

LEADPILOT

LeadPilot AI Sales Assistant with Command Center by Code Creator

User Manual

From new inquiry to follow-up, pipeline visibility, and won-opportunity tracking - in one business workspace.

CODE CREATOR

AWS Marketplace deployment and operating guide

Important: This manual describes the shipped LeadPilot command center. It intentionally does not show or store your private SSH keys, SMTP passwords, API keys, or first-login token.

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How to use this manual

If you are launching LeadPilot for the first time, complete Section 2 first, then configure Settings before entering real leads. If LeadPilot is already running, Section 3 is the day-to-day operating guide. The manual uses the exact navigation names and behaviors validated in the shipped command center.

Best first-run order: Launch the EC2 instance -> connect by SSH -> obtain the first-login setup information -> create the Owner account -> configure AI -> configure email -> enter approved business context -> create your first real lead.

What this release does - and does not do

- LeadPilot can create and manage leads, AI-assisted drafts, outbound SMTP email, follow-up sequences, pipeline stages, notifications, revenue opportunity values, reports, and team access.
- Amazon Bedrock uses the EC2 IAM instance role. AWS access keys do not need to be stored in LeadPilot.
- SMTP can deliver approved outbound messages and follow-ups when SMTP mode is enabled.
- Incoming customer replies are not pulled automatically from the mailbox. Record replies manually in the Conversation section of the lead.
- Revenue screens represent recorded won opportunity value. They are not a bank feed, invoice ledger, or proof of collected cash.
- Archive is reversible. Permanent deletion is destructive and requires explicit confirmation.
- AI-generated content should be reviewed for accuracy, tone, pricing, policies, and commitments before it is sent unless your approved sending policy explicitly permits template auto-send.

1. Overview

LeadPilot is a sales follow-up and relationship command center designed for a salesperson, owner, or small team that needs one place to capture new business inquiries, understand what needs attention, prepare responses, follow up consistently, track movement through the sales pipeline, and record won opportunity value.

The goal is not to replace the salesperson. The goal is to make the next action obvious. LeadPilot brings the lead record, AI-assisted response, conversation history, follow-up plan, pipeline stage, notifications, and revenue context into the same workspace so that fewer opportunities are lost simply because someone forgot to respond or follow up.

1.1 Core sales workflow

Step	What LeadPilot helps you do
1. Capture	Create a lead with contact details, source, opportunity value, and the customer inquiry.
2. Understand	Use the inquiry and approved business context to create an AI relationship brief, AI score, next-step guidance, and draft response.
3. Review	Keep the human in control: review, rewrite, shorten, change tone, approve, or reject the response.
4. Send	Use SMTP for real outbound delivery, or TEST mode when you only want local recording.
5. Follow up	Enroll the lead in a follow-up sequence and work the follow-up queue.
6. Advance	Move the opportunity through New, Contacted, Engaged, Proposal, Won, or Lost.
7. Measure	Watch pipeline value, won opportunity value, conversion, activity, notifications, and reports.

1.2 The Command Center philosophy

The Command Center is designed to answer three questions quickly: What came in? What needs attention now? What is moving toward revenue? The top-level dashboard combines lead volume, follow-up needs, pending AI responses, pipeline value, won opportunity value, conversion, recent activity, and funnel stage counts.

Important interpretation: Waiting for reply lists open leads with a recorded outbound contact and no manually recorded customer reply. It is not a complete turn-by-turn reply tracker: once a reply is recorded, sending another message does not automatically return that lead to this filter.

2. Launch, Login, and AWS Setup

This section covers the infrastructure actions a customer or administrator typically performs after launching LeadPilot from AWS Marketplace. AWS console wording can change slightly over time, but the underlying steps are stable.

2.1 Before you launch

During the EC2 launch flow, make sure you have a key pair that you control. The private key is your SSH credential; AWS does not let you download the same private key again later. A Windows/PuTTY user can select or convert to a .ppk key, while OpenSSH commonly uses a .pem key.

Requirement	Recommended baseline
Key pair	Select a key pair you control and store the private key securely.
Public access	Use a subnet/public-IP configuration that lets you reach the instance, or provide your own private networking path.
Inbound TCP 80	Restrict TCP 80 to approved user IP ranges or an approved private access path. The shipped HTTP connection is unencrypted: passwords, setup tokens, provider credentials, and customer information are not protected in transit by HTTP. Use an approved encrypted access method before entering sensitive information over an untrusted network. HTTPS is not configured automatically.
Inbound TCP 22	Restrict SSH to the administrator's trusted public IP/CIDR whenever possible.
Outbound TCP 443	Needed for AWS Bedrock and other HTTPS provider/API access.
Outbound TCP 587	Common SMTP STARTTLS port; required for the Gmail configuration validated with LeadPilot.
Outbound TCP 465	Only if your SMTP provider uses implicit TLS on port 465.

Security note: Do not expose all TCP/UDP ports to the Internet. LeadPilot itself needs HTTP access on port 80 for the shipped direct-IP web interface, while SSH should normally be restricted to administrators.

2.2 Find the instance address

1. Open AWS Console -> EC2 -> Instances.
2. Select the LeadPilot instance.
3. Copy the Public IPv4 address or Public IPv4 DNS name from the instance details.

The browser address for the shipped direct-access configuration is:

```
http://<PUBLIC-IP>/
```

If the instance has no public address, use an approved private network connection. An Elastic IP is an alternative only when the subnet routing, Internet gateway, and security controls support public access; assigning the address alone does not establish connectivity.

2.3 Log on to the Ubuntu instance

The default operating-system username for this LeadPilot AMI is:

```
ubuntu
```

For OpenSSH, the connection pattern is:

```
ssh -i /path/to/your-key.pem ubuntu@<PUBLIC-IP>
```

For PuTTY on Windows: open PuTTY, enter the Public IPv4 address as the Host Name, use port 22 and SSH, select your .ppk private key under Connection -> SSH -> Auth -> Credentials, then connect and log in as ubuntu.

If SSH fails: Confirm the instance is running, EC2 status checks have passed, inbound TCP 22 allows your current public IP, the correct launch key is being used, and the username is ubuntu.

2.4 Get the first-login credentials

On first boot, LeadPilot creates installation-specific setup information on the instance. After you connect by SSH, display it with:

```
cat /home/ubuntu/FIRST_LOGIN.txt
```

Keep the contents private. Open the application using your approved access method. Enter your name, the Installation setup token from FIRST_LOGIN.txt, your email address, and a password of at least 12 characters. Click Create owner account. There is no shared default application login. The setup token is separate from your chosen sign-in password.

Do not share: Never paste the first-login token, private key, SMTP password, OpenAI API key, or other secrets into support messages, lead notes, or the “approved business context” fields.

2.5 Create an IAM role for Amazon Bedrock

LeadPilot can call Amazon Bedrock through the IAM role attached to the EC2 instance. This is the preferred AWS deployment method because the application does not need long-lived AWS access keys stored in its settings.

LeadPilot is not limited to Amazon Nova Pro. Use the following flexible starting policy if you want the instance to discover Amazon Bedrock models and inference profiles and invoke the model or profile selected in LeadPilot Settings. The selected model must still be available in the chosen AWS Region, enabled for your AWS account where required, and compatible with LeadPilot. Organizations that require stricter least-privilege access can later replace the wildcard resource with only the approved model and/or inference-profile ARNs.

```
{
  "Version": "2012-10-17",
  "Statement": [
    {
      "Sid": "DiscoverBedrockModelsAndProfiles",
      "Effect": "Allow",
      "Action": [
        "bedrock:ListFoundationModels",
        "bedrock:ListInferenceProfiles",
        "bedrock:GetInferenceProfile"
      ],
      "Resource": "*"
    },
    {
      "Sid": "InvokeSelectedBedrockModel",
      "Effect": "Allow",
      "Action": "bedrock:InvokeModel",
      "Resource": "*"
    }
  ]
}
```

Create the policy

1. Open AWS Console -> IAM -> Policies -> Create policy.
2. Choose the JSON editor and replace the sample content with the policy above.
3. Review and create the policy. A clear name such as LeadPilotBedrockPolicy is recommended.

Create the EC2 role

1. Open IAM -> Roles -> Create role.
2. Choose AWS service as the trusted entity and EC2 as the use case. This creates the trust relationship that allows EC2 to assume the role.
3. Attach the LeadPilotBedrockPolicy you just created.
4. Name the role, for example LeadPilotBedrockRole, and create it.

If a selected Bedrock model requires a one-time AWS Marketplace/model entitlement in your AWS account, an AWS administrator may need to enable that model before the instance can invoke it. For inference profiles, have the administrator authorize the chosen profile and required underlying models, including destination Regions, and review GetInferenceProfile requirements. LeadPilot does not use streaming inference. Model-access prerequisites and organization restrictions also apply. The validated LeadPilot workflow uses Amazon Bedrock without storing AWS access keys in the application.

2.6 Attach the IAM role to a running instance

1. Open AWS Console -> EC2 -> Instances.
2. Select the running LeadPilot instance.
3. Choose Actions -> Security -> Modify IAM role.
4. Select the LeadPilotBedrockRole (or your organization's equivalent EC2 instance profile).
5. Choose Update IAM role.

After the role is attached, verify that EC2 instance metadata access is enabled, IMDSv2 is required, and the metadata response hop limit is 2 for this container deployment. LeadPilot's containers use instance metadata to obtain temporary role credentials. Do not disable IMDSv2 or enter permanent AWS access keys as a workaround. Then return to LeadPilot -> Settings -> AI Provider and run a connection test. A reboot is normally not required just to attach the role.

One role at a time: An EC2 instance has one attached IAM role/instance profile at a time. If the instance already uses a role, incorporate the required Bedrock permissions into the approved role rather than accidentally replacing unrelated permissions.

2.7 Configure Amazon Bedrock in LeadPilot

1. Open LeadPilot -> Settings -> AI Provider.
2. Select Amazon Bedrock.
3. Set AWS Region. The validated baseline is us-east-1.
4. Click Discover Bedrock models if the model list is empty or you want LeadPilot to refresh text-capable model and inference-profile candidates for the selected Region. Discovery does not guarantee account access or compatibility.
5. Choose a candidate or enter a model/profile ID or ARN manually. Amazon Nova Pro (amazon.nova-pro-v1:0) was used during final validation, but it is not a product requirement. You may select another compatible Bedrock model or inference profile that your AWS account is authorized to use.
6. Click Save AI settings.
7. Click Test Connection. The test makes a small live provider request and may incur a small usage charge. A successful test displays an "AI connected" message, the selected Amazon Bedrock model and region, and "Connection verified with the selected model." After that succeeds, create a synthetic lead and generate a draft to verify the selected model can return the structured sales response LeadPilot requires.

Save before testing: LeadPilot expects changes to be saved before you run Test Connection. If the test fails, confirm the role is attached, the region/model are correct, model access is available in the AWS account, and outbound HTTPS is allowed.

2.8 Optional: keep a stable public IP with an Elastic IP

A normal EC2 public IPv4 address can change after a Stop -> Start cycle. If users bookmark LeadPilot by IP address, an Elastic IP provides a stable public address.

1. Open AWS Console -> EC2 -> Network & Security -> Elastic IPs.

2. Choose Allocate Elastic IP address and allocate the address in the appropriate network border group/Region.
3. Select the new Elastic IP -> Actions -> Associate Elastic IP address.
4. Choose the LeadPilot instance (or its primary network interface) and associate it.
5. Use the Elastic IP in the LeadPilot browser URL: `http://<ELASTIC-IP>/`.

AWS cost note: AWS charges can apply to public IPv4/Elastic IP resources. Review current AWS pricing and release unused addresses when they are no longer needed.

2.9 HTTP, HTTPS, and production exposure

The shipped LeadPilot AMI serves the application directly over HTTP on port 80. Restrict TCP 80 to approved user IP ranges or an approved private access path. The shipped HTTP connection is unencrypted, so sensitive information is not protected in transit by HTTP. An administrator may implement HTTPS using an approved TLS termination layer, but this requires deployment-specific configuration and validation of sign-in, setup, request-origin handling, forwarded headers, and secure cookies. This manual does not provide a validated HTTPS installation procedure.

3. User Operating Manual

The left-hand navigation contains: Command Center, Leads, Customers, Conversations, Follow-Ups, Pipeline, Revenue, Automations, Notifications, Reports, and Settings. The recommended first action after initial Owner setup is to configure Settings before entering real customer data.

3.1 Settings - configure LeadPilot before daily use

Settings is the control room for providers, approved business facts, automation rules, and team access. Configuration choices here affect the quality of AI drafts, whether email is actually delivered, and how much automation is allowed.

AI Provider

Control	What it does / how to use it
TEST - sample responses	Runs LeadPilot with sample/test AI behavior. Useful for orientation and demos. It is not a live external model connection.
OpenAI	Alternative live AI provider. Enter an API key and a model compatible with this integration's Responses API structured-output requests. Leave the key field blank to retain a configured key, then Save AI settings and Test Connection. Provider keys are sensitive; do not place them in business-context fields.
Amazon Bedrock	Recommended AWS-native path for Marketplace deployments. Uses the EC2 IAM role through the AWS SDK credential chain; no AWS access keys need to be stored in LeadPilot.
AWS Region	Region used for Bedrock calls. us-east-1 was used during final validation, but you may choose another Region where your desired model or inference profile is available and your IAM/account policies permit access.
Bedrock model / inference profile	The model or inference profile LeadPilot will call. Amazon Nova Pro (amazon.nova-pro-v1:0) was used during final validation, but LeadPilot is not restricted to that model. Select another compatible candidate returned by Discover Bedrock models, or enter a model/profile ID or ARN manually, then save and test it.
Discover Bedrock models	Lists text-capable model and inference-profile candidates for the selected Region. Discovery does not guarantee account access or Converse compatibility. Choose a candidate or enter a model/profile ID or ARN manually, save, and run Test Connection. Then generate a draft for a synthetic lead to verify the model can return the structured sales response LeadPilot requires.
Save AI settings	Stores the selected provider configuration.
Test Connection	Makes a small provider call to verify the saved configuration. A successful result is displayed with a timestamp.

LeadPilot's interface reminds you that AI-generated messages still require review. Treat generated text as a draft: verify names, dates, pricing, service commitments, policies, and claims before approval. Live AI generation sends the approved business context, inquiry, and recent recorded messages to the selected provider. Self-hosting LeadPilot does not mean live AI generation runs locally. TEST AI uses sample behavior without a live provider request.

Email Provider

Control	What it does / how to use it
TEST - record locally only	Records email activity inside LeadPilot but does not deliver email to the recipient. This is the safest mode for training and demos.
SMTP - deliver real email	Enables real outbound delivery through your mail provider.
SMTP host	Mail server hostname, for example smtp.gmail.com.
SMTP port	Common values are 587 for STARTTLS or 465 for implicit TLS. Use the value required by your provider.
Security	Choose STARTTLS or TLS to match the SMTP provider and port.
SMTP username	Account name used to authenticate to the SMTP server, often the sending email address.
SMTP password	Write-only secret. Leave the password field blank to retain the saved password; enter a replacement only when changing it. LeadPilot does not return the saved password through the API.
From email	Address recipients see in the From header, subject to your SMTP provider's rules.
From name	Friendly sender name displayed to recipients, for example "ABC Plumbing Sales".
Save email settings	Stores the provider configuration. SMTP credentials are encrypted at rest with this installation's private BOOTSTRAP_TOKEN. Save email settings before testing.
Test Connection	Checks SMTP connectivity and authentication without requiring you to send a customer message.
Send Test Email	Delivers a real test message to the signed-in LeadPilot account when SMTP is configured. Verify receipt in the inbox or spam folder.

Gmail example

A Gmail configuration validated with LeadPilot uses smtp.gmail.com, port 587, STARTTLS, the Gmail address as the username, and a Google App Password rather than the normal Google password. Google App Passwords require 2-Step Verification and may be unavailable because of account or security policy. If unavailable, ask your mail administrator for a supported SMTP configuration; do not use your normal Google password or weaken account protection. LeadPilot does not provide Sign in with Google. Keep any App Password private.

Outbound-only behavior: LeadPilot can send through SMTP, but this release does not automatically read the mailbox. When a customer replies, open the lead and use “Record customer reply (manual entry)” so the conversation and lead state reflect the reply.

If you want to remove the stored SMTP password, follow the interface instruction to switch away from SMTP first, then remove the saved password.

Your approved business context

This section is the AI grounding profile for the customer’s business. It is intentionally separate from provider credentials. The more accurate these facts are, the more useful and safer AI drafts become.

Field	Purpose
Business Name	Official or customer-facing business name the AI may use.
Industry	Industry or trade context that helps the AI understand the type of inquiry.
Phone	Approved business phone number that may be included in replies.
Website	Approved website address.
Service Area	Cities, counties, territories, or regions the business actually serves.
Hours	Approved operating hours or availability information.
Tone	Preferred writing voice, such as friendly, concise, professional, or consultative.
Owner Email	Approved owner/business email used for business context and notifications as applicable.
Description	Short explanation of what the company does and who it serves.
Services	Services/products the AI is allowed to reference.
Signature	Preferred closing/signature for outbound drafts.
FAQs	Approved answers to common customer questions.
Pricing	Only pricing guidance the business has approved the AI to use.
Policies	Cancellation, scheduling, service, warranty, deposit, or other approved policies.
Instructions	Special instructions, restrictions, wording guidance, or facts the AI must follow.

Do not put secrets here: Never enter provider passwords, SMTP passwords, API keys, private keys, or first-login tokens in the approved business context.

Automation and sending policy

Click Save settings in Your approved business context after changing business facts, automatic follow-up selection, Sending policy, alert thresholds, or owner notification settings. Save AI settings and Save email settings apply only to their respective provider panels.

Setting	Meaning
---------	---------

Setting	Meaning
Automatic follow-up after initial delivery	Choose Manual enrollment or an enabled sequence under Automatic follow-up after initial delivery. A selected sequence can be enrolled after an initial message is sent or recorded as Test sent, provided the lead is open, has no recorded reply, and has no previous enrollment.
Manual enrollment	Selecting Manual enrollment leaves enrollment to the user; LeadPilot will not automatically enroll every lead.
AI Draft Only	AI prepares content but does not send it automatically.
Approval Required	A human must approve outbound content before delivery.
Approved Auto-Send (templates only)	Allows approved template-based messages to be sent automatically under the configured rules; free-form AI output should not be treated as unrestricted auto-send.
Uncontacted alert after hours	Sets how long a lead can remain uncontacted before LeadPilot raises an attention item.
High-value opportunity threshold	Defines the opportunity value above which LeadPilot treats a lead as high-value for visibility/alerts.
Email owner notifications	Enables owner notification emails when outbound email is configured.

Team access

Owners and Administrators can view Team access. Only an Owner can use Add user and enable or disable other accounts. Add user requires a name, email, initial password of at least 12 characters, and role. Owners, Administrators, and Sales users can approve messages; Staff can perform ordinary lead work but cannot approve messages; Viewers are read-only. Archive, restore, and permanent deletion require Owner or Administrator access. No invitation-email workflow is implemented.

3.2 Command Center

Command Center is the executive operating screen. It is designed for a fast scan at the beginning of the day and between sales calls. The screen refreshes periodically and brings together pipeline, attention items, activity, and performance.

Area	What to look for
Responses ready for review	AI-generated responses waiting for a human decision.
Follow-ups need attention	Scheduled or due follow-up work requiring action.
Open Pipeline	Current opportunity value still in active pipeline stages.
Leads Today	New lead count for the current day.
Follow-ups Due	Count of follow-up actions currently due.
Revenue Won	Recorded value of opportunities marked Won.
Conversion Rate	Won opportunities relative to closed opportunities as presented by LeadPilot.

Area	What to look for
Needs your attention	Actionable notifications such as a response ready for approval.
Revenue momentum	Recent won-opportunity trend across the displayed period.
Live lead activity	Recent activity such as new leads, AI responses, provider tests, and other workflow events.
Your sales funnel	Counts by New, Contacted, Engaged, Proposal, Won, and Lost.
Summary tiles	Quick counts for new customers, AI responses, awaiting approval, hot leads, leads at risk, and opportunities won.

3.3 Leads - the working record for every opportunity

Leads is one of the most important pages in LeadPilot because it is the working inventory of opportunities. A clean lead record gives the AI better context, makes follow-up more reliable, and keeps the pipeline and revenue screens meaningful.

New Lead fields

Name, Email, and Inquiry are required. Click Capture lead to save. LeadPilot queues an initial AI draft automatically; review that result before requesting another draft.

Field	What to enter and why it matters
Lead / customer name	Person or business name. This becomes the primary label across Leads, Pipeline, Conversations, and notifications.
Company	Optional company name; also used by lead search.
Email	Primary email used for outbound communication. Confirm it before sending real email.
Phone	Optional contact number for the relationship record and manual outreach.
Source	Where the opportunity came from, such as Website. Source data helps you understand which channels create opportunities and won value.
Owner	Optional free-text ownership label. It does not create a user or restrict access to the lead.
Opportunity value (USD)	Estimated opportunity value in US dollars; not collected cash. This feeds open-pipeline value and, when Won, the revenue opportunity views.
Inquiry	The customer's request or reason for contacting you. This field is required because it drives the AI brief, AI score/priority context, next-step guidance, and draft response.

Why Inquiry is required: LeadPilot is designed around the actual customer need. A lead without an inquiry gives the AI too little context to create a useful relationship brief or response.

Lead list and filters

The Leads list can be filtered with All leads, New, Hot, Needs follow-up, Waiting for reply, Won, Lost, and Archived. The table shows the lead/customer, source, status, value, AI score, and next follow-up.

Filter	Use it for
All leads	Normal active lead inventory. Archived records are intentionally excluded.
New	Fresh opportunities that have not yet progressed.
Hot	Leads LeadPilot currently flags as higher priority.
Needs follow-up	Leads with follow-up work that needs attention.
Waiting for reply	Open leads with a recorded outbound contact and no manually recorded customer reply. Once a reply is recorded, sending another message does not automatically return the lead to this filter.
Won	Closed opportunities recorded as won.
Lost	Closed opportunities recorded as lost.
Archived	Leads intentionally hidden from normal sales views while preserving their history.

Lead detail page

Open a lead to work the relationship. The detail page combines the customer's identity, opportunity value, source, ownership, tags, age/contact information, current stage, AI assistance, conversation, notes/tasks, and lead-management controls.

Area	How to use it
Status dropdown	Select New, Contacted, Engaged, Proposal, Won, Lost, or Follow-Up. Keep the stage current so Pipeline and conversion data remain useful.
Update	Saves the selected status and opportunity value.
Save notes	Saves internal notes separately from status and opportunity value.
AI relationship brief	Summarizes the inquiry in a relationship-oriented way so a salesperson can understand the situation quickly.
Next step	Suggests a practical next action. Treat it as guidance, not an instruction that overrides business judgment.
Draft / Rewrite / Shorter / Friendlier / Professional / Follow-up / Summary / Next-action	Choose an AI operation, then click Generate AI response. Each successful operation creates another reviewable outbound draft and updates the relationship brief, score, and next step. It does not replace or automatically reject an earlier draft. Unsaved edits in a message textarea are not submitted to this AI action.

Area	How to use it
Generate AI response	Creates another reviewable outbound draft from the inquiry, recent recorded messages, and approved business context using the selected AI provider.
Follow-up sequence / Enroll	Adds the lead to a configured follow-up sequence.
Conversation	Shows outbound drafts/messages and manually recorded inbound replies in chronological context.
Approve & send	Approves a pending outbound message and, when SMTP is enabled, delivers it through the configured SMTP provider.
Reject	Rejects a pending outbound draft instead of sending it.
Record customer reply (manual entry)	Adds the customer's incoming reply to the conversation. This is required because inbound mailbox synchronization is not automatic in this release.
Notes & tasks	Enter internal notes and click Save notes. To create a task, enter New task and a Task due date, then click Add. Use the task checkbox to mark it complete. Archived records must be restored before these controls can be used.
Lead management	Contains Archive, Restore (when archived), and Delete permanently for privileged users.

AI score

The AI score is a prioritization aid shown with the lead. Use it together with the customer inquiry, value, urgency, relationship context, and your own sales judgment. It is not a promise of conversion or a substitute for qualification.

3.4 Customers

Customers lists non-archived records marked as customers. Marking a lead Won automatically marks it as a customer. Changing its stage later does not automatically clear that customer designation. Other prospects remain in Leads.

Keep the distinction clear: Leads is the working opportunity queue. Customers is the relationship-oriented view. Pipeline is the stage view. Revenue is the won-value view.

3.5 Conversations

Conversations centralizes the message history LeadPilot knows about. Open a conversation row to review the message in its lead record. Approve & send queues the message for processing. Sent means the SMTP server accepted it; it does not prove inbox placement or that the recipient read it. Test sent means it was recorded locally without external delivery. Customer replies that you manually record appear as received messages so the relationship history stays complete.

- Review pending messages before sending.

- Use the message subject and body to confirm the AI did not invent pricing, dates, guarantees, or policies.
- If a customer replies in your external inbox, open the lead and record the reply manually. This keeps Waiting for reply, notifications, and relationship context accurate.

If a message shows Uncertain or an interrupted-delivery warning, check the mail provider before generating or sending a replacement to avoid duplicates.

3.6 Follow-Ups

Follow-Ups lists sequence enrollments with Lead, Sequence, Step, Next due, and Status. It can include future, stopped, and completed enrollments, not just work currently due. Open a lead to review it, or use Stop on an active enrollment to stop it and cancel its pending, draft, or queued sequence messages.

The page is empty when there are no enrollment records to display. Having nothing currently due does not by itself make the Follow-Ups page empty.

3.7 Pipeline

Pipeline is the sales-stage view. Opportunities are grouped into New, Contacted, Engaged, Proposal, Won, and Lost. Cards show the lead/customer and key context such as source, value, age, and AI score. Open a card to work the lead and update its stage. Leads with the Follow-Up status appear in the Contacted column.

Stage	Practical meaning
New	Inquiry received; relationship has not meaningfully progressed.
Contacted	You have made or recorded initial outreach.
Engaged	The customer is actively interacting with you; for example, a reply has been recorded.
Proposal	A proposal/quote/offer stage is underway.
Won	Opportunity closed successfully. Its recorded value contributes to won-opportunity revenue reporting.
Lost	Opportunity closed without a sale.

3.8 Revenue

Revenue summarizes opportunity value, especially opportunities marked Won. It can show this month's won value, total won value, average sale, source-based contribution, and follow-up influenced value. All amounts are displayed in USD. Today and month-based reporting use UTC boundaries. Follow-up influenced is the won value of opportunities with a follow-up recorded as Sent or Test sent before the win; it does not prove that AI or follow-up caused the sale. Archived leads are excluded. Use Revenue as a sales-performance view, not as an accounting system.

Revenue definition: LeadPilot revenue is the value recorded on won opportunities. It does not confirm that an invoice was sent, payment was received, funds cleared, or taxes were handled.

3.9 Automations

Automations is where follow-up sequences are defined and their activity is reviewed. A sequence can contain timed steps - for example, a template follow-up after a delay - and can require approval depending on your sending policy.

An Owner or Administrator selects New sequence, enters a name, and configures up to three steps in the interface. Step 1 is required. Each step has Hours after previous delivery / enrollment, Approved template or AI drafting guidance, Generate AI draft (always reviewed), and Require approval. The first delay runs from enrollment; later delays run from the previous recorded delivery. Templates support {{name}}. Use Save sequence, then enroll a lead. Pause sequence suspends processing; Enable sequence permits processing again.

Active sequences stop when a customer reply is manually recorded or the lead is marked Won, Lost, or archived. Archive does not recall email already sent or necessarily interrupt delivery already in progress.

Template auto-send requires Sending policy = Approved Auto-Send (templates only), Generate AI draft unchecked, and Require approval unchecked for that step. AI-generated messages still require approval. AI Draft Only prevents automatic sending, but an authorized user can still explicitly Approve & send.

Automation safety: Do not use aggressive or high-frequency follow-up simply because automation makes it possible. Follow your business rules, customer expectations, applicable law, and email-provider policies.

3.10 Notifications

Notifications retains event history and shows the owner-email state. Use View lead to open the related record and Mark read to acknowledge an unread notification. The Command Center's Needs your attention list filters unresolved items, so it need not match the full Notifications history. Owner emails use Owner Email in Settings; enabling notifications does not resend notifications already marked Disabled.

If Email owner notifications is enabled and SMTP is configured, eligible owner notifications can also be delivered by email according to the configured behavior.

3.11 Reports

Reports displays recent business activity. Export leads CSV downloads up to 10,000 non-archived leads, newest first, with Name, Email, Source, Status, Value, Created, and Won fields. It does not export conversations, tasks, or the complete audit history. The displayed activity history is limited to the latest 500 records.

Exports reflect the LeadPilot records and values you entered. They should be reviewed before being used for accounting, compliance, or other systems of record.

4. Recommended Day-to-Day Workflow

The following workflow keeps LeadPilot useful and prevents the dashboard from becoming a collection of stale statuses.

1. Start at Command Center. Review “Needs your attention,” responses awaiting approval, follow-ups due, and new lead activity.
2. Open each new lead. Confirm contact details, inquiry, source, and opportunity value.
3. Review the AI relationship brief, AI score, and suggested next step. Review the inquiry and approved business context before relying on the AI result. The current lead interface does not provide general editing of existing contact fields or the inquiry. Correct editable business context in Settings and review the outbound message carefully.
4. Generate or refine the outbound response. Choose Draft, Rewrite, Shorter, Friendlier, Professional, Follow-up, Summary, or Next-action from the AI operation dropdown, then click Generate AI response. Each successful operation creates another reviewable draft; it does not overwrite an earlier one.
5. Review the exact outbound message. Approve & send only when the content is accurate and the intended recipient is correct.
6. If follow-up is appropriate, enroll the lead in the right follow-up sequence.
7. When the customer replies in your external mailbox, record the reply manually in the LeadPilot Conversation area.
8. Move the lead stage as the relationship progresses: New -> Contacted -> Engaged -> Proposal -> Won/Lost.
9. For Won opportunities, confirm the recorded value is the opportunity value you want represented in Revenue and Reports.
10. Archive stale/test/duplicate records when you want them out of normal sales views without destroying history. Permanently delete only when destruction is intentional.

4.1 Archive, restore, and permanent delete

Action	What happens
Archive lead	Removes the lead from normal Leads, Customers, Pipeline, Revenue, Command Center metrics, and CSV views while preserving its history in Archived. Archiving also stops follow-up activity and cancels unsent drafts/queued messages associated with that lead.
Restore lead	Removes the archive state while retaining the previous sales stage. It does not restart stopped enrollments, restore cancelled messages, or reset previously read notifications. Review the record and explicitly enroll it again if appropriate.
Delete lead permanently	Deletes the lead and its related operational records. LeadPilot requires typing DELETE to confirm. This is intentionally difficult to do by accident.

Permanent deletion removes lead-related conversation/messages, tasks, enrollments, notifications, AI logs, and lead-linked activity. A generic deletion audit event may be retained without the deleted lead's personally identifying information.

Recommended practice: Archive first when you are uncertain. Permanent deletion is for records you are sure must be destroyed.

4.2 Sending-policy recommendations

For a new installation, the safest operating posture is AI Draft Only or Approval Required. This keeps a salesperson responsible for the final message while still gaining the speed of AI drafting. Template auto-send requires Sending policy = Approved Auto-Send (templates only), Generate AI draft unchecked, and Require approval unchecked for that step. AI-generated messages still require approval. AI Draft Only prevents automatic sending, but an authorized user can still explicitly Approve & send.

5. Troubleshooting and Administrator Quick Checks

5.1 The browser does not load LeadPilot

- Confirm the EC2 instance is Running and has passed status checks.
- Confirm you are using the current Public IPv4 address. A normal public IP can change after Stop -> Start.
- Confirm inbound TCP 80 is allowed to your browser/network.
- If you use an Elastic IP, confirm it is still associated with the correct instance/network interface.
- SSH to the instance and run the service checks in the Appendix.

5.2 Bedrock Test Connection fails

- Confirm an EC2 IAM role with the required Bedrock permissions is attached to the instance. Also verify EC2 metadata access is enabled, IMDSv2 is required, and the metadata response hop limit is 2 so the containers can obtain temporary role credentials.
- Confirm the selected AWS Region and model/profile are available to the AWS account.
- Click Discover Bedrock models, select the model again if necessary, then Save AI settings before testing.
- Confirm outbound TCP 443 is allowed.
- If the model requires a one-time entitlement/subscription, have an AWS administrator enable it.

5.3 SMTP Test Connection fails

- Confirm the SMTP hostname, port, and security mode match the mail provider.
- Confirm outbound TCP 587 for STARTTLS or TCP 465 for implicit TLS is allowed as required by the provider.
- For Gmail, use a current App Password when the Google account supports App Passwords; do not use the normal Google account password.
- If a saved SMTP password was revoked, enter the replacement password, save, and test again.

If a message shows Uncertain or an interrupted-delivery warning, check the SMTP/mail provider before generating or sending a replacement. This safeguard helps avoid accidental duplicate delivery.

5.4 A customer replied, but LeadPilot still says Waiting for reply

Incoming mailbox synchronization is not automatic. Open the lead, find Conversation, enter the customer's message under "Record customer reply (manual entry)," and save it. This updates the relationship record and allows the workflow to reflect that the customer responded.

5.5 An archived lead seems to be missing

Archived records disappear from normal sales views by design. Open Leads and choose the Archived filter. Open the record from there if you need to Restore it or Delete it permanently.

5.6 The public IP changed after maintenance

This is normal when using an automatically assigned EC2 public IPv4 address and performing a Stop -> Start cycle. Use the new public IP, or assign an Elastic IP if you want a stable address.

Appendix A. Administrator Quick Reference

These commands are intended for the EC2 administrator. Run them after connecting as ubuntu.

A.1 Display first-login setup information

```
cat /home/ubuntu/FIRST_LOGIN.txt
```

A.2 Check LeadPilot system services

```
sudo systemctl is-active docker codecreator-identity codecreator-automation
```

Expected service state: active for all three units. The identity and automation units are oneshot services that remain active after completing their commands; this alone does not prove the application is healthy. Also check container status and run healthcheck.sh. The migration container may have exited successfully after completing its work.

A.3 Check application containers

```
leadpilot_dir="$(systemctl show codecreator-automation.service --property=WorkingDirectory --value)"
if [ -n "$leadpilot_dir" ] && [ -f "$leadpilot_dir/docker-compose.yml" ]; then
(
    cd -- "$leadpilot_dir" || exit 1
    sudo docker compose ps
    sudo bash scripts/ubuntu/healthcheck.sh
    sudo cat .instance-id
)
else
    printf '%s\n' 'LeadPilot installation directory could not be verified.'
fi
```

A healthy installation should show the API, frontend, Nginx, PostgreSQL, Redis, and worker containers running; API/PostgreSQL/Redis report healthy, and Nginx exposes port 80.

A.4 Confirm installation identity

```
leadpilot_dir="$(systemctl show codecreator-automation.service --property=WorkingDirectory --value)"
if [ -n "$leadpilot_dir" ] && [ -f "$leadpilot_dir/docker-compose.yml" ]; then
(
  cd -- "$leadpilot_dir" || exit 1
  sudo docker compose ps
  sudo bash scripts/ubuntu/healthcheck.sh
  sudo cat .instance-id
)
else
  printf '%s\n' 'LeadPilot installation directory could not be verified.'
fi
```

The identity file should normally contain this EC2 instance's ID. A mismatch or a host- fallback requires administrator investigation. Do not edit or delete the identity file to bypass the guard.

A.5 Direct browser URL

```
http://<PUBLIC-IP>/
```

A.6 Common network ports

Port	Direction	Purpose
80/TCP	Inbound	LeadPilot direct HTTP web interface. Restrict to approved users or a private access path; HTTP is unencrypted.
22/TCP	Inbound	SSH administration; restrict to trusted administrator IPs.
443/TCP	Outbound	Bedrock/OpenAI and HTTPS API traffic.
587/TCP	Outbound	SMTP STARTTLS, including the validated Gmail SMTP configuration.
465/TCP	Outbound	Optional SMTP implicit TLS if required by the selected mail provider.

A.7 Persistence, backup, and template safety

Application data is stored in persistent Docker volumes and normally survives container recreation, reboot, and EC2 Stop/Start while the underlying storage is retained. This is not a backup.

The supplied backup.sh briefly pauses the API and worker and saves a database backup, installation environment, and Nginx configuration. Protect backups as secrets and customer data, and copy them to access-controlled storage outside the instance.

Retain the matching installation environment, including BOOTSTRAP_TOKEN, with protected backups because saved provider credentials depend on it. Do not delete or rotate it casually. Restore requires administrator review and replaces business data.

Do not run prepare-template.sh or remove Docker volumes on an initialized customer instance. Template preparation deliberately erases application database and queue data and removes installation identity and credentials. It is reserved for approved disposable AMI-build instances.

Appendix B. Official AWS References

AWS console labels and capabilities can evolve. For the latest AWS-side procedures, use the official documentation below.

- [Connect to your Linux instance using SSH](#)
- [Create and manage EC2 key pairs](#)
- [Attach an IAM role to an EC2 instance](#)
- [Amazon Bedrock IAM policy examples](#)
- [Amazon Bedrock model access](#)
- [Associate an Elastic IP address with an instance](#)

Appendix C. Operating Reminders

Remember	Why
Configure Settings before using real leads.	AI and email behavior depends on the provider and approved business context.
Keep secrets out of business context and notes.	Provider credentials belong only in their protected provider fields or AWS IAM, not in sales data.
Record inbound replies manually.	There is no automatic mailbox ingestion in this release.
Review AI-generated content.	AI can help with speed and consistency, but the salesperson owns accuracy and commitments.
Revenue means won opportunity value.	LeadPilot is not a payment processor or accounting ledger.
Archive before delete when unsure.	Archive is reversible; permanent deletion is destructive.
Use an Elastic IP if a stable IP matters.	A normal EC2 public IPv4 address can change after Stop -> Start. Elastic IP use still requires correct subnet routing, Internet gateway, and security controls.

LeadPilot AI Sales Assistant with Command Center by Code Creator

Built to help turn timely follow-up into stronger customer relationships and more visible sales execution.