SyncCatalog

Complete User & Administrator Manual

Version 2.4 | Illustrated edition | September 25, 2026

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

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

VERSION 2.4 UPDATE

This edition adds SyncCatalog Desktop, public support for users who cannot sign in, the hosted staff communications workspace, and the optional provisioned SyncCatalog Call Center add-on with call routing, voicemail, recording, transcription, AI call logs and follow-up workflow. It also updates the feature inventory, troubleshooting, security notes and end-to-end workflows to reflect the current product direction.

About This Manual

This manual documents SyncCatalog as a working music-licensing operations platform. It is written for customers and staff who need to understand what each feature does, who can use it, what information it stores, and how it connects to the rest of the workflow.

IMPLEMENTED FEATURES VS. PROVISIONED ADD-ONS

The manual separates standard live workflows, provider-dependent workflows, platform-staff functions and optional provisioned add-ons. In particular, SyncCatalog Call Center is sold and installed on order; it should not be assumed present in an organization until it has been provisioned and enabled.

PLAN-DEPENDENT FEATURES

Menus and actions can depend on the organization plan, role and feature entitlements. Track, seat, AI, Desktop, integrations, collaboration and add-on availability can change by commercial plan. The current Pricing page is the authoritative commercial source.

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 final 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. “Platform staff” means SyncCatalog operational staff rather than customer-organization users.

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PART I

Getting Started

Accounts, roles, navigation, plans and the operating model.

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.

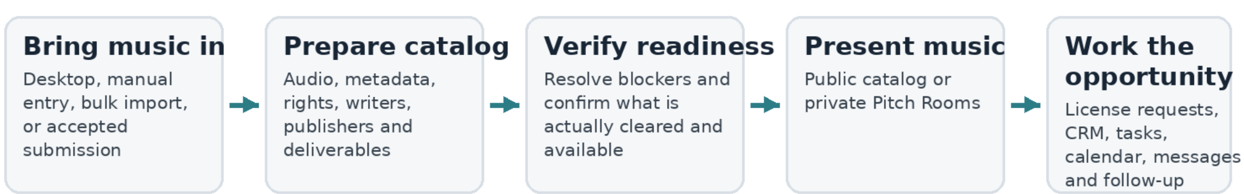
Core workflow

1. Music enters the system through manual catalog entry, bulk import, an accepted submission, or SyncCatalog Desktop.
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, meetings and follow-up stay connected to the same organization workspace.
7. Organizations that purchase the Call Center add-on can extend the workflow into business calling, voicemail, call logs and AI-assisted follow-up after provisioning.

What SyncCatalog does not do automatically

- Guarantee placements or licensing revenue.
- Determine copyright ownership on its own.
- Make a rights record legally correct merely because every field is filled in.
- Expose private catalog files for download unless a workflow explicitly authorizes delivery.
- Make every configured third-party provider operational merely because a configuration slot exists.
- Enable provisioned add-ons before they have been ordered, configured and activated.

SyncCatalog operating cycle



Core principle: information entered is not the same as information verified.

SyncCatalog connects the workflow, but users remain responsible for rights verification, approvals and final licensing decisions.

Figure 1. SyncCatalog connects intake, catalog preparation, rights, presentation and commercial follow-up.

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. Do not share owner or administrator logins; permissions, activity and notifications are tied to the individual user.

Temporary-password accounts

1. Sign in with the temporary credentials supplied by the administrator.
2. Open the required Change Password screen.
3. Enter the 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 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 are invalidated where applicable.

RESET-LINK SECURITY
Reset tokens expire. The current hosted 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, Theme and Product Assistants

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 capability, the plan does not include it, or a provisioned add-on has not been enabled.

Workspace navigation	System / account navigation
Dashboard; Catalog; Artists; Calendar	Settings / Public Access
Pitches; CRM / Clients; Projects; Tasks	Integrations when permitted
Submissions; License Requests	Notifications and Help & Support
Team; Messages; Meetings where enabled	Platform-administration links for platform staff/admins

Light and dark mode

Use the Light/Dark theme control in the sidebar. The preference is stored in the browser and does not alter permissions or data.

Ask SyncCatalog launcher

Ask SyncCatalog appears as a floating help launcher on supported public and authenticated screens. It can answer product questions and, on supported record-detail pages, use a sanitized server-generated snapshot of the record being viewed. The assistant is read-only and does not replace rights verification.

1. Open Ask SyncCatalog.
2. Ask a product question in ordinary language.
3. Use New to clear the current browser-tab conversation for that context.
4. Close the panel or press Escape when finished.

4. Roles and Permissions

Role	Catalog	Submissions	Licensing	Pitches	CRM	Integrations	Team admin
Owner	Manage	Review/import	Manage	Manage	Manage	Manage	Manage
Admin	Manage	Review/import	Manage	Manage	Manage	Manage	Manage
Catalog Manager	Manage	Review/import	No	Manage	No	No	No
Sales	View where allowed	No	Manage	Manage	Manage	No	No
Reviewer	No	Review only	No	No	No	No	No

VIEWING VS. MANAGING
A user may be able to view a directory without being able to create or edit its records. The interface and server-side authorization work together; hiding a button is not the security boundary.

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. A stale browser page can therefore display an action that the server still rejects because of a current limit or entitlement.

Track limits

The current plan can set a finite track limit or unlimited tracks. The same limit is enforced across manual creation, accepted-submission import, bulk import and any other catalog-ingest path that creates cloud catalog records.

Team seats

Plans with a finite seat limit count active members. Pending invitations can also count toward the limit so outstanding invites do not overbook seats.

Desktop entitlement

SyncCatalog Desktop requires an active SyncCatalog account with Desktop access. The entitlement check is separate from ordinary web sign-in so the application can refuse access when a subscription or Desktop entitlement is not active.

Optional paid add-ons

Some capabilities are sold and provisioned separately. SyncCatalog Call Center is the current example: it is configured for the organization after order rather than being enabled automatically for every plan.

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.

1. Scan statistics and recent-work sections for items needing attention.
2. Use recent track, submission and license-request links to jump directly into work.
3. Use Workspace navigation for deeper lists and search.
4. Use System navigation for settings, integrations, support and administrative tools.

PUBLIC CONTROLS LIVE IN SETTINGS
Public Catalog and Public Submissions are managed together under Settings → Public Access. They are intentionally not duplicated as Dashboard switches.

PART II

Catalog & Rights

Tracks, audio, metadata, AI assistance, rights, deliverables and readiness.

7. Catalog List, Search and Filtering

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

Catalog search

Search can match core fields such as title, album, catalog number and artist relationships. Workflow filters include track status, vocal type and tempo class. Pagination keeps large catalogs manageable.

Status	Recommended use
Draft	Incomplete working record while audio, metadata, rights or other information is still being assembled.
Catalog Ready	Organized for internal catalog use but not necessarily cleared for pitching.
Sync Ready	Eligible for sync-facing use and the status used by the public catalog.
Do Not Pitch	Retain the record while excluding it from pitching workflows.
Archived	Retain historical data outside the active working catalog.

8. Creating and Editing Tracks

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, then continue in the Track Editor for audio, metadata and rights.

Field	Use
Catalog Number	Internal catalog identifier.
Title	Track title used across catalog, pitches and requests.
Album / Year	Optional release context.
Lyrics	Reference lyrics for internal/catalog use.
Vocal Type	Instrumental, Male, Female, Duet, Group, Mixed or Other.
Tempo Class / Energy	High-level creative descriptors.
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

9. Artists

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

1. Open Artists to browse the organization's directory.
2. Open an artist to see 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.

PUBLIC ARTIST PAGES
When 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.

Version type	Typical use
Main	Primary master/listening version.
Instrumental	No lead vocal.
Clean	Edited version suitable for content restrictions.
Alternate	Alternate arrangement or mix.
Acapella	Vocal-focused version.
No Drums	Mix without drums.
Underscore	Dialogue-friendly or reduced mix.
60 / 30 / 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 the internal player/waveform interface to verify the upload.

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 and validated when supplied.

11. Browser Bulk Import

Browser Bulk Import adds multiple MP3s as draft catalog records from Catalog in the web application. It is available only to users with catalog-management permission and still obeys the organization track limit.

1. Open Bulk Import from Catalog in the web application.
2. Select up to 20 MP3 files for that browser upload request.
3. Start the import; SyncCatalog inspects files and extracts available embedded metadata.
4. For each accepted file, SyncCatalog creates a Draft track, finds or creates the artist, creates a Main version and stores the audio privately.
5. Where usable embedded genre metadata exists, it can be mapped into the organization metadata structure.
6. Review the result summary; invalid files and duplicate checksums are skipped/reported.
7. Continue to Draft Review or the Track Editor to finish rights and metadata.

DESKTOP IMPORTS ARE NOT LIMITED TO 20 FILES. The 20-file limit above applies only to a single Browser Bulk Import request. It does not apply to SyncCatalog Desktop, which is designed for existing catalog and library migrations and can queue larger selections for controlled processing.

12. Draft Review

Draft Review provides a staging workflow for 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 organization’s required information has been checked.
5. Use Pitch Readiness before treating the 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. Creative descriptors are intentionally separate from legal/rights facts.

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 or 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. A controlled taxonomy keeps search terms consistent and constrains AI suggestions to useful vocabulary.

14. AI Metadata Assistant

The current live AI metadata workflow uses OpenAI. It is limited to semantic and creative metadata and must not be treated as a source of truth for ownership, clearances, writer splits, ISRCs or other deterministic rights facts.

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 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; re-analysis replaces old pending suggestions rather than erasing review history.

Batch analysis and review

1. Open Catalog → AI Metadata Batch.
2. Select between 1 and 5 organization tracks.
3. Run the batch analysis.
4. Open the AI Review queue to evaluate pending suggestions.
5. Accept Selected or Reject Selected as appropriate.

CONFIDENCE IS A REVIEW AID

High confidence does not make a suggestion objectively true. A human catalog manager remains responsible for the final metadata.

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 / Publishing Control %	Percentage the organization can control, 0–100.
One Stop	Indicates necessary sides can be cleared through one controlling source when accurate.
Master / Publishing Clearance Confirmed	Internal confirmation that the corresponding side has been verified.
Samples / Interpolations	Tri-state answer: unknown, yes or no.
Third-Party Approval Required	Tri-state answer for additional approval requirements.
Restrictions / Rights Notes	Specific restrictions, exceptions or follow-up information.

1. Enter owners and control percentages based on actual agreements or verified records.
2. Set clearance confirmation only when each side has truly been reviewed.
3. Record samples, interpolations and third-party approval requirements explicitly.
4. Use Restrictions and Rights Notes for information the licensing team must not miss.
5. 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.

Record	Fields
Writer	Name; PRO affiliation; IPI/CAE; ownership percentage.
Publisher	Publisher name; PRO affiliation; IPI/CAE; ownership percentage.

SPLIT VALIDATION
A track can hold up to 25 writer rows and 25 publisher rows. Duplicate 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 controlling documentation.
4. Resolve duplicate spellings rather than creating two versions of the same party.
5. Before licensing, confirm the aggregate information matches the actual agreement chain.

17. Deliverables

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

Type	Examples
Core alternates	Instrumental, Clean, Alternate, Stems, WAV Master
Mix variants	Acapella, No Drums, Underscore
Cutdowns	60 sec, 30 sec, 15 sec, Sting

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.

18. Pitch Readiness

Pitch Readiness is a rule-based quality-control layer. It 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.

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

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 so catalog questions remain close to the track instead of being scattered across email.

1. Open a track and locate Comments.
2. Add a top-level comment or reply.
3. Mention a teammate where the control is available.
4. Mentions can create a personal notification.
5. Edit or delete comments according to the permissions shown for your account.

SCOPE
Track comments are record-focused. Use Direct Messages for broader private team communication and contextual message attachments when discussing pitches, submissions, clients or projects.

PART III

Public Catalog & Intake

Public discovery, licensing inquiries and external music submissions.

20. Public Catalog

The public catalog is the client-facing discovery experience. It uses the same underlying catalog data but exposes only eligible Sync Ready tracks when Public Catalog is enabled.

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

Public track and artist pages

A public track page can present the public-facing artist relationship, tags, Main recording preview and selected rights/deliverable/version context. Public artist pages collect eligible Sync Ready tracks associated with that artist.

PUBLIC VS. PRIVATE AUDIO
The public preview route is separate from authenticated catalog audio. Turning Public Catalog off blocks the public browse/artist/track/preview experience without deleting private files or internal records.

21. Settings → Public Access

Switch	When ON	When OFF
Public Catalog	Public browse, artist pages, track pages and authorized preview audio are available for eligible content.	Public catalog endpoints are unavailable; the internal workspace remains available.
Public Submissions	The organization accepts new artist/submitter submissions.	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 after changing exposure.

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.

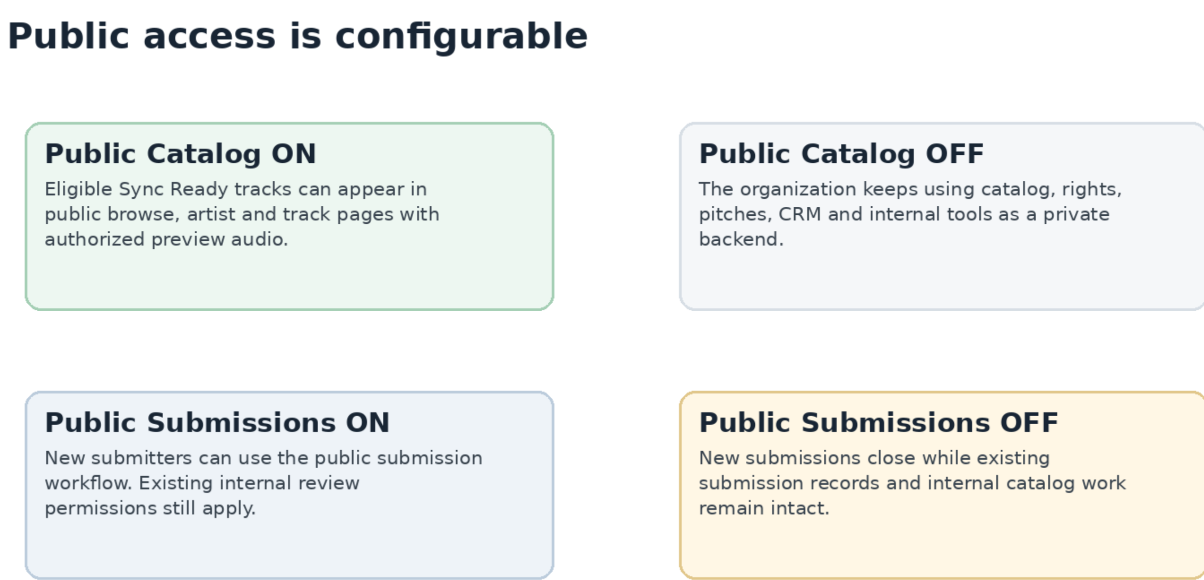


Figure 2. Public Catalog and Public Submissions can be enabled independently.

22. Public License Requests

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

- Requester name, email and company
- Project name
- Use type and usage description
- Territory and license term
- Budget range and deadline
- Message
- Track and, when applicable, track version

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

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 Artist Submit.
4. Review and accept submission guidelines/terms before the form will accept music.
5. Use My Submissions to review the submitter's own submitted items and statuses.

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

24. Creating a Music Submission

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

Group	Examples
Contact	Submitter name/email; optional phone/company; message; source.
Track / music	Title; artist; album/year; lyrics; explicit; vocal; tempo; BPM/key; ISRC; genre/mood/scene/theme; MP3/listening reference.
Rights	Master/publishing owners; control percentages; one-stop; samples/interpolations; approvals; restrictions.
Credits / deliverables	Writers and splits; publishers and splits; deliverable availability.

25. Internal Submission Review

Status	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 through the protected submission player.
3. Review contact, creative metadata, rights, writers/publishers and deliverables.
4. Update status as the review progresses.
5. If Accepted, an Owner/Admin/Catalog Manager can add the track to Catalog; Reviewer can review/status but cannot import.

26. Importing an Accepted Submission to the Catalog

1. Open an Accepted submission.
2. Choose Add to Catalog for an accepted, unimported track.
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 catalog storage and preserves the original submission file.
5. The submission is linked to the new catalog track only after import succeeds.
6. Open the resulting catalog track and verify all imported information before changing status or pitching.

CLEARANCE CONFIRMATION IS NOT INHERITED BLINDLY

Imported rights data is a starting record. Submission claims do not become automatic legal clearance; the catalog team must verify them.

PART IV

Pitches & Client Portal

Internal pitch management, secure recipient rooms, activity, requests and controlled delivery.

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.

Field / status	Use
Title / Project / Recipient	Identify the opportunity and destination.
CRM Client / Project links	Keep the pitch connected to the commercial relationship.
Draft	Working selection; tracks or details can still change.
Ready	Every selected track passes Pitch Readiness and the package is approved for recipient use.
Sent	Pitch has been delivered or treated as delivered.
Closed / Archived	Opportunity is no longer active or is retained historically.

1. Open Pitches → Create Pitch.
2. Enter recipient/opportunity information and link CRM context when appropriate.
3. Save as Draft.
4. Add catalog tracks and review readiness for each.
5. Resolve blockers on underlying catalog tracks.
6. When every selected track is ready and at least one track is included, mark the pitch Ready.

TRACK CHANGES RESET READINESS

If a Ready pitch changes 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

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.
4. Copy/send the secure Pitch Room link to the intended recipient.
5. Revoke the link when access should end.

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. The recipient does not need an internal SyncCatalog account.

- Open the token-secured room.
- View selected tracks and presentation metadata.
- Play authorized Main-version audio.
- Generate supported activity signals as the room is used.
- Request materials from the licensing team.
- Download only files explicitly approved through the Approved Deliveries workflow.

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.

30. Recipient Activity

The Client Portal records supported recipient activity so staff can see engagement associated with the pitch. Activity is operational context, not proof of commercial intent.

1. Open the Pitch detail workspace.
2. Review recipient/client activity.
3. Use timestamps and event context to understand interactions.
4. Follow up using normal client communication and CRM tasks.

31. Material Requests

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

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

32. Approved Deliveries

Approved Deliveries allow a recipient to download an exact file approved for the pitch without receiving broad access to private catalog storage.

1. Open the material request.
2. Choose the exact file to deliver.
3. Set or accept expiration controls.
4. Save the delivery so the Pitch Room receives a protected download link.
5. Recipient downloads are counted/logged as supported activity.
6. Revoke the delivery if access should end early.

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.

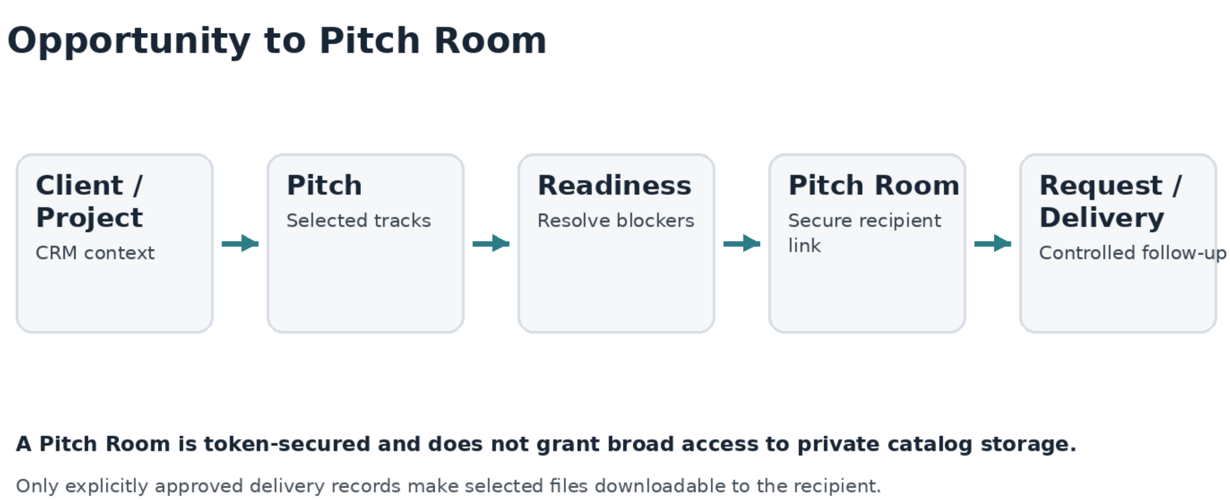


Figure 3. The Pitch Room path keeps recipient access scoped to one opportunity and explicitly approved material.

33. License Requests

Status	Typical stage
New	Inquiry received.
Contacted	Team has responded or opened direct communication.
Quoted	Pricing/terms have been quoted.

Status	Typical stage
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.

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 scheduled reminder workflow can notify users with licensing-management capability at 7, 3 and 1 days before the deadline. Dedupe logic prevents repeated identical reminders for the same window.

PART V

CRM & Work Management

Clients, contacts, projects, tasks, calendar and linked video meetings.

35. CRM Overview

The CRM area connects companies and people to projects, pitches, licensing requests and follow-up work. The intended chain is Client → Contact → Project → Pitch / License Request → Task / Calendar follow-up.

36. Clients

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

Client fields include Name, Status, Website and Notes. The client detail workspace combines contacts, projects, open tasks, recent pitches and linked license requests.

37. Client Contacts

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

Field	Use
Email / Phone	Communication details.
Primary	Preferred primary contact.
Notes	Relationship/context notes.

PRIMARY CONTACT BEHAVIOR
Setting one contact as Primary clears the primary flag from other contacts for the same client so the current workflow maintains one primary contact.

38. Projects

Projects organize licensing work for a production, campaign or opportunity and can be linked to a Client. Supported project types include Film, Television, Trailer, Advertising, Game, Web/Social, Podcast and Other. Status values are Open, Active, On Hold, Completed and Cancelled.

- Project name
- Client
- Project type and status
- Brief
- Deadline
- Budget minimum / maximum and currency
- Notes
- Team members where assigned

39. Tasks & Follow-ups

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

- Title and description
- Client / Project links
- Assigned user
- Due date/time

The task list supports search/filtering, overdue highlighting, due-next-seven-days counts, Complete and Reopen actions.

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.

Event field	Examples
Type	Meeting; Deadline; Follow-up; Task; Other
Status	Scheduled; Completed; Cancelled
Time	Date; start/end time or all-day; timezone

Event field	Examples
Context	Assigned user; location; notes; optional linked record; optional video meeting

1. Open Calendar and choose Create Event.
2. Enter title and 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 and edit later as details change.
6. Use Cancel rather than deleting when cancelled history should remain.

41. Calendar Video Meetings

When a supported video provider is connected, a Calendar event can start a video meeting. The resulting meeting record links back to the event so schedule and meeting context remain connected.

1. Create or open a Calendar event.
2. Use Start Video Meeting when available.
3. SyncCatalog creates the external room and stores meeting reference, guest token, start time and expiration.
4. Open the meeting internally or share the guest entry link as appropriate.
5. End the meeting when finished.

PART VI

Team & Collaboration

Members, invitations, activity, notifications, direct messages and contextual collaboration.

42. Team Workspace

Team & Collaboration is plan-gated. On eligible plans, team members can see the roster; Owner/Admin can manage membership, roles and invitations.

- 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.

43. Adding a Team Member Directly

1. Open Team.
2. Enter email, optional display name and role.
3. If the email does not yet belong to a SyncCatalog account, supply and confirm a temporary password.
4. Submit; SyncCatalog rejects inactive existing accounts and duplicate membership.
5. For a newly created account, provide temporary credentials securely; the user must change the password on first use.

44. Invitations

1. Open Team → Invite Member.
2. Enter email and select Admin, Catalog Manager, Sales or Reviewer.
3. Create the invitation.
4. If outbound invitation email is not configured, copy the secure invitation link and send it directly.
5. The current invitation expires after 7 days.
6. Recipient signs in or creates credentials, then accepts.
7. Revoke a pending invitation if it should no longer be usable.

OWNER ROLE IS PROTECTED

Owner is not a normal invite target. Admin cannot alter or remove an Owner, and the final Owner cannot be demoted.

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. Treat it as operational history rather than a replacement for formal legal or contract records.

46. Notifications

- Unread items sort ahead of read items, then newest first.
- The current list loads a recent working set of notifications.
- Open marks an item read and routes to the related record when supported.
- Mark All Read clears unread state for the user's organization notifications.
- Mentions and licensing-deadline reminders are examples of supported notification sources.

47. Direct Messages

Direct Messaging is a Team & Collaboration feature for private same-organization conversations. It includes a full inbox, new one-to-one conversations, replies and unread/read state.

- 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 floating messenger is available across the main application. It shows an unread badge, lets a user open conversations, start a message and reply inside the panel, 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.

- Track
- Pitch
- Submission
- Client
- Project

CONTEXT DOES NOT GRANT PERMISSION

A context card does not grant new authorization. The recipient still needs normal role/tenant permission to open the referenced area.

PART VII

Desktop, Integrations & Meetings

Bring existing catalog data into SyncCatalog and connect supported external providers.

49. SyncCatalog Desktop

SyncCatalog Desktop is the companion application for organizations that already have a catalog database or local music library. It reduces the need to rebuild existing catalog data track by track in the browser.

What Desktop is for

- Work with an existing local music database or library.
- Review and select the recordings that should be brought into SyncCatalog.
- Transfer track information, metadata and available versions supported by the installed Desktop build.
- Use the same SyncCatalog account identity while keeping Desktop access subject to entitlement.

DESKTOP IS NOT A SEPARATE CATALOG

Desktop is an import and local-library companion. The SyncCatalog organization remains the cloud operational workspace after imported records are created or synchronized.

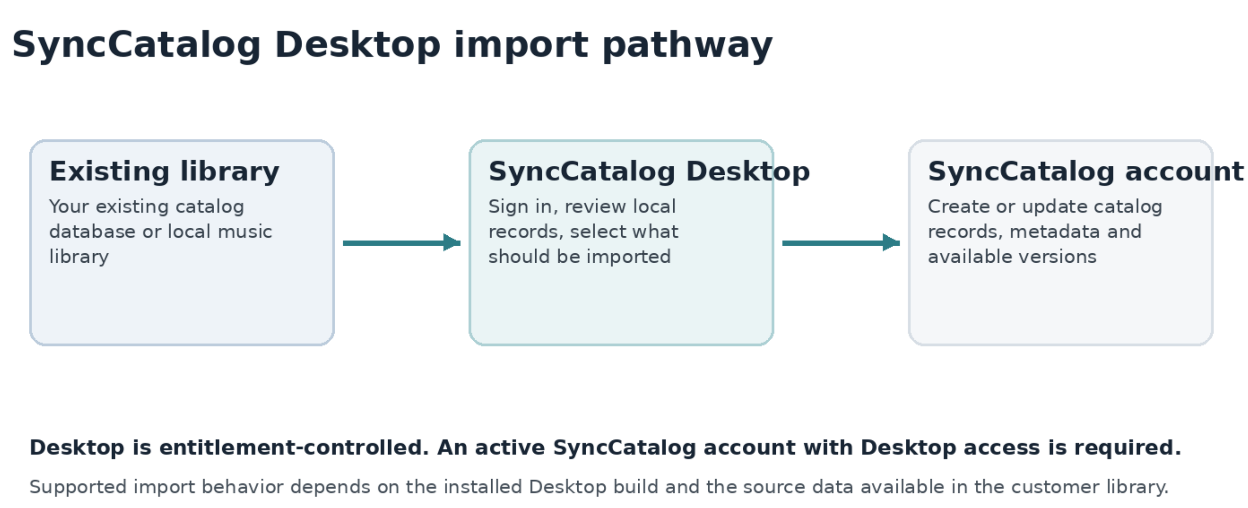


Figure 4. Desktop connects an existing catalog/library to the organization's SyncCatalog environment.

50. Desktop Sign-In, Entitlement and Import Workflow

1. Open SyncCatalog Desktop.
2. Sign in with the normal SyncCatalog account email and password.

3. Desktop verifies that the account has an active Desktop entitlement.
4. Open or connect the supported local database/library source.
5. Review local catalog records and select the tracks or records to import.
6. Confirm the metadata and available versions that should be sent to SyncCatalog.
7. Start the import/sync operation.

Desktop large-catalog behavior: Desktop is not subject to the browser Bulk Import 20-file selector. Large catalog selections can be queued for transfer and processed in controlled background work without requiring the user to break the catalog into 20-track groups.

8. Open SyncCatalog in the browser and review the resulting cloud records before treating them as pitch-ready.

SOURCE FORMATS VARY
The exact fields and source database formats available to Desktop depend on the installed build and the customer's local data. Do not assume a field can be imported if it is not present or readable in the source.

RIGHTS STILL REQUIRE VERIFICATION
Imported ownership, writer, publisher and clearance information is operational data. Importing it does not convert an unverified source database into legal clearance.

51. Settings → Integrations

Integrations are organization-level configurations managed by Owner/Admin on plans that enable external integrations. Provider configuration and encrypted credentials are stored separately.

1. Open Settings → Integrations.
2. Expand the provider.
3. Enter required configuration and credentials.
4. Enable and Save/Connect.
5. For providers with a live tester, run Test Connection.
6. To rotate a secret, enter the replacement value; leaving an existing secret blank keeps the stored credential where supported.
7. Disconnect/remove the provider when the organization should no longer use it.

CREDENTIAL HANDLING
Integration credentials are encrypted server-side and are not rendered back into settings pages. Raw provider responses are not retained as diagnostic dumps.

52. Integration Provider Reference

Provider	Category	Current behavior
OpenAI	AI	Active adapter for AI metadata. Connection tester implemented.
Anthropic	AI	Configuration-ready entry; not the active catalog AI adapter.
Google Gemini	AI	Configuration-ready entry; not the active catalog AI adapter.

Provider	Category	Current behavior
Daily	Video	Active video-meeting adapter. Connection tester implemented.
Twilio Video	Video	Configuration slot present; current meeting provider uses Daily.
Company SMTP	Email	Configuration slot; no active tester in the current tester service.
S3-Compatible Storage	Storage	Configuration slot; saving it does not automatically move ordinary catalog storage.
Twilio Voice	Voice / Call Center	Platform-managed provider used when Call Center is provisioned; not a standard self-service organization integration card.

53. OpenAI Integration

1. Add the OpenAI API key.
2. Optionally enter the default model if the deployment calls for one.
3. Enable the integration.
4. Save and Test Connection.
5. Once Connected, use Catalog AI Metadata workflows.

Provider charges follow the commercial arrangement in the organization or hosted deployment. Do not assume an external provider account includes unlimited usage unless the plan explicitly says so.

54. 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 and optional domain.
2. Enable and Test Connection.
3. From Team or a Calendar event, start a meeting and optionally enter a title.
4. SyncCatalog creates the provider room, stores an active meeting record and generates a random guest token.
5. Share the guest link when an outside participant should join without an internal account.
6. End the meeting from SyncCatalog when finished.

GUEST ACCESS
The public guest token is independent of the provider room name. Expired or ended meetings are not treated as permanent public pages.

PART VIII

Support, Communications & Administration

Customer support, public help, demos, hosted staff tools and the optional Call Center add-on.

55. Help & Support Tickets

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

1. Open Help & Support.
2. Choose New Support Ticket.
3. Enter a subject and describe the issue.
4. Submit; SyncCatalog creates a support reference and stores the first customer message.
5. Open the ticket later to read public replies and add another reply.

TICKET PRIVACY

Customer support tickets are private to the user who opened them. Internal staff notes are never shown to the customer.

56. Public Support and Sales Contact

Users who cannot sign in can use the public support path rather than needing access to the authenticated ticket system. The public support form is intended for account-access problems and other situations where the customer cannot reach Help & Support from inside the application.

Use the right contact path

Need	Recommended path
Signed-in customer support	Help & Support ticket inside SyncCatalog.
Cannot sign in / account access problem	Public Support form from the Support Center.
Sales, implementation or general product inquiry	Public Contact / Sales inquiry form.
Call Center inquiry	Contact Sales; Call Center is provisioned and priced by inquiry.

57. Knowledge and Ask SyncCatalog

Ask SyncCatalog is the hosted product assistant. It combines published product knowledge with limited, server-generated context from the screen the user is viewing. It is designed to explain product workflow and guide the user without making hidden changes.

Supported page-aware contexts

Context	Typical sanitized information	Example question
Track	Status, readiness blockers/warnings, rights-state flags, versions, deliverable availability	What would you fix first?

Context	Typical sanitized information	Example question
License Request	Status, track/version, project/use, territory/term/budget/deadline, linked CRM names	Where are we with this request?
Client	Status and counts/recent summaries for projects, tasks, pitches and requests	What is going on with this client?
Project	Status, type, deadline, client and related work counts	Anything I should pay attention to?
Pitch	Status, share state, track readiness, material requests, deliveries, recipient activity	Anything holding this pitch up?
Submission	Status, track summary, basic rights state, credits/deliverables and import state	What is missing before I accept this?

READ-ONLY DESIGN

Guided actions are server-approved navigation targets. Ask SyncCatalog does not directly mutate tracks, rights, pitches, CRM records, submissions or license requests.

DO NOT ENTER SECRETS

Do not enter passwords, API keys, payment-card data, authentication codes or other secrets into Ask SyncCatalog or ordinary support conversations.

58. Public Demonstration Mode

The public demo uses a designated demo account and read-only middleware. It is intended for product evaluation without risking production data changes. Browsing is allowed; mutation requests are blocked. Demo mode does not weaken tenant or role security for real users.

DEMO ADMINISTRATION CAN VARY

Temporary client demos and seven-day evaluation environments are hosted administrative functions and may be managed from the platform staff/admin area rather than from ordinary customer organization screens.

59. Hosted Platform Staff Workspace

Platform staff functions are separate from customer-organization permissions. They are used to operate the hosted SyncCatalog service and should not be granted to ordinary customer users.

- Support Inbox: customer tickets, public replies, internal notes, status, priority and assignment.
- Marketing / inquiry leads: website and sales inquiries when enabled.
- Staff meetings: internal meeting coordination for platform staff.
- Staff messaging: private platform-staff communication, including the floating movable message window where deployed.
- Staff files: operational file workspace where enabled.
- Calls & Voicemail: hosted staff call-center workspace for routed calls, voicemail and call follow-up.

60. SyncCatalog Call Center - Optional Paid Add-On

SyncCatalog Call Center extends SyncCatalog into business telephony. It is an optional paid add-on that is installed and configured after order. It is not automatically included merely because an organization has an active SyncCatalog subscription.

Provisioning model

1. The organization contacts SyncCatalog Sales and describes the required phone workflow.
2. SyncCatalog scopes the number type, departments, routing destinations, recording/transcription options and staff access.
3. The Call Center is installed and configured for that organization.
4. The customer-facing Call Center workspace appears only after the add-on is provisioned and enabled.
5. Setup, monthly service, telecom usage and AI/transcription usage can depend on configuration. Pricing is by inquiry.

Available capabilities

- Dedicated business or toll-free number
- Custom departments and call routing
- Forwarding to existing staff phones
- Live call transfers where configured
- Voicemail and call history
- Optional call recording with disclosure controls
- Automatic transcription
- AI-generated call summaries, outcomes and action items
- Follow-up flags and call completion workflow
- Secure role-limited access to recordings and transcripts

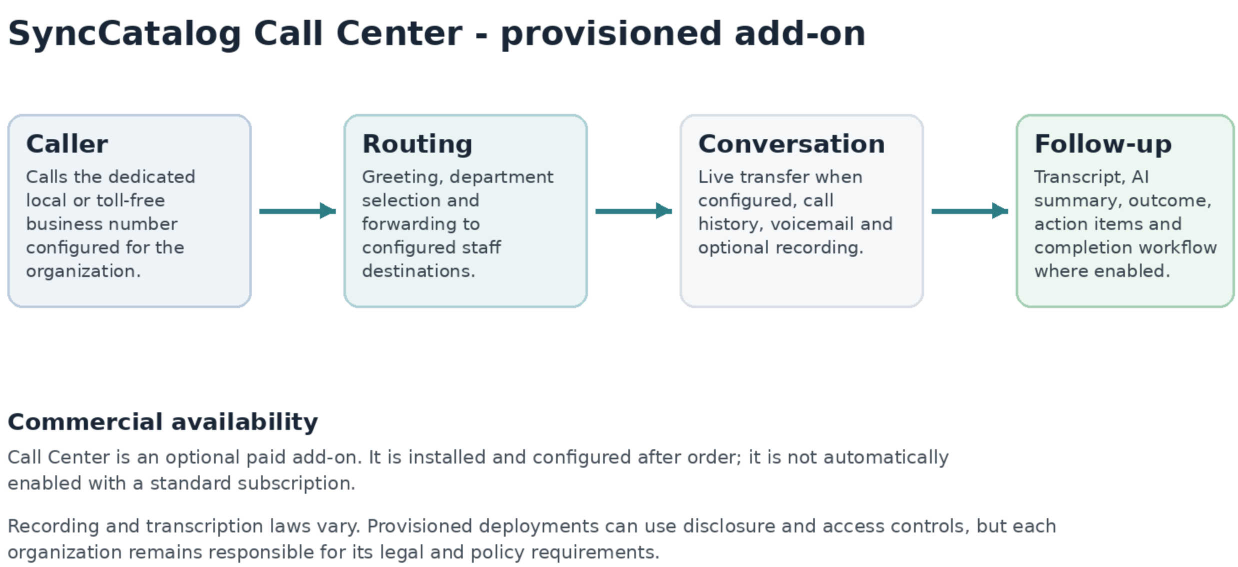


Figure 5. Call Center is provisioned on order and connects calling to structured follow-up.

61. Calls, Voicemail and Transfer Workflow

The exact customer Call Center layout is configured during provisioning. A typical workflow is:

1. Caller reaches the organization's dedicated number.
2. The greeting and department menu route the call to the configured destination.
3. If a staff member answers, the conversation proceeds and can be transferred when the configured deployment supports live transfer.

4. If the call is not answered, the caller can be routed to voicemail.
5. Call history records the operational state needed for staff follow-up.
6. Authorized staff review the call, mark it complete when handled, or reopen it if additional work is required.

ROUTING IS CUSTOMER-SPECIFIC
Do not assume every organization will use the same departments or destinations. Sales, Licensing, Support, Billing or other departments are configured to match the customer's operation.

62. Recording, Transcription and AI Call Logs

When recording and AI call logging are included in the provisioned Call Center configuration, the system can create a written operational record from answered calls and voicemail-related activity.

- Recording captures the authorized call audio according to the configured workflow.
- A transcription service converts supported recorded conversation audio to text.
- AI processing can generate a concise summary, outcome, action items and a follow-up-required flag.
- Multiple recording segments from a transferred call can be aggregated into the call log where the deployed workflow supports it.
- Staff should review the transcript and AI summary before relying on it for business action.

AI CAN MAKE MISTAKES
Transcripts and AI summaries are operational aids, not authoritative contracts, legal records or guaranteed verbatim transcripts. Important commitments should be confirmed in the organization's normal written records.

RECORDING LAW AND POLICY
Recording and transcription requirements vary by jurisdiction and use case. A configured disclosure does not replace legal review. Each organization remains responsible for applicable consent, retention, privacy and employment policies.

63. Platform-Administrator Functions

The following functions are not ordinary customer permissions. They appear only to SyncCatalog platform administrators or staff authorized for hosted operations.

- Manage the platform support inbox.
- Review website contact and sales inquiries where enabled.
- Administer demonstration environments and hosted service controls.
- Manage platform-staff meetings, internal messages and operational files where deployed.
- Operate the hosted SyncCatalog staff Calls & Voicemail workspace.
- Provision organization add-ons such as Call Center when sold and configured.
- Use platform-level subscription, billing, service-instance or infrastructure controls where the deployment exposes them.

PART IX

Security, Operations & Reference

Isolation, security notes, operating workflows, troubleshooting and current feature inventory.

64. Security Model

Tenant isolation

Organization data is scoped by organization_id throughout the application. Security tests verify that one tenant cannot view or mutate another tenant’s tracks, audio, submissions, license requests, pitches or related records.

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 existing sessions are logged out or blocked by active-user middleware. Public guest routes operate independently when intended.

File validation

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

Public-token security

Pitch Rooms and guest meeting access use long random tokens rather than sequential internal IDs.

Integration secrets

Third-party credentials are encrypted and are not rendered back into settings pages. Rotate provider-side credentials immediately if exposure is suspected.

AI assistant context isolation

Page-aware assistant context is assembled server-side after tenant-scoped record lookup and is intentionally sanitized. The assistant remains read-only.

65. Voice, Recording and Call-Log Security

Voice and call-log workflows require additional care because they can contain personal communication, recordings and transcripts. The hosted platform implementation validates provider callbacks, keeps credentials server-side and restricts staff access. A customer Call Center deployment should be treated as enabled only after its organization-specific provisioning is complete.

- Use role-limited access for call history, recordings and transcripts.
- Do not expose provider credentials or raw provider authentication data to customer browsers.
- Use trusted server-side media retrieval rather than distributing broad recording-storage credentials.
- Treat transcripts and summaries as sensitive business records and apply the organization’s retention policy.
- Review recording/transcription consent requirements for the jurisdictions and people involved.

66. Data Preservation and Backups

The hosted production environment is designed around recoverability, including recurring application/database backups and off-server backup capability. These are platform operations rather than customer-facing buttons.

BACKUP IS NOT VERSION HISTORY
A server backup is a disaster-recovery mechanism. It is not a substitute for careful status changes, rights documentation or maintaining authoritative contracts and source records.

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

1. Add the track manually, bulk-import the MP3, import an Accepted submission, or use Desktop for supported existing-library intake.
2. Confirm artist identity and core track fields.
3. Upload/verify Main audio and useful alternates.
4. Complete sync metadata and controlled tags.
5. Use AI suggestions only as creative metadata assistance.
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.
12. Expose publicly only if Public Catalog is enabled and the track should be public.

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

1. Submitter creates/signs into an artist account and accepts terms.
2. Submitter sends music, metadata and rights information.
3. Reviewer moves the submission through New → Listening → Shortlisted/Accepted/Declined.
4. If Accepted, an Owner/Admin/Catalog Manager uses Add to Catalog.
5. The imported catalog track begins as Draft and the original submission is preserved.
6. Catalog staff verify rights and imported metadata, add/replace audio as needed and complete readiness work.
7. Only after verification should the track be marked Catalog Ready/Sync Ready or used in pitches.

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

1. Create or open the CRM Client and Project.
2. Create a Pitch linked to that 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.
10. Create CRM tasks for follow-up and maintain project/pitch status as the opportunity evolves.

70. 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 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 deadline notifications for follow-up.
7. After actual agreements and approvals are complete, update to Licensed; otherwise use Declined or Closed.

71. 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
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

72. 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	✓	✓*	—	—	—

Action	Owner	Admin	Catalog Mgr	Sales	Reviewer
Change owner access	✓	—	—	—	—

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

73. Screen & Route Reference

Screen	Purpose	Typical path
Dashboard	Operational overview	/dashboard
Catalog	Catalog list/search	/catalog
New Track	Create track	/catalog/create
Track Editor	Edit a track	/catalog/{track}/edit
Browser Bulk Import	Up to 20 MP3s per browser request, metadata extraction, duplicate checksum handling	/catalog/import
Draft Review	Review Draft imports	/draft-review
AI Batch	Analyze up to 5 tracks	/catalog/ai-metadata/batch
AI Review	Review pending AI suggestions	/catalog/ai-metadata/review
AI Taxonomy	Controlled 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
Messages	Direct-message inbox	/messages
Notifications	Personal notification list	/notifications
Public Access	Catalog/submission switches	/settings/public-access
Integrations	Provider settings	/settings/integrations
Support	Authenticated support tickets	/support
Support Center	Published help/manual/public assistant	/support-center
Public Support	Sign-in/access help	/support/contact

Screen	Purpose	Typical path
Ask SyncCatalog	Floating assistant	Global launcher; contextual requests use /assistant/ask
Public Catalog	Public discovery	/browse
Public Artists	Public artist directory	/browse/artists
Public Track	Public track page	/browse/tracks/{track}
Public License Form	Public inquiry	/license/{track}
SyncCatalog Desktop	Existing library/database import companion; large selections are queued and are not limited by the browser Bulk Import 20-file request cap	Desktop application; no ordinary web route
Call Center	Provisioned organization add-on	Route/menu depends on provisioned deployment

74. Troubleshooting

Problem	What to check
A menu item is missing	Check organization role, plan and whether the feature/add-on is enabled.
Cannot add another track	The organization may have reached its plan track limit.
Browser Bulk Import rejects a file	Confirm it is a real MP3 and keep each browser upload request at 20 files or fewer. This browser request limit does not cap Desktop catalog migration.
Track does not appear publicly	Confirm Public Catalog is ON and the track is Sync Ready.
Pitch cannot be marked Ready	Every selected track must pass Pitch Readiness and at least one track must be included.
Pitch Room link returns not found	Token may be invalid/revoked, pitch may not be Ready/Sent or may have expired.
Accepted submission will not import	Use Owner/Admin/Catalog Manager and check track limits.
OpenAI analysis is unavailable	Verify plan, integration state, API key and successful connection test.
Video meeting will not start	Connect/test Daily and verify plan/role access.
A teammate cannot see my support ticket	Expected: customer tickets are private to the user who opened them.
Cannot message a coworker	Both users must be active same-organization members and the plan must include collaboration.
Public submissions are closed	Owner/Admin should check Settings → Public Access.
Forgot Password reveals nothing about the account	Expected anti-enumeration behavior; check the mailbox for an active registered account.
Ask SyncCatalog answers generally but not about the current record	Confirm you are on a supported Track, License Request, Client, Project, Pitch or Submission detail page.
Desktop will not sign in	Verify normal account credentials, active subscription and Desktop entitlement.

Problem	What to check
Desktop imported incomplete data	Review what existed in the local source and what the installed Desktop build supports; finish missing fields in SyncCatalog.
Call Center menu is missing	Call Center is a provisioned paid add-on and must be installed/enabled for the organization.
Call transcript/summary looks wrong	Review the recording and transcript; AI call logs can contain transcription or summarization errors.
Call routing reaches the wrong destination	Contact the organization administrator/SyncCatalog provisioning team to review department routing configuration.

75. 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	Rights in a specific sound recording.
Publishing	Rights in the underlying composition.
One Stop	Operational shorthand for a situation where 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.
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 completeness check with score, blockers and warnings.
Submission	Music sent by an external submitter for internal review.
Client / Project	CRM relationship and opportunity records connected to licensing work.
Tenant	A SyncCatalog organization boundary; one tenant cannot access another tenant’s data.
Context Card	Structured record reference attached to a Direct Message.
Approved Delivery	Exact file intentionally made downloadable to a Pitch Room recipient with protection/expiry/revocation.
Ask SyncCatalog	Read-only AI-assisted help interface with sanitized page-aware context on supported screens.

Term	Definition
SyncCatalog Desktop	Companion application for bringing supported existing library/database data into SyncCatalog.
Desktop Entitlement	Account/plan permission required for Desktop sign-in.
Call Center	Optional paid add-on, installed and configured on order for business calling and call follow-up.
AI Call Log	Transcript-derived call summary, outcome, action items and follow-up signal; requires review by staff.

76. Administrator Checklist

1. Confirm at least one Owner remains active.
2. Review Team membership and remove access no longer needed.
3. Review plan, seat, track and Desktop entitlements before onboarding a large batch.
4. Set Public Catalog and Public Submissions intentionally.
5. Configure only the integrations actually needed; rotate credentials when staff changes or compromise is suspected.
6. Test OpenAI before relying on AI metadata and Daily before scheduling video meetings.
7. Establish an internal standard for 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 unrestricted catalog file links.
11. For Desktop imports, review the resulting cloud records before pitching.
12. If Call Center is provisioned, review routing, recording/transcription policy, access and retention settings.
13. Review support/activity information regularly, but keep formal contracts and source rights documentation in the authoritative record system.

77. Feature Inventory: Current Build and Availability

Area	What it includes	State
Authentication	Login, active-user enforcement, reset, forced password change	Live
Submitter accounts	Registration, Artist Submit, My Submissions, terms	Live
Dashboard	Role-aware overview and shortcuts	Live
Catalog	Search/filter, create/edit tracks, statuses	Live
Artists	Directory and public artist pages	Live
Audio	Private MP3 storage/streaming, versions, waveform, technical metadata	Live
Browser Bulk Import	Up to 20 MP3s per browser request, metadata extraction, duplicate checksum handling	Live
Draft Review	Review incomplete Draft imports	Live

Area	What it includes	State
Sync Metadata	Tags/taxonomy/search descriptors	Live
AI Metadata	OpenAI suggestions, review, batch max 5	Live with connected OpenAI
Rights	Ownership/control/clearance/third-party issues/restrictions	Live
Writers/Publishers	PRO/IPI, splits, validation, reusable records	Live
Deliverables	Alternates/stems/WAV/etc. availability	Live
Pitch Readiness	Score, blockers/warnings, pitch gating	Live
Public Catalog	Browse/search/filter, artist/track pages, preview audio	Live
Public Access	Independent Public Catalog/Public Submissions switches	Live
License Requests	Public inquiry → internal queue/status/CRM/deadline	Live
Submissions	Review, protected audio, import to Draft catalog	Live
Pitches / Pitch Room	Pitching, secure room, playback, share/revoke	Live
Material Requests / Deliveries	Recipient request + controlled exact-file delivery	Live
CRM / Tasks / Calendar	Clients, contacts, projects, follow-up and time-based work	Live
Daily Meetings	Team/calendar video meetings and guest join	Live with connected Daily
Team / Notifications	Members, roles, invitations, activity and notifications	Live on eligible plans
Direct Messages	Inbox, floating messenger, contextual cards	Live on eligible plans
Ask SyncCatalog	Global assistant, page-aware context, guided navigation	Live in hosted build / provider-dependent
Support Tickets	Private customer support	Live
Public Support	Public access-help form for users who cannot sign in	Live
SyncCatalog Desktop	Existing library/database import companion; large selections are queued and are not limited by the browser Bulk Import 20-file request cap	Live for entitled accounts
Platform Staff Workspace	Support, staff tools, hosted operations	Platform staff only
Hosted Staff Calls & Voicemail	Routing, transfer, voicemail, recording and AI logs	Platform staff only
SyncCatalog Call Center	Dedicated number, routing, voicemail, recording/transcription, AI call logs	Optional paid add-on; provisioned on order
Public Demo	Read-only demo and exit flow	Live
Marketing / inquiry leads	Public inquiry administration	Platform admin / deployment-dependent

78. Configuration-Ready but Not the Active Workflow Adapter

Provider / entry	Current limitation
Anthropic	AI provider entry exists, but current catalog AI metadata workflow uses OpenAI.
Google Gemini	AI provider entry exists, but current catalog AI metadata workflow uses OpenAI.
Twilio Video	Video provider entry exists, but the current meeting provider selects Daily.
Company SMTP	Configuration fields exist; current integration tester does not provide an SMTP connection test.
S3-Compatible Storage	Configuration fields exist; saving them does not automatically switch ordinary catalog storage.
Twilio Voice for customer Call Center	Voice capability is provisioned by SyncCatalog when the add-on is ordered; it is not a self-service integration that should be assumed active from a settings card.

79. 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 the opportunity; pitches control what the recipient sees; approved deliveries control what the recipient can download; tasks, calendar, messages and meetings keep the team aligned; Desktop helps bring existing catalog data into the system; and support/security controls protect the workflow around it.

Where the Call Center add-on is provisioned, business calls can join that same operational model through structured routing, voicemail, transcripts, summaries and follow-up. Ask SyncCatalog remains a read-only guide over the underlying records rather than a replacement for them.

PRESERVE THE DISTINCTION

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

End of Manual

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