted submissions can become Draft catalog tracks without retyping the entire record.

1. Open an Accepted submission.

2. For an accepted unimported track, choose Add to Catalog.

3. SyncCatalog enforces the organization track limit and uses a transaction so partial imports do not leave inconsistent records.

4. The system reuses or creates the artist, creates a Draft track, copies supplied rights/writer/publisher/deliverable/tag data, creates a Main version, copies the submitted MP3 into normal catalog storage, and preserves the original submission file.

5. The submission track is linked to the new catalog track only after the import succeeds.

6. Open the resulting catalog track and verify all imported information before changing status or pitching.

NOTE: Clearance confirmation is not inherited blindly
Imported rights data is a starting record. The workflow does not treat submission claims as automatic legal clearance; master/publishing confirmation must be reviewed by the catalog team.

PART IV

Pitches & Client Portal

27. Pitch Management

A Pitch is an internal package of selected tracks prepared for a recipient or opportunity. Owner, Admin, Catalog Manager and Sales roles can manage pitches.

Pitch fields

- Title
- Project name
- Recipient name, email and company
- CRM client and project links
- Notes
- Status
- Expiration date for the shared room when used

Pitch statuses

Status	Purpose
Draft	Working selection; tracks or details can still change.
Ready	All selected tracks pass Pitch Readiness and the package is approved for recipient use.
Sent	Pitch has been sent/treated as delivered to the recipient.
Closed	Opportunity/pitch is no longer active.
Archived	Retained historically outside the active workflow.

Create a pitch

1. Open Pitches → Create Pitch.

2. Enter recipient/opportunity information and link a CRM Client/Project if appropriate.

3. Save the pitch as Draft.

4. Add catalog tracks. The pitch screen calculates readiness for each track, ready/blocked counts and average score.

5. Resolve blockers on the underlying catalog tracks.

6. When every selected track is pitch-ready and at least one track is included, mark the pitch Ready.

NOTE: Track changes reset readiness
If a Ready pitch is changed by adding or removing a track, SyncCatalog returns it to Draft so the package can be reviewed again.

28. Internal Pitch Preview and Share Link

Before sending a pitch, staff can preview the recipient experience without relying on the public catalog.

1. Open a pitch and choose Preview Pitch Room.

2. Verify recipient-facing title, selected tracks, audio and metadata.

3. Generate a Share Link when the pitch is ready. SyncCatalog uses a long random token rather than an incremental public ID.

4. Copy/send the secure Pitch Room link to the intended recipient.

5. Revoke the share link when access should end; revocation invalidates the public token.

NOTE: Pitch Room availability
The public Pitch Room accepts only active tokenized pitches in Ready or Sent status and rejects expired links. It is marked noindex/noarchive to discourage search-engine indexing.

29. Recipient Pitch Room

The Pitch Room is a private, browser-based client portal for the tracks selected into one pitch. It does not require the recipient to hold an internal SyncCatalog account.

Recipient capabilities

- Open the token-secured room
- View the selected pitch tracks and relevant presentation metadata
- Play authorized Main-version audio
- Submit supported activity signals as the room is used
- Request materials from the licensing team
- Download only files that staff explicitly approve and deliver through the Approved Deliveries workflow

NOTE: Playback security
Pitch Room audio must belong to the same organization, belong to a Main version, belong to a track actually in that pitch, and pass Pitch Readiness. Unauthorized file IDs return not found rather than exposing neighboring files.

Client-facing/generated pages display “Powered by SyncCatalog,” with SyncCatalog linking back to synccatalog.com in the current branded build.

30. Recipient Activity

The Client Portal records supported recipient activity so staff can see engagement associated with the pitch. This can include room views, audio/play events and delivery interactions when those events are tracked by the current UI.

How staff use activity

1. Open the Pitch detail workspace.

2. Review the recipient/client-activity area.

3. Use timestamps and event context to understand what was interacted with.

4. Treat activity as operational context, not proof of commercial intent. Follow up using normal client communication and CRM tasks.

31. Material Requests

A recipient can ask for additional materials from the Pitch Room. Requests stay attached to the pitch so the licensing team does not have to reconstruct the request from email.

Material request statuses

Status	Meaning
New	Request has been received.
Reviewing	Team is checking rights/files or preparing a response.
Fulfilled	Requested material has been supplied/handled.
Declined	Request will not be fulfilled.

Request information

The request workflow can store requester identity/company, project, use type, usage description, territory, term, budget, deadline and message. Requests are validated against the pitch so a recipient cannot request material for an unrelated track.

1. Recipient submits a request in the Pitch Room.

2. Staff opens the Pitch and reviews the new material request.

3. Staff changes the status to Reviewing while checking rights/availability.

4. If approved, use Approved Deliveries to attach the exact file that may be downloaded.

5. Mark the request Fulfilled when complete, or Declined when it cannot be supplied.

32. Approved Deliveries

Approved Deliveries solves a key security problem: a recipient can download an exact file approved for the pitch without being given broad access to private catalog storage.

1. Open the material request on the internal Pitch workspace.

2. Choose the exact file to deliver through the approved-delivery action.

3. Set or accept the delivery expiration controls shown by the system.

4. Save the delivery. The Pitch Room receives a protected download link tied to that pitch/request/delivery.

5. Recipient downloads are counted/logged as supported activity.

6. Revoke the delivery if access should end before normal expiry.

NOTE: No general download permission
Pitch Room recipients do not receive a generic “download the catalog” capability. Only an explicitly approved delivery record makes the selected file downloadable, and the link can expire or be revoked.

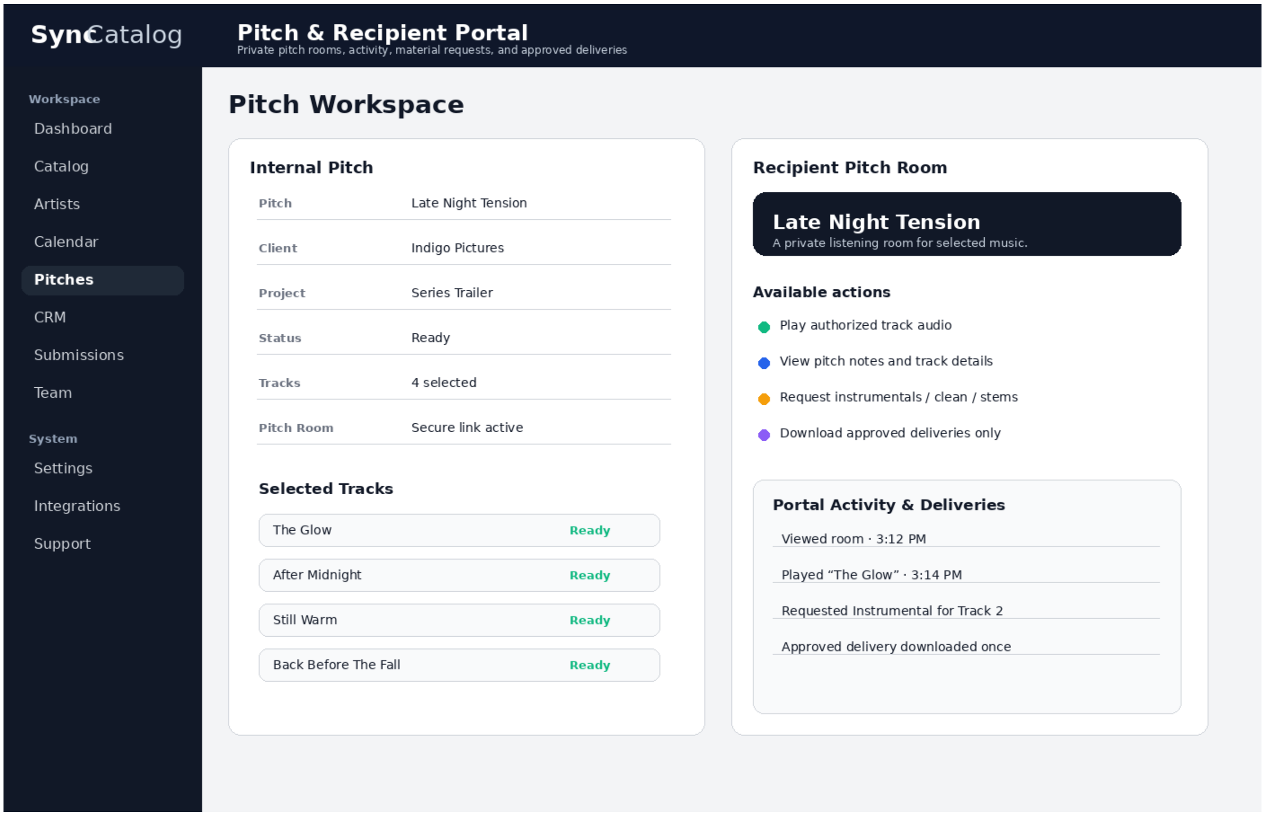

Figure 7. Internal Pitch workspace alongside the recipient-facing Pitch Room and its actions.

33. License Requests

License Requests are the internal work queue for public licensing inquiries. Owner, Admin and Sales roles can manage this area.

License-request statuses

Status	Typical stage
New	Inquiry received.
Contacted	Team has responded or opened direct communication.
Quoted	Pricing/terms have been quoted.
Licensed	Request has resulted in a completed license according to company process.
Declined	Request will not be licensed.
Closed	Request closed without another active status.

Working a request

1. Open License Requests and select the inquiry.

2. Review requester, track, use type, territory, term, budget, deadline and message.

3. Link the request to a CRM Client and Project when appropriate.

4. Assign/follow up using the responsible team workflow.

5. Update status as the conversation progresses.

6. Before treating the request as licensed, verify actual rights and commercial approval outside any mere status label.

34. License Deadlines and Reminders

License Request deadlines participate in the follow-up system. The current scheduled reminder command checks requests and can notify users with licensing-management capability at 7, 3 and 1 days before the deadline.

- Eligible recipients are users who can manage licensing (Owner, Admin, Sales).
- Dedupe logic prevents the same reminder window from repeatedly creating identical notifications.
- Opening a supported deadline notification takes the user back to the related request.
- The production scheduler runs the reminder task on its configured recurring schedule.

PART V

CRM & Work Management

35. CRM Overview

The CRM area connects companies and people to projects, pitches, licensing requests and follow-up work. It is available to Owner, Admin and Sales roles through the manage_crm capability.

The intended chain is Client → Contact → Project → Pitch / License Request → Task / Calendar follow-up. Records can also exist with optional links when an opportunity is not yet fully structured.

36. Clients

Client statuses

Status	Meaning
Prospect	Potential client/relationship not yet active.
Active	Current working client/relationship.
Inactive	Retained record that should generally be excluded from new active-project choices.

Client fields

- Name
- Status
- Website
- Notes

Client list

The Clients list supports search and status filtering. It shows client-level counts such as contacts and projects, plus summary statistics for total, prospects and active clients.

Client detail workspace

The client detail page combines contacts, projects, open tasks, recent pitches and linked license requests so the relationship can be reviewed from one place.

37. Client Contacts

Contacts represent individuals within a client/company record.

Field	Use
Name	Contact identity.
Title	Role/job title.
Email	Email address.

Field	Use
Phone	Phone number.
Primary	Marks the preferred primary contact.
Notes	Relationship/context notes.

NOTE: Primary contact behavior
Setting a contact as Primary clears the primary flag from other contacts for the same client so one client has a single primary contact in the current workflow.

1. Open a Client.

2. Choose Add Contact.

3. Enter name and any available role/email/phone information.

4. Mark Primary when this is the principal contact for the client.

5. Save; the contact appears in the client workspace.

38. Projects

Projects organize licensing work for a production, campaign or opportunity and can be linked to a Client.

Project types

Film, Television, Trailer, Advertising, Game, Web/Social, Podcast and Other.

Project statuses

Open, Active, On Hold, Completed and Cancelled.

Project fields

- Project name
- Client (optional)
- Project type
- Status
- Brief
- Deadline
- Budget minimum and maximum
- 3-character currency code
- Notes
- Team members where assigned

Project workspace

A Project detail page can show overview/brief information alongside linked tasks, pitches and license requests. New pitches can be created with the project relationship preselected, keeping downstream work connected.

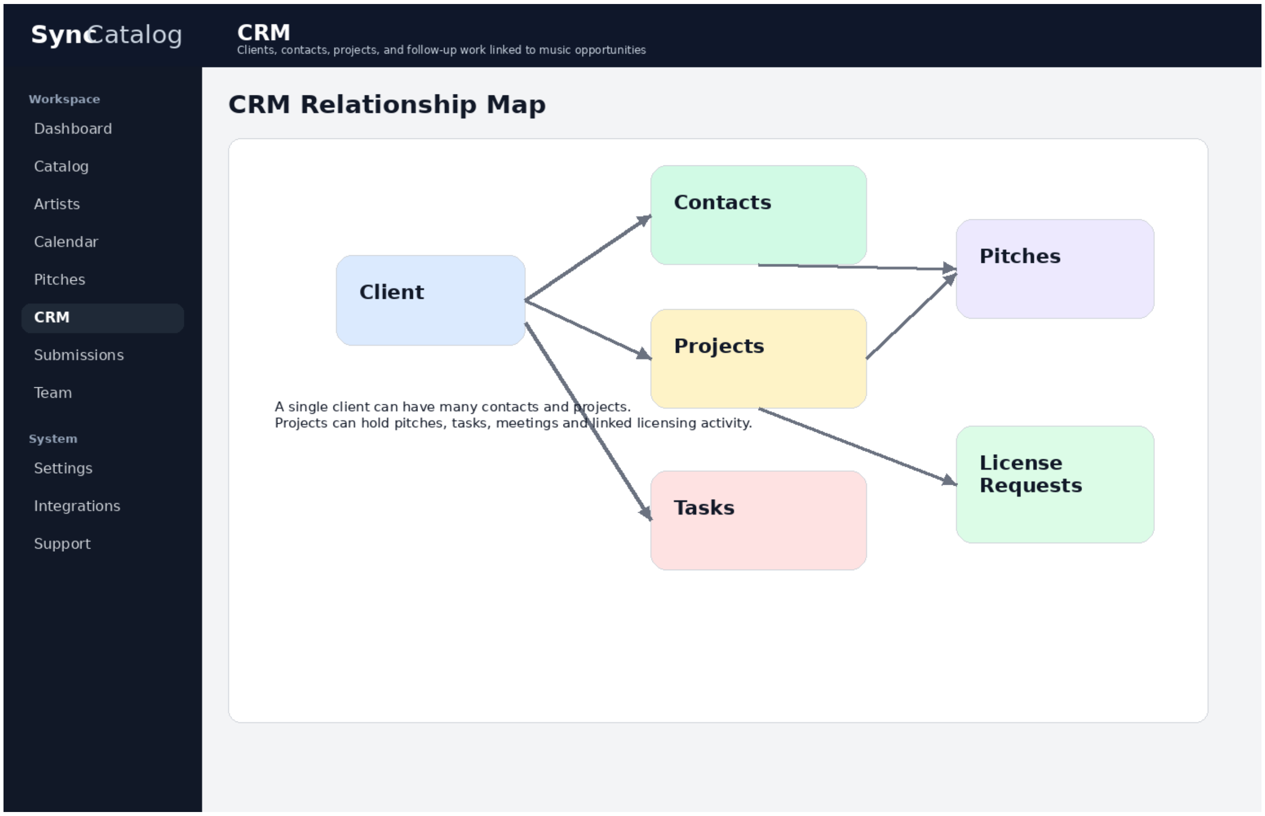

Figure 8. CRM relationship map linking clients, contacts, projects, pitches, tasks, and license requests.

39. Tasks & Follow-ups

Tasks are CRM work items that can be linked to a client, a project, an assigned team member, or combinations of those relationships.

Task statuses and priorities

Type	Values
Status	Open, In Progress, Completed, Cancelled
Priority	Low, Normal, High, Urgent

Task fields

- Title
- Description
- Status
- Priority
- Client link
- Project link
- Assigned user
- Due date/time

Task list behavior

- Search by task/client/project context
- Filter by status and priority
- Summary counts for Open, Overdue and Due Next 7 Days

- Overdue highlighting for incomplete tasks past their due time
- Complete action for active tasks
- Reopen action for completed tasks

1. Create a task from Tasks or from a linked Client/Project.

2. Assign a responsible user when appropriate.

3. Set priority and due date/time.

4. Use Complete when finished; use Reopen if work becomes active again.

5. Keep Cancelled for work that should remain in history but is no longer required.

40. Calendar

Calendar provides a time-based view for meetings, deadlines, follow-ups, tasks and other events. The organization/user timezone setting prevents teams from silently interpreting dates in the wrong timezone.

Calendar event types

Meeting, Deadline, Follow-up, Task and Other.

Calendar statuses

Scheduled, Completed and Cancelled.

Event fields

- Title
- Event type
- Status
- Date
- Start/end time or all-day state
- Timezone
- Assigned user
- Location
- Notes
- Optional contextual link to another record
- Optional linked video meeting

1. Open Calendar and choose Create Event.

2. Enter the title and select the event type.

3. Choose all-day or enter start/end times in the appropriate timezone.

4. Assign a team member and add location/notes if needed.

5. Save. Edit the event later as details change.

6. Use Cancel rather than deleting when the cancelled event should remain part of the work history.

Organization timezone

Authorized users can update the Calendar timezone setting. Date/time presentation and scheduling should be reviewed after changing the organization timezone.

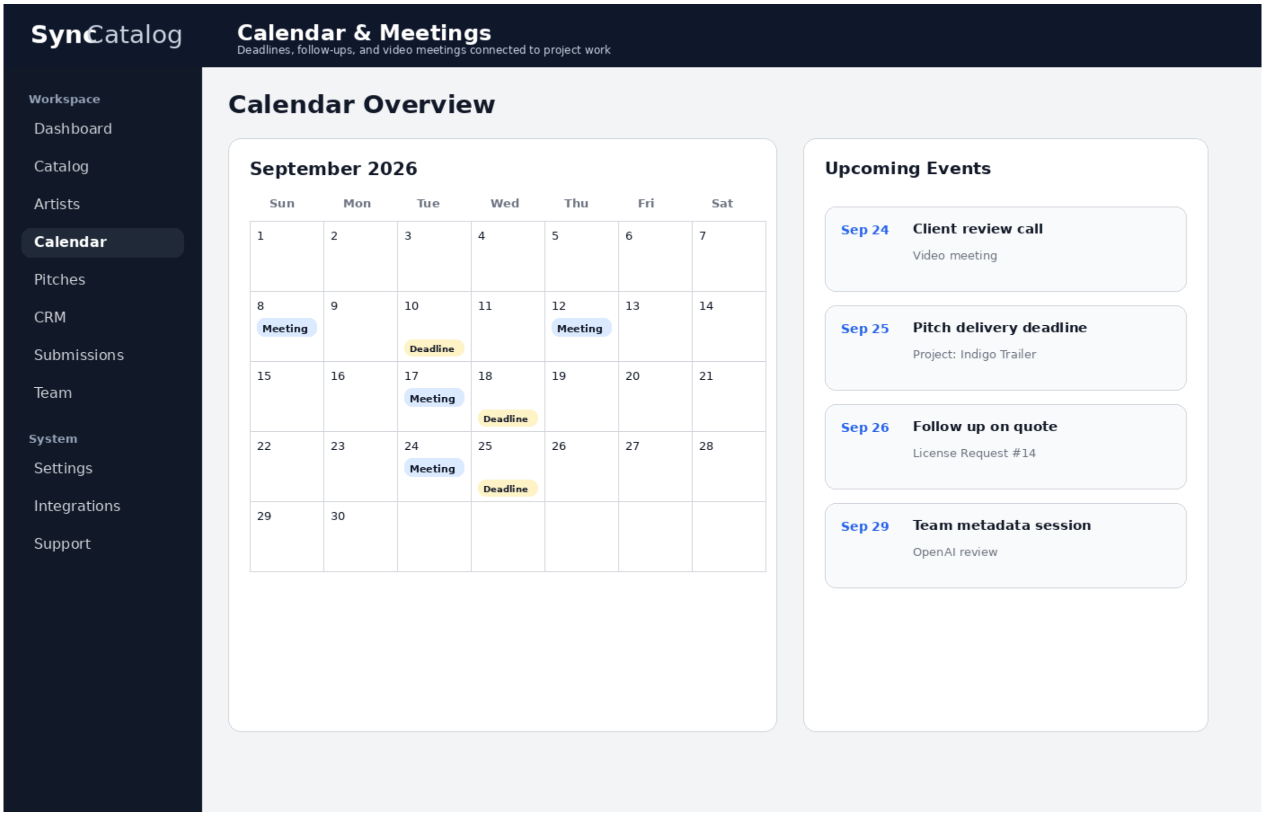

Figure 9. Calendar workspace showing meetings, deadlines, and event detail cards.

41. Calendar Video Meetings

When a supported video provider is connected, a Calendar event can start a video meeting from the event workflow. The resulting video_meeting record links back to the calendar event so the meeting and schedule stay connected.

1. Create or open a Calendar event.

2. Use Start Video Meeting when available.

3. SyncCatalog asks the connected provider to create the external room and stores the meeting reference, public guest token, start time and expiration.

4. Open the meeting from SyncCatalog or share the guest entry link as appropriate.

5. End the meeting when finished.

PART VI

Team & Collaboration

42. Team Workspace

Member management and full collaboration are separate plan concepts. Starter supports up to two internal users and Owner/Admin member management. The full Team & Collaboration suite begins with Professional and includes the collaboration-oriented roster/activity experience, comments and mentions, Direct Messages, and other eligible team workflows. Business supports up to 15 internal users; Enterprise seat capacity is custom.

Team roles

- Owner
- Admin
- Catalog Manager
- Sales
- Reviewer

Seat usage

The Team screen shows current usage relative to plan limits. Pending invitations count against finite seat limits. If the seat limit is reached, adding a member or creating another invitation is blocked until capacity is available.

43. Adding a Team Member Directly

1. Open Team.

2. In Add Member Directly, enter the person's email, optional display name and role.

3. If the email does not yet belong to a SyncCatalog account, supply and confirm a temporary password that meets the current policy.

4. Submit. SyncCatalog rejects inactive existing accounts and duplicate membership.

5. For a newly created account, give the user the temporary credentials securely. The account is forced to change the password on first use.

> **NOTE: Existing SyncCatalog users**
> If the email already belongs to an active account, SyncCatalog can attach that account to the organization without creating a second login. The new organization role still controls what the user may do in this workspace.

44. Invitations

Invitations are the preferred workflow when the invited person should create/confirm their own account credentials.

1. Open Team → Invite Member.

2. Enter the email and select Admin, Catalog Manager, Sales or Reviewer. Owner is not a normal invite target.

3. Create the invitation.

4. If outbound invitation email is not configured, copy the secure invitation link shown by SyncCatalog and send it directly to the recipient.

5. The invitation expires after 7 days in the current workflow.

6. The recipient opens the link, signs in or creates the required account credentials, then accepts the invitation.

7. Revoke a pending invitation from Team if it should no longer be usable.

Role changes and removals

Owner/Admin can change ordinary member roles and remove members, subject to owner-protection rules. Admin cannot alter/remove owners; an owner cannot demote the organization's final owner.

45. Team Activity

Team Activity is an organization-scoped audit-style feed for supported product actions. It helps answer "what changed?" without requiring users to open every record.

1. Open Team → Activity.

2. Review the newest supported events, actor and subject context.

3. Use the activity message/context to return to the related workflow when applicable.

4. Treat the feed as operational history rather than a replacement for formal legal/contract records.

The Activity page currently limits the displayed feed to a recent working set (approximately the latest 100 records in the implemented controller).

46. Notifications

Team notifications are personal to the signed-in user. The navigation can display an unread-count badge.

Notification list behavior

- Unread items sort ahead of read items, then newest first.
- The current list loads up to 200 notifications.
- Open marks the notification read and routes to the related record when that target type is supported.
- Mark All Read clears the unread state for the user's organization notifications.
- Mention notifications and licensing-deadline reminders are examples of supported notification sources.

47. Direct Messages

Direct Messaging V1 is a Team & Collaboration feature for private same-organization conversations. It is intentionally isolated by tenant and participant membership.

Full inbox

- Messages inbox
- Start New Message
- Open a conversation
- Send a reply
- Unread/read state
- Duplicate one-to-one conversation prevention

Security behavior

- Only active members of the same organization can participate.
- A nonparticipant or cross-tenant user receives not found rather than another team's conversation.
- Messaging is plan-gated with Team & Collaboration.
- Demo/read-only restrictions prevent unauthorized mutation.

Floating messenger

A bottom-right messenger is available across the main application in the current UI. It shows an unread badge, lets a user open the inbox, start a message and reply inside the panel, refreshes conversation state periodically (about every 12 seconds), and provides a link to the full inbox.

48. Contextual Messaging

A Direct Message can carry a structured reference to a SyncCatalog record instead of forcing users to paste ambiguous IDs or URLs.

Supported context types

- Track
- Pitch
- Submission
- Client
- Project

SyncCatalog validates that the referenced record belongs to the same organization before attaching it. The conversation displays a structured clickable context card so the recipient can open the correct record when their role allows access.

NOTE: Permission still applies
A message context card does not grant new authorization. If the recipient’s role cannot access the referenced area, normal role/tenant controls still apply.

PART VII

Integrations & Meetings

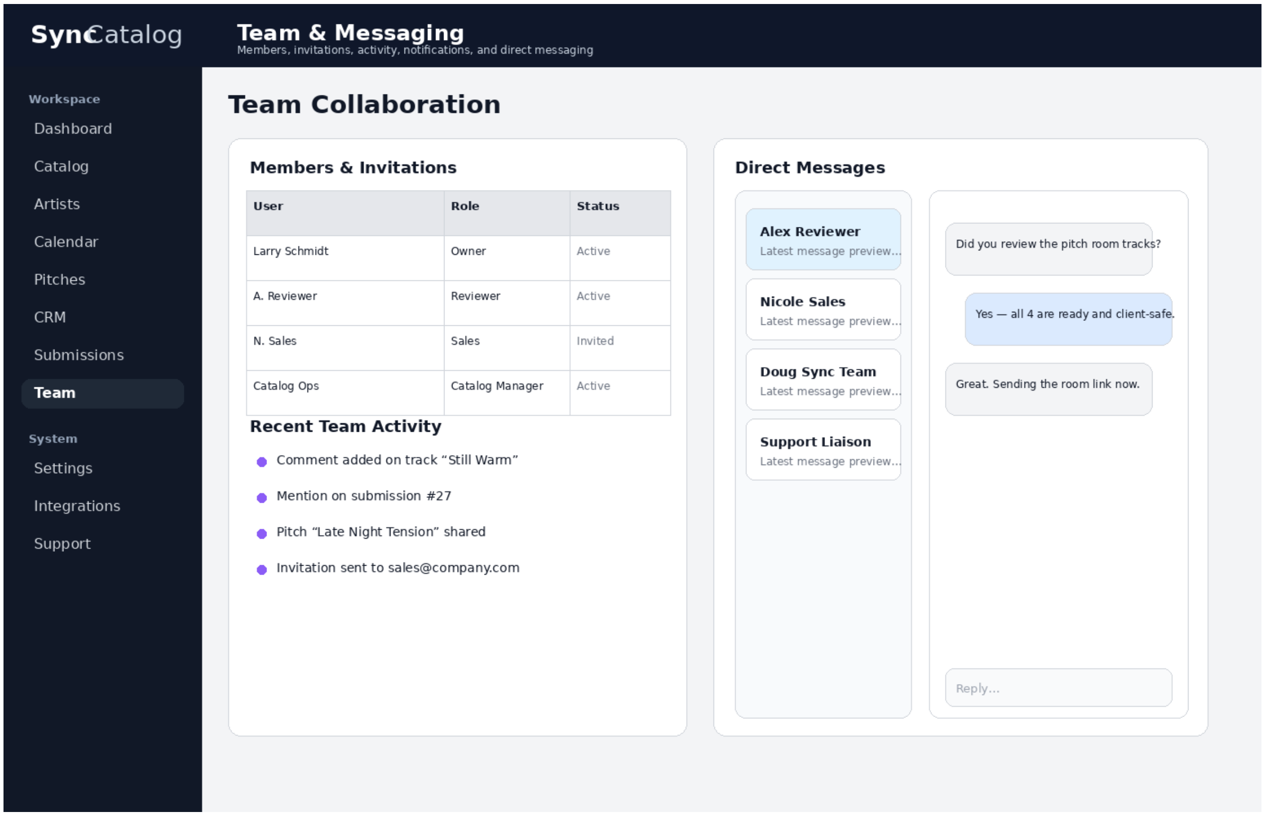

Figure 10. Team collaboration view with members, activity, and the Direct Messages interface.

49. Settings → Integrations

Integrations are organization-level configurations managed by Owner/Admin. Starter can connect OpenAI specifically for its customer-work AI features. Professional, Business and Enterprise can use the broader external-integrations package when the corresponding provider workflow is supported. Each provider card stores non-secret configuration separately from encrypted credentials.

Common actions

1. Open Settings → Integrations.

2. Expand the provider.

3. Enter required configuration fields and credentials.

4. Enable the integration and Save/Connect.

5. For providers with a live tester, run Test Connection and confirm Connected status.

6. To rotate a secret, enter the replacement value. Leaving an existing secret field blank keeps the stored credential.

7. Disconnect/remove the provider when the organization should no longer use it.

NOTE: Credential handling
Integration credentials are encrypted as a server-side array and are not sent back to the browser for display. The UI shows only whether credentials are stored. Raw provider responses are not retained as diagnostic dumps.

50. Integration Provider Reference

Provider	Registry category	Current build behavior
OpenAI	AI	ACTIVE customer-work AI adapter. Starter+: single-track metadata; Professional+: contextual Ask SyncCatalog; Business+: bulk AI. Connection tester implemented.
Anthropic	AI	Registered future AI provider. Not currently an active or customer-available SyncCatalog AI engine.
Google Gemini	AI	Registered future AI provider. Not currently an active or customer-available SyncCatalog AI engine.
Daily	Video	ACTIVE video-meeting adapter on eligible collaboration plans. Connection tester implemented.
Twilio Video	Video	Configuration/provider registry entry; current meeting provider manager uses Daily, not Twilio.
Company SMTP	Email	Configuration slot is present for company mail settings; no active connection tester in the current tester service.
S3-Compatible Storage	Storage	Configuration slot supports endpoint/region/bucket/access credentials; no active connection tester in the current tester service.

NOTE: Why this matters
A provider registry entry does not by itself mean the provider is a supported live workflow. OpenAI and Daily are the two verified active adapters described here. Anthropic and Google Gemini remain future AI-provider registrations and are not current alternatives for customer-work AI.

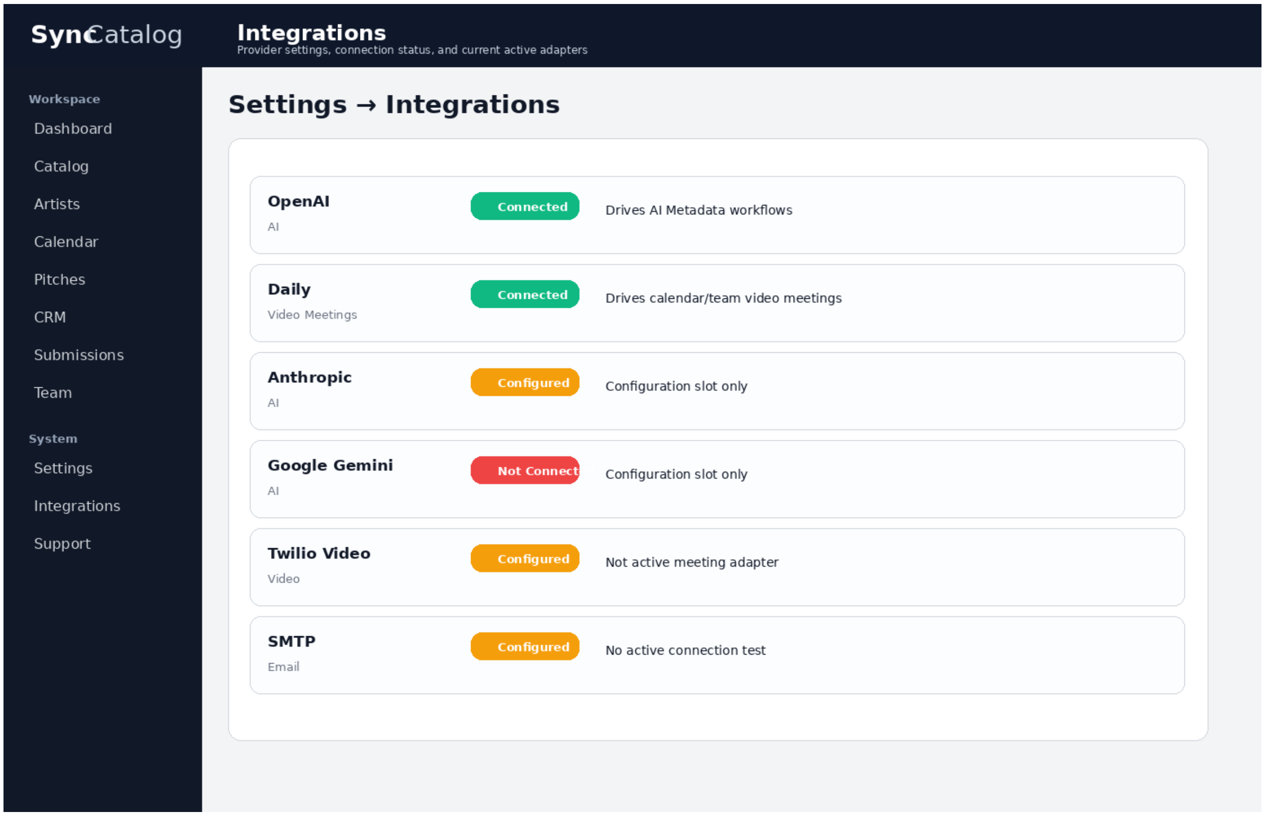

Figure 11. Integrations screen showing active adapters versus configuration-only providers.

51. OpenAI Integration

OpenAI configuration includes an API key and optional default model. After enabling it, use Test Connection. SyncCatalog validates the credential against OpenAI; errors are sanitized so credential details are not exposed. The credential is organization-scoped, encrypted at rest and used server-side only.

1. Add the OpenAI API key.

2. Optionally enter a default model if your deployment calls for one.

3. Enable the integration.

4. Save and Test Connection.

5. Once status is Connected, use the AI workflows included with the organization’s plan: single-track metadata on Starter+, contextual Ask SyncCatalog on Professional+, and bulk AI on Business+.

Customer-work AI requests are made through the organization’s connected OpenAI account, so provider usage is billed by OpenAI. General Ask SyncCatalog product help is different: it uses SyncCatalog’s platform-managed support AI and does not require the customer to supply an OpenAI key. Context-aware customer-record AI never silently falls back to the platform credential when the organization has not connected OpenAI.

52. Daily Video Meetings

Daily is the active video-meeting provider in the current build. Team meetings require an enabled, successfully tested Daily integration.

1. Configure the Daily API key under Integrations; optionally enter the Daily domain.

2. Enable and Test Connection.

3. From Team, start a meeting and optionally enter a title. A blank title defaults to “Team Meeting.”

4. SyncCatalog creates the provider room, stores an active meeting record and generates a random public guest token.

5. Open the internal meeting screen.

6. Share the guest link when an outside participant should join without an internal account.

7. End the meeting from SyncCatalog when finished.

Guest join

A guest uses the tokenized guest page, supplies a guest name, and receives a provider join token for that room. The public token is independent of the external provider room name, and expired/ended meetings are not treated as permanent public pages.

PART VIII

Support, Demo & Administration

53. Help & Support Tickets

Help & Support lets a signed-in customer create and maintain a support conversation with SyncCatalog staff.

Create a ticket

1. Open Help & Support.

2. Choose New Support Ticket.

3. Enter a subject and describe the issue.

4. Submit. SyncCatalog creates a reference in the form SC-###### and stores the first message as a customer message.

5. Open the ticket later to read public support replies and add another reply.

NOTE: Ticket privacy
Customer support tickets are private to the user who opened them, even from coworkers in the same organization. Another organization cannot open the ticket. Internal staff notes are never shown to the customer.

Platform support staff can manage ticket status, priority, assignment, public replies and private/internal notes through the separate staff inbox.

54. Knowledge and AI-Assisted Support

NOTE: Deployment note
Knowledge-base and AI-support presentation can vary by hosted deployment. The support-ticket workflow described in Chapter 53 is the core customer support path.

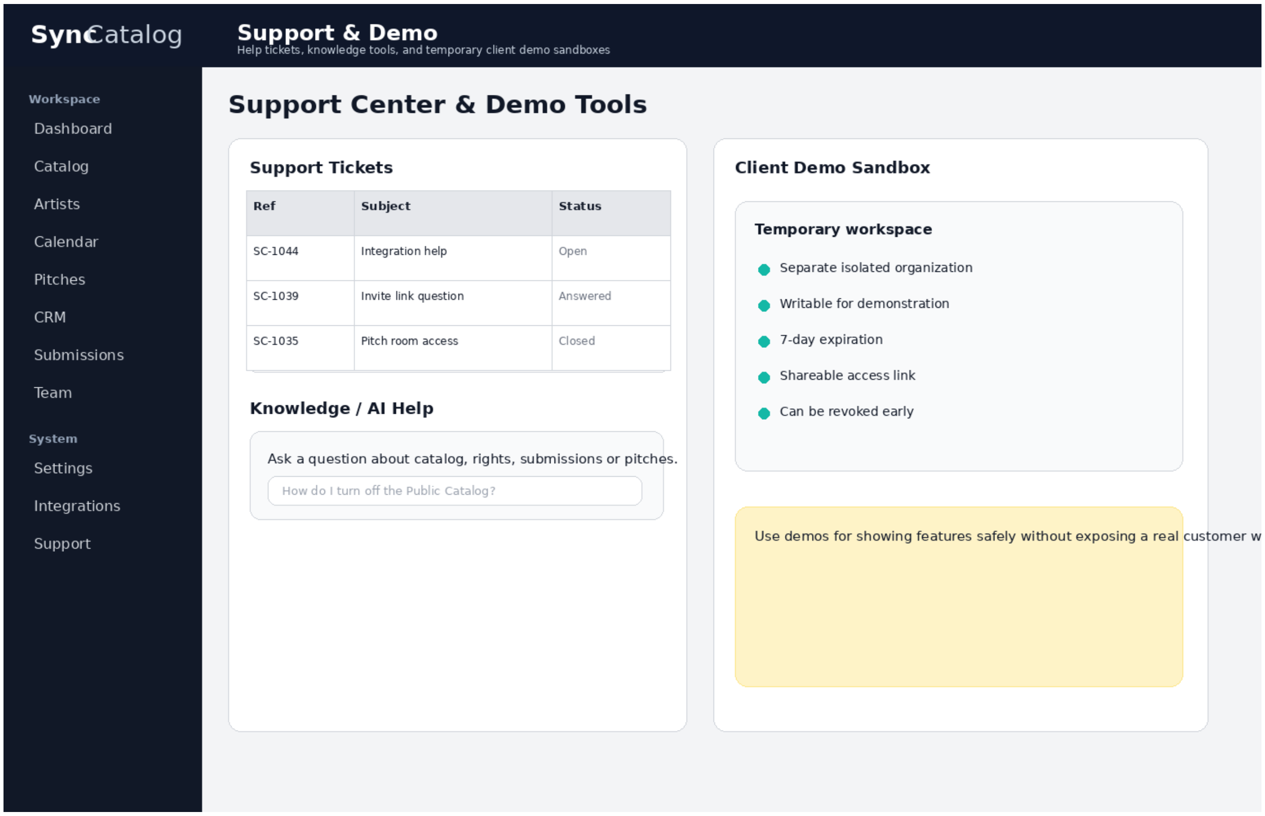

Figure 12. Support Center and client demo sandbox overview.

Ask SyncCatalog is the hosted product assistant for SyncCatalog. General product help is available on every plan and is grounded in published SyncCatalog knowledge using the platform-managed support AI. Professional, Business and Enterprise can also use limited server-generated context from supported authenticated record pages when the organization has connected OpenAI. The assistant is designed to explain product/workflow state and guide the user without making changes on the user's behalf.

Where Ask SyncCatalog appears

The same floating assistant interface is used across the public product site, Support Center and most signed-in SyncCatalog workspaces. Public/general pages use approved product knowledge. On supported record-detail pages, Professional-and-above organizations add sanitized current-record context only when customer OpenAI is ready; otherwise the assistant stays in general-help mode and an authorized Owner/Admin can be directed to connect OpenAI. Active demo sandboxes can demonstrate contextual behavior without an external provider.

Page-aware record context

On the following authenticated record pages, eligible contextual Ask SyncCatalog can answer questions about the record currently open in the workspace. The browser supplies only the record type and identifier; the server independently resolves the record inside the active organization before building the assistant context. Context-aware access is plan-gated and, for real customer organizations, requires a connected and successfully tested OpenAI integration.

Context	Sanitized information used	Typical questions
Track	Status, Pitch Readiness blockers/warnings, selected rights-state flags, versions and deliverable availability	"What would you fix first?" / "Do I need an instrumental?"
License Request	Status, track/version, project/use details, territory/term/budget range/deadline and linked CRM names	"Where are we with this request?"
Client	Status and counts/recent summaries for projects, tasks, pitches and license	"What's going on with this client?"

	requests	
Project	Status, type, deadline, linked client and related task/pitch/license-request counts	“Anything I should be paying attention to here?”
Pitch	Status, sharing state, selected-track readiness, material-request state, delivery count and recipient-activity counts	“Anything holding this pitch up?”
Submission	Status, submitted-track summary, basic rights-control state, writer/publisher/deliverable counts and catalog-import state	“What’s missing before I accept this?”

AI provider and plan behavior

- General product help (all plans): SyncCatalog uses its own platform-managed support AI. The customer does not need to enter an OpenAI key for ordinary product-help questions.
- Single-track metadata (Starter+): customer-work AI uses the organization’s connected OpenAI account.
- Context-aware record help (Professional+): customer-work AI uses the organization’s connected OpenAI account. If it is not connected, general help remains available and the contextual request is not sent through SyncCatalog’s platform credential.
- Bulk AI catalog analysis/review (Business+): customer-work AI uses the organization’s connected OpenAI account.
- Active client demo sandboxes: contextual AI and metadata AI can be simulated locally with deterministic demo responses; no external AI credential or provider request is required for the simulation.

Conversation behavior

Ask SyncCatalog is intentionally conversational. It can carry a short follow-up conversation, refer naturally to “this track,” “this pitch,” or “this client,” and prioritize actual blockers before warnings or nice-to-have work. Recent conversation turns are kept in browser session storage so follow-up questions make sense within the current browser tab/context.

Use New when you want to clear that contextual conversation and start over. Separate record contexts use separate browser-session conversation keys so a discussion about one record is not reused as the working conversation for another record.

Guided actions

When an answer points to a clear next place in SyncCatalog, the assistant can display a guided action button. These buttons are generated by SyncCatalog’s server-side action whitelist rather than by the AI model, so the model cannot invent arbitrary destinations or perform a hidden mutation.

- Track: Open Rights or Open Audio when the question/readiness issue points to those sections.
- Pitch: Review Blocked Track; Preview Pitch Room when a share is active.
- Client: Edit Client; Start Project.
- Project: Edit Project; Add Task.
- License Request: Open License Request.
- Submission: Open Submission.

Guided actions are navigation only. Ask SyncCatalog remains read-only in the current build.

Context isolation, privacy and safety

- The assistant does not receive direct database access. SyncCatalog builds a server-side context object and sends only the fields approved for that context.
- The server tenant-scopes every contextual lookup to the signed-in user’s active organization. A record identifier from another organization behaves like a nonexistent record.
- Sanitized context intentionally excludes unnecessary private material such as contact email addresses, free-form notes/briefs, file paths, public tokens, credentials and unrelated organization records unless a future documented workflow explicitly requires a field.
- Ask SyncCatalog is not a legal-clearance engine. It may explain what a field or readiness blocker says, but it does not independently determine ownership, contractual authority or legal clearance.
- Conversation text is not treated as authoritative product documentation. Published SyncCatalog knowledge and verified server context remain the grounding sources.

Browser-session conversation history is intended for continuity, not permanent recordkeeping. General-help requests are processed by SyncCatalog's hosted support AI; customer-record contextual requests for real organizations are processed through that organization's connected OpenAI account. Active demo sandbox simulation makes no external AI request. Do not enter passwords, API keys, payment-card data, authentication codes or other secrets into Ask SyncCatalog.

When the assistant cannot answer

Ask SyncCatalog is configured to answer only when the available product knowledge and/or verified record context support a useful response. If confidence is too low, the question is outside the documented product context, or the issue involves a billing dispute, security incident, data loss, account recovery, legal dispute or an apparent defect that the supplied knowledge does not resolve, the assistant should direct the user to human support instead of guessing.

Using Ask SyncCatalog

1. Open Ask SyncCatalog from the floating launcher or use it from the Support Center when available.

2. Ask the question naturally. On a supported record page, phrases such as "What would you fix first?" or "Anything holding this up?" can use current-page context when the plan and provider state allow it. If OpenAI is not connected, Ask SyncCatalog continues to answer general product-help questions.

3. Follow a server-approved guided action when one is shown, or continue with a follow-up question.

4. Use New to clear the current conversational thread when changing topics.

5. If the assistant escalates or the answer is insufficient, open Help & Support and create a ticket with the exact screen, action and error message.

Keep account secrets, API keys and passwords out of support conversations unless an approved secure channel specifically requests them.

55. Public Demonstration Mode

The SyncCatalog public demo uses a designated demo account and read-only middleware. It is meant for product evaluation without risking production data changes.

- GET/HEAD/OPTIONS browsing is allowed within the demo workspace.
- Write/mutation requests are blocked with a read-only message.
- The demo can be exited through the dedicated Exit Demo flow.
- Demo mode does not weaken normal tenant or role security for real users.

NOTE: Demo data
A demo environment may contain seeded or real demonstration catalog data depending on the current deployment. Treat it as product demonstration content, not as a customer's production workspace.

56. Client Demo Sandboxes

Owner/Admin users on the current hosted build can create isolated client demo sandboxes from the Team area when this feature is enabled. These are different from the public read-only demo: a client demo is intended to be a temporary writable evaluation workspace.

Client Demo workflow

1. Open Team → Client Demos.

2. Create a demo sandbox for the prospective client.

3. SyncCatalog clones/creates isolated demo workspace data and produces access information.

4. Use Copy Demo Link, Email/Open Email or the available sharing controls to send the demo to the intended evaluator.

5. The current client-demo lifecycle is seven days.

6. Revoke the sandbox early when access should end.

NOTE: Isolation
A client demo has its own sandbox access controls and should never be treated as a shortcut into a real customer organization. Demo middleware/tenant checks remain part of the protection model.

Demo AI behavior

Active client demo sandboxes do not require a prospect to provide an OpenAI API key. SyncCatalog uses its existing sandbox detector and a local deterministic simulator for contextual Ask SyncCatalog and demo metadata suggestions. No external AI request is made by that simulation, and the demo does not borrow a real customer credential or silently consume the production support AI credential for customer-record work.

57. Platform-Administrator Functions

The following functions are not ordinary customer permissions. They appear only to accounts marked as SyncCatalog platform administrators.

Support Inbox

- View customer support tickets
- Reply publicly
- Add internal staff notes
- Change ticket status and priority
- Assign support responsibility
- Keep internal messages hidden from customer views

Marketing / inquiry leads and demo administration

The platform includes administration pages for website contact/early-access inquiries where enabled. Platform administrators can review inquiry details and internal notes/status according to the current deployment. These records are separate from a customer organization’s CRM Clients. Platform and organization administrators may also have demo/sandbox controls depending on deployment; customer-facing users should not receive platform-admin status merely to use ordinary organization features.

PART IX

Security, Operations & Reference

58. Security Model

Tenant isolation

Organization data is scoped by organization_id throughout the application. Security tests explicitly verify that one tenant cannot view/update another tenant's tracks, stream its catalog/submission audio, alter submissions or license requests, view pitches, or add tracks to another tenant's pitch.

Role authorization

Role checks are enforced in controllers/services as well as reflected in navigation. Hiding a button is not the security boundary; unauthorized direct requests are rejected.

Active-user enforcement

Disabled users with an existing session are logged out/blocked by active-user middleware. Guest-accessible public routes continue to operate independently.

File validation

Catalog and bulk-import audio is inspected so a non-MP3 file disguised with an .mp3 extension is rejected. Files remain organization-scoped and protected routes verify ownership before streaming.

Public-token security

Pitch Rooms and guest meeting access use long random tokens. Pitch Room routes are throttled and tokenized rather than exposing sequential internal identifiers.

Integration secrets

Third-party credentials are encrypted using the application key and are never rendered back into settings pages. Use provider-side key rotation immediately if a credential may have been exposed.

AI assistant context isolation

Ask SyncCatalog follows the same tenant boundary as the rest of the authenticated workspace. For page-aware questions, the client sends only a context type and record ID. The server resolves the record inside the active organization and builds a sanitized read-only context before any provider routing occurs, so cross-organization identifiers return not found before integration state is disclosed. Real customer context is sent only through that organization's connected OpenAI account; active demo sandboxes use the local simulator.

The assistant cannot mutate tracks, rights, pitches, CRM records, submissions or license requests. Guided-action buttons are server-generated navigation targets; write operations continue to require the normal authenticated application routes, validation, roles and middleware.

59. Data Preservation and Backups (Hosted Operations)

SyncCatalog's hosted production environment is designed around recoverability. Production operations include recurring application/database backups and off-site backup capability. These are platform operations rather than customer-facing buttons, so customers should not attempt to manage server files directly unless they operate a self-hosted installation under a separate support agreement.

NOTE: Do not confuse backup with version history
A server backup is a disaster-recovery mechanism. It is not a substitute for careful status changes, rights documentation or maintaining contractual source records.

60. End-to-End Workflow: New Catalog Music

1. Add the track manually, bulk-import the MP3, or import an Accepted submission.

2. Confirm artist identity and core track fields.

3. Upload/verify Main audio and any useful alternate versions.

4. Complete sync metadata and controlled tags.

5. Use AI suggestions only as creative metadata assistance; accept/reject them deliberately.

6. Enter master/publishing ownership and control.

7. Add writers, publishers, PRO/IPI data and splits.

8. Answer sample/interpolation/third-party questions and record restrictions.

9. Mark available deliverables.

10. Resolve Pitch Readiness blockers.

11. Move to the organization’s chosen readiness status, including Sync Ready when appropriate.

12. Expose publicly only if Public Catalog is enabled and the track should be public.

61. End-to-End Workflow: Submission to Catalog

1. Submitter creates/signs into an artist account and accepts submission terms.

2. Submitter sends music, metadata and rights information.

3. Reviewer moves the submission through New → Listening → Shortlisted/Accepted/Declined as appropriate.

4. If Accepted, an Owner/Admin/Catalog Manager uses Add to Catalog.

5. The imported catalog track begins as Draft; the original submission is preserved.

6. Catalog staff verify rights and imported metadata, add/replace audio versions as needed, and complete readiness work.

7. Only after verification should the track be marked Catalog Ready/Sync Ready or used in pitches.

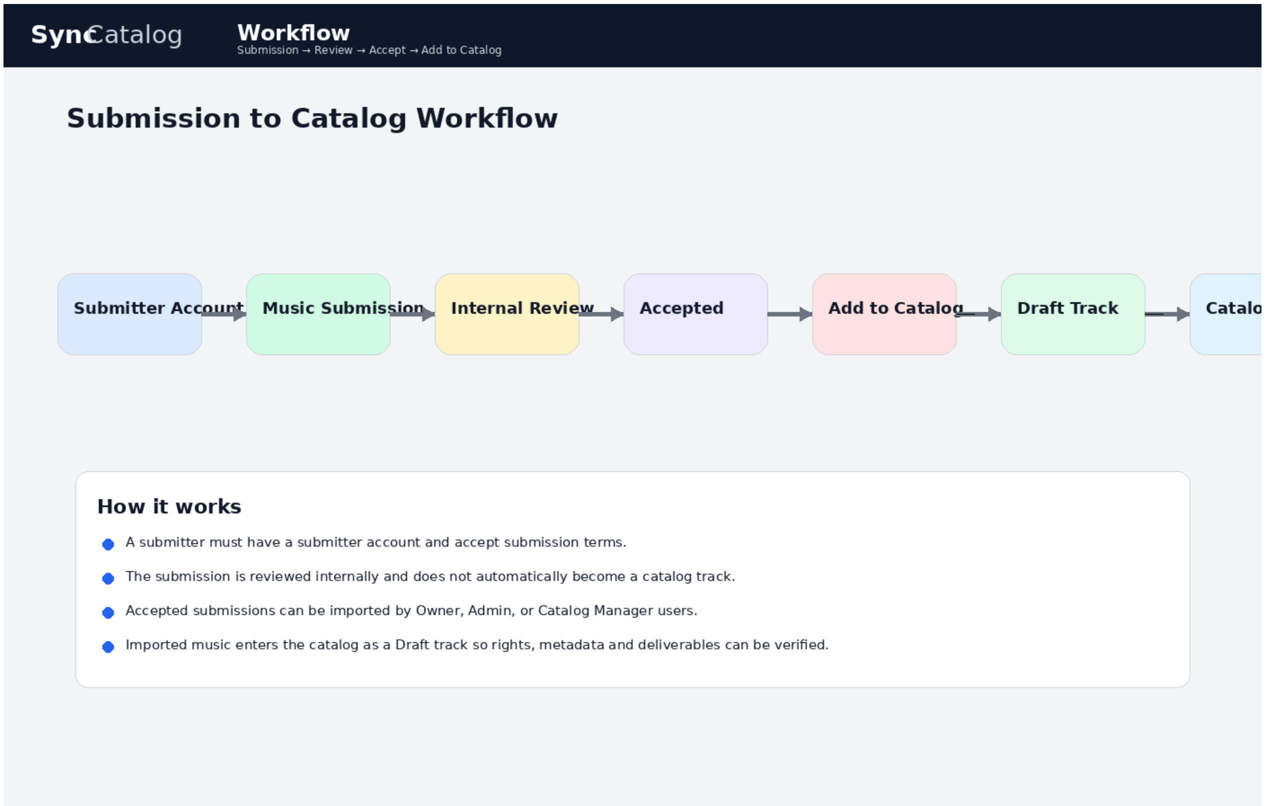

Figure 13. Submission-to-catalog workflow from submitter account through Draft catalog track completion.

62. End-to-End Workflow: Opportunity to Pitch Room

1. Create or open the CRM Client and Project.

2. Create a Pitch linked to that CRM context.

3. Add candidate tracks.

4. Resolve every readiness blocker.

5. Mark the pitch Ready.

6. Preview the Pitch Room.

7. Generate/share the secure recipient link and update status to Sent according to your process.

8. Review recipient activity and material requests.

9. For approved requests, create exact-file Approved Deliveries with expiration/revocation controls.

10. Create CRM tasks for follow-up and maintain the project/pitch status as the opportunity evolves.

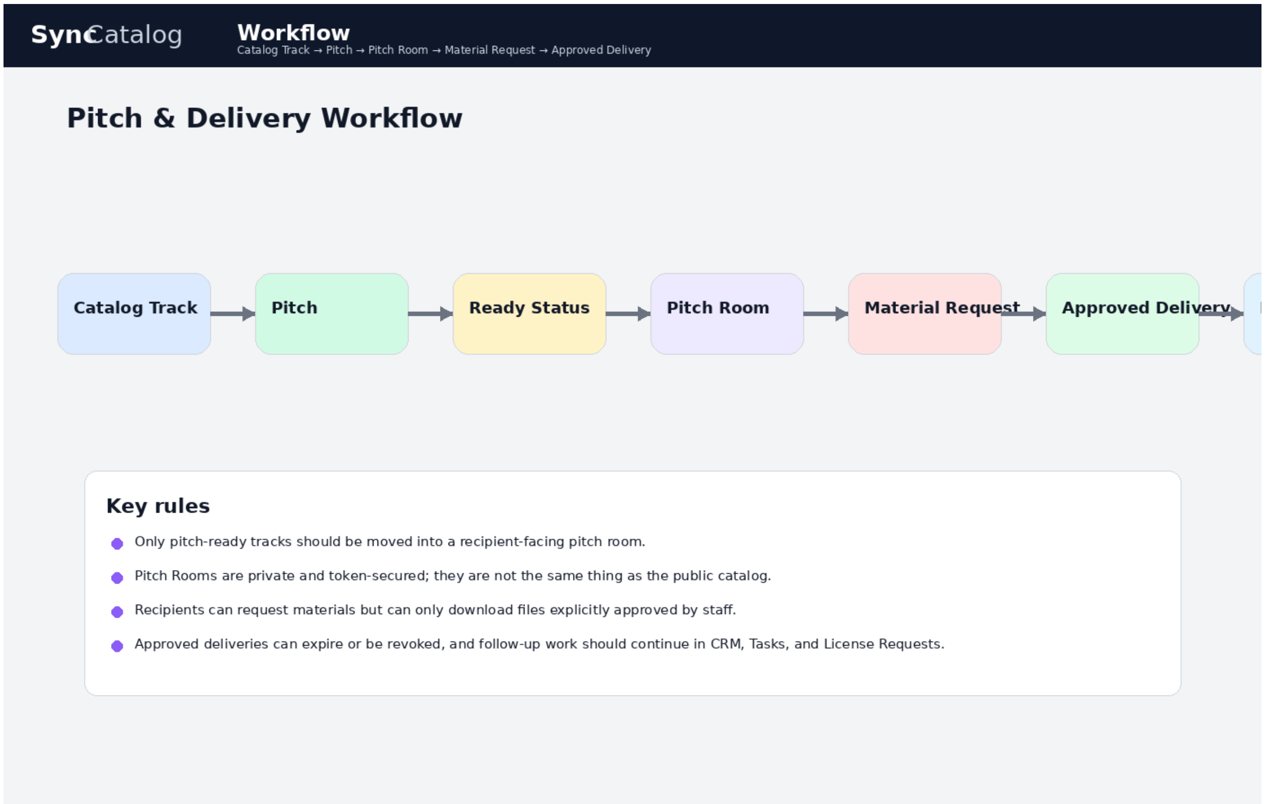

Figure 14. Pitch-to-delivery workflow from catalog track to Pitch Room, requests, and approved delivery.

63. End-to-End Workflow: Public License Inquiry

1. Recipient finds a Sync Ready track in the public catalog and opens the license inquiry form.

2. The inquiry becomes a New License Request.

3. Licensing staff review the intended use, territory, term, budget and deadline.

4. Link the request to a CRM Client/Project if appropriate.

5. Move through Contacted and Quoted as negotiations progress.

6. Use Calendar/Tasks and automatic deadline notifications for follow-up.

7. After actual agreements and approvals are complete, update to Licensed; otherwise use Declined or Closed as appropriate.

64. Status Reference

Area	Current values
Track	Draft; Catalog Ready; Sync Ready; Do Not Pitch; Archived
Submission	New; Listening; Shortlisted; Accepted; Declined
Pitch	Draft; Ready; Sent; Closed; Archived
Material Request	New; Reviewing; Fulfilled; Declined
License Request	New; Contacted; Quoted; Licensed; Declined; Closed

Area	Current values
Client	Prospect; Active; Inactive
Project	Open; Active; On Hold; Completed; Cancelled
Task	Open; In Progress; Completed; Cancelled
Task Priority	Low; Normal; High; Urgent
Calendar Event	Scheduled; Completed; Cancelled
Calendar Type	Meeting; Deadline; Follow-up; Task; Other

65. Role Quick Reference

Action	Owner	Admin	Catalog Mgr	Sales	Reviewer
Create/edit tracks	✓	✓	✓	—	—
Review submissions	✓	✓	✓	—	✓
Import accepted submission	✓	✓	✓	—	—
Manage license requests	✓	✓	—	✓	—
Manage pitches	✓	✓	✓	✓	—
Manage CRM	✓	✓	—	✓	—
Configure integrations	✓	✓	—	—	—
Manage team/roles	✓	✓*	—	—	—
Change owner access	✓	—	—	—	—

** Admin can manage ordinary members but cannot promote to Owner, demote/remove an Owner, or bypass final-owner protections.*

66. Screen & Route Reference

Screen	Purpose	Typical path
Dashboard	Dashboard	/dashboard
Catalog	Catalog list/search	/catalog
New Track	Create track	/catalog/create
Track Editor	Edit a track	/catalog/{track}/edit
Bulk Import	Batch MP3 import	/catalog/import

Screen	Purpose	Typical path
Draft Review	Review Draft imports	/draft-review
AI Batch	Business/Enterprise bulk AI analysis (up to 5 tracks)	/catalog/ai-metadata/batch
AI Review	Review pending AI suggestions	/catalog/ai-metadata/review
AI Taxonomy	Manage controlled AI/tag taxonomy	/catalog/ai-taxonomy
Artists	Artist directory	/artists
Calendar	Events/deadlines	/calendar
Pitches	Pitch list	/pitches
Pitch Room	Private recipient portal	/pitch-room/{token}
License Requests	Internal inquiry queue	/license-requests
Clients	CRM client list	/clients
Projects	CRM projects	/projects
Tasks	Tasks/follow-ups	/tasks
Submissions	Internal review inbox	/submissions
My Submissions	Submitter history	/my-submissions
Artist Submit	Submitter intake	/artist/submit
Team	Members/invitations/meetings	/team
Team Activity	Activity feed	/team/activity
Messages	Direct-message inbox	/messages
Notifications	Personal notification list	/notifications
Public Access	Catalog/submission switches	/settings/public-access
Integrations	Provider settings	/settings/integrations
Support	Customer ticket list	/support
Support Center	Published help, manual access and public Ask SyncCatalog	/support-center
Ask SyncCatalog	Floating product assistant; general help on all plans; Professional+ page-aware current-record guidance when OpenAI is connected	Global launcher; contextual authenticated requests use /assistant/ask
Public Catalog	Public discovery	/browse
Public Artists	Public artist directory	/browse/artists
Public Track	Public track page	/browse/tracks/{track}

Screen	Purpose	Typical path
Public License Form	Public inquiry	/license/{track}

67. Troubleshooting

Problem	What to check
A menu item is missing	Check your organization role and whether the plan includes the feature. Role/plan restrictions are enforced server-side.
I cannot add another track	The organization may have reached its plan track limit.
Bulk import rejects a file	Confirm it is a real MP3 and keep the batch at 20 files or fewer.
A track does not appear publicly	Confirm Public Catalog is ON and the track status is Sync Ready.
A pitch cannot be marked Ready	Every selected track must pass Pitch Readiness and the pitch must contain at least one track.
A Pitch Room link returns not found	The token may be revoked/invalid, the pitch may not be Ready/Sent, or the pitch may have expired.
Pitch audio does not play	The file must be the authorized Main audio for a track in that pitch and the track must remain pitch-ready.
I cannot import an accepted submission	Reviewer can review but cannot import. Use an Owner/Admin/Catalog Manager account and check track limits.
OpenAI analysis is unavailable	Verify that the plan includes the requested AI feature, then check Settings → Integrations for an enabled OpenAI integration with a stored API key and successful connection test. Starter supports single-track metadata; bulk AI requires Business or Enterprise.
Video meeting will not start	Connect and successfully test Daily. Team/video features also require the eligible collaboration plan.
A teammate cannot see my support ticket	This is expected: customer support tickets are private to the user who opened them.
I cannot message a coworker	Both users must be active members of the same organization, the plan must include Team & Collaboration, and the conversation must include you as a participant.
Public submissions are closed	Owner/Admin should check Settings → Public Access → Public Submissions.
Forgot Password did not reveal whether the email exists	This is intentional anti-enumeration behavior. Check the mailbox for an active registered account.
Ask SyncCatalog answers generally but not about the current record	First confirm the plan includes contextual Ask SyncCatalog (Professional, Business or Enterprise) and that you are on a supported detail page. Real customer context also requires connected OpenAI. Without it, general product help still works; an Owner/Admin can connect OpenAI in Settings → Integrations. Active demo sandboxes simulate context locally.
Ask SyncCatalog escalates instead of answering	The available approved knowledge/context may be

Problem	What to check
	insufficient or the issue may require human review. Use Help & Support and include the exact screen/action/error.
A guided action is not shown	Actions are context-dependent and server-controlled. The assistant does not invent destinations; use the normal workspace navigation if no safe action applies.

68. Glossary

Term	Definition
Catalog	The organization's managed collection of tracks and associated operational data.
Sync	Music licensed for synchronization with visual media or other synchronized uses.
Master	The copyright/rights in a specific sound recording.
Publishing	Rights in the underlying musical composition.
One Stop	Operational shorthand for a situation where the required master and publishing clearance can be handled through one controlling source, when actually true.
PRO	Performing Rights Organization.
IPI/CAE	Identifier used for writers/publishers in rights systems.
ISRC	International Standard Recording Code for a specific recording.
BPM	Beats per minute.
Stem	Separated production element/group such as drums, vocals or guitars.
Deliverable	Version/file/material that can be supplied for licensing.
Pitch	Internal package of tracks prepared for a recipient/opportunity.
Pitch Room	Token-secured client portal for one pitch.
Pitch Readiness	Rule-based operational completeness check with score, blockers and warnings.
Submission	Music sent by an external submitter for internal review.
Client	CRM company/relationship record.
Project	CRM opportunity/production/campaign record connected to licensing work.
Tenant	A SyncCatalog organization boundary; one tenant cannot access another tenant's data.
Context Card	Structured track/pitch/submission/client/project reference attached to a Direct Message.

Term	Definition
Approved Delivery	Exact file intentionally made downloadable to a Pitch Room recipient, with protection/expiry/revocation.
Ask SyncCatalog	SyncCatalog's read-only AI-assisted help interface. General product help is available on every plan through SyncCatalog's hosted support AI. Professional+ can add sanitized, tenant-scoped record context through the organization's connected OpenAI account; active demo sandboxes use a local simulator. Guided actions are server-approved navigation only.

69. Administrator Checklist

1. Confirm at least one Owner remains active.

2. Review Team membership and remove access that is no longer needed.

3. Review plan/seat/track limits before onboarding a large batch.

4. Set Public Catalog and Public Submissions intentionally under Settings → Public Access.

5. Configure only the integrations actually needed; rotate third-party credentials when staff changes or compromise is suspected.

6. Test the organization's OpenAI connection before relying on customer-work AI (Starter+ metadata, Professional+ contextual help, Business+ bulk AI), and test Daily before scheduling video meetings. General Ask SyncCatalog product help does not require a customer OpenAI key.

7. Establish an internal standard for when a track may move to Catalog Ready and Sync Ready.

8. Require rights confirmation before final licensing decisions.

9. Use CRM projects/tasks/calendar instead of keeping critical deadlines only in personal email.

10. Use Pitch Room Approved Deliveries instead of sending unrestricted catalog file links.

11. Review support and activity information regularly, but keep formal contracts and source rights documentation in the organization's authoritative record system.

70. Feature Inventory: Current Build

Area	What it includes	State
Authentication	Login, active-user enforcement, forgot/reset password, forced password change	Live
Submitter accounts	Registration, Artist Submit, My Submissions, terms acceptance	Live
Dashboard	Role-aware overview and shortcuts	Live
Catalog	Search/filter, create/edit tracks, statuses	Live
Artists	Directory, create/edit for catalog roles, public artist pages	Live

Area	What it includes	State
Audio	Private MP3 storage/streaming, versions, waveform players, technical metadata	Live
Bulk Import	Up to 20 MP3s, metadata extraction, duplicate checksum handling	Live
Draft Review	Review incomplete Draft imports	Live
Sync Metadata	Tags/taxonomy/search descriptors	Live
AI Metadata	OpenAI semantic suggestions, confidence/reason, accept/reject; single-track on Starter+; batch max 5 and review queue on Business+	Live with connected organization OpenAI; demo simulation available
AI Taxonomy	Seed/add/edit/delete controlled taxonomy	Live
Rights	Master/publishing control, confirmation, one-stop, third-party issues, restrictions	Live
Writers/Publishers	PRO/IPI, splits, validation, reusable directory records	Live
Deliverables	Instrumental/clean/alternates/stems/WAV/etc availability	Live
Pitch Readiness	Score, blockers/warnings, pitch gating	Live
Track comments	Threads, edit/delete, mentions/notifications on team plans	Live
Public Catalog	Browse/search/filter, public artist/track pages and preview audio	Live
Public Access	Independent Public Catalog/Public Submissions switches	Current build feature
License Requests	Public inquiry → internal queue/status/CRM/deadline	Live
Submissions	Internal review statuses, protected audio, import to Draft catalog	Live
Pitches	Create, CRM-link, tracks, statuses, preview, share/revoke	Live
Pitch Room	Token-secured recipient portal and protected playback	Live
Recipient Activity	Pitch-room activity tracking	Live
Material Requests	Recipient request + staff status workflow	Live
Approved Deliveries	Exact-file protected download, expiry/revocation/counts	Live
CRM Clients	Search/status, contacts, projects, linked work	Live
CRM Projects	Types/statuses, brief/deadline/budget/team, linked work	Live
Tasks	Assignments, priority, due dates, complete/reopen	Live
Calendar	Events, timezone, edit/cancel, linked meeting	Live
Daily Meetings	Team/calendar video meetings and tokenized guest join	Live with connected Daily

Area	What it includes	State
Team	Members, roles, direct add, invitations, seat enforcement	Live on eligible plans
Activity	Recent team activity feed	Live on eligible plans
Notifications	Unread badge/list/read-all/target navigation	Live on eligible plans
Direct Messages	Full inbox, unread state, new 1:1 conversations, send/reply	Live on eligible plans
Floating Messenger	Site-wide panel, unread badge, periodic refresh, inbox link	Live on eligible plans
Message Context	Track/Pitch/Submission/Client/Project cards with org validation	Live
Integrations	Encrypted provider configuration; Starter OpenAI-only path; broader integrations on Professional+; OpenAI/Daily active adapters	Live / plan- and provider-dependent
Ask SyncCatalog	General hosted help on all plans; Professional+ page-aware context for Track, License Request, Client, Project, Pitch and Submission; browser-session follow-ups; server-approved guided navigation	General help live; real context requires connected org OpenAI; demos simulate locally
Support Tickets	Private customer tickets, replies, reference IDs	Live
Staff Support Inbox	Public replies, internal notes, status/priority/assignment	Platform admin
Public Demo	Read-only demo account and exit flow	Live
Client Demo Sandboxes	Temporary isolated writable 7-day demos, sharing/revoke, local simulated contextual AI and metadata AI	Hosted build / owner-admin; demo AI makes no external request
Marketing Leads	Platform inquiry administration	Platform admin / deployment-dependent

71. Configuration-Ready but Not Yet the Active Workflow Adapter

The provider registry contains entries that are not current active workflow adapters. Some may be hidden or unavailable to customers until a supported adapter is enabled. This section documents those limitations so registry presence is not mistaken for supported live functionality.

Provider	Current limitation
Anthropic	Registered future AI provider; not currently exposed/usable as a customer-work AI engine. Current AI workflows use OpenAI.
Google Gemini	Registered future AI provider; not currently exposed/usable as a customer-work AI engine. Current AI workflows use OpenAI.

Provider	Current limitation
Twilio Video	Video provider entry exists, but the current VideoMeetingProviderManager selects Daily.
Company SMTP	Configuration fields exist; the current integration tester does not provide an SMTP connection test.
S3-Compatible Storage	Configuration fields exist; the current integration tester does not provide an S3 connection test and ordinary catalog file behavior should not be assumed to switch automatically merely by saving this card.

72. Final Operating Principle

SyncCatalog is most effective when the catalog is treated as the operational source of truth for music-licensing work: creative metadata helps people find the track; rights data explains what can be cleared; readiness surfaces missing work; CRM identifies who and what the opportunity is; pitches control what the recipient sees; approved deliveries control what the recipient can download; tasks/calendar/messages keep the team aligned; and support/security controls protect the system around that workflow. Ask SyncCatalog sits on top of that workflow as a read-only guide: general help is platform-managed, customer-record AI uses the customer's connected OpenAI account, demos can simulate AI locally, and the underlying SyncCatalog records remain the source of truth.

When in doubt, preserve the distinction between "information entered" and "information verified." That distinction is the foundation of a reliable licensing catalog.