

PostingPilot User Manual

Complete feature reference

Version 1.5 · postingpilot.app/docs

This manual covers every area of the app, screen by screen. If you are setting up for the first time, start with the Quick Start Guide instead.

Contents

1. Overview
2. Workspaces
3. Voice profiles
4. Topics and the idea inbox
5. Post editor
6. Media studio
7. Planner and calendar
8. Channels and publishing
9. Analytics and intelligence
10. Client portals and reports
11. Settings and branding
12. Plans, trials and billing
13. Notifications
14. Team members and roles
15. Research: patterns, trends and scoring
16. Engagement metrics
17. Campaigns, experiments and links
18. Bulk operations and data portability
19. Agency operations
20. Help, status and support
21. Troubleshooting

1. Overview

PostingPilot turns an idea into a published social post: it generates topics, drafts them in your writing voice, creates images, carousels and video, publishes them directly to your connected channels, then reports on what performed.

New here? Open the guided setup wizard at Setup wizard in the app. It walks you through connecting a channel, training your voice, writing a first draft and scheduling it, and shows a live connection health panel so you know each channel is authenticated before you publish.

- Start: Setup wizard, onboarding checklist, guided tour.
- Create: Topics, Post editor, Media, Carousels, Video, Templates.
- Plan: Planner, Calendar, Idea Inbox, Recycle, Bulk scheduling.
- Publish: Channels, Retries, Delivery history, Notifications.
- Analyse: Insights, Intelligence, Patterns, Trends, Health, Traffic, Usage.
- Manage: Workspaces, Members and roles, Brand kit, Settings, Client portals, Reports, Billing.

2. Workspaces

A workspace represents one brand or client. Everything is scoped to it: topics, posts, voice profiles, brand kit, channels, stored API keys, metrics and portals. Nothing is shared across workspaces unless you explicitly export and import it.

- Switch workspaces from the selector in the top bar. The whole app re-scopes immediately.
- Create one workspace per client so reporting and credentials stay separate.
- The number of workspaces available depends on your plan tier.

3. Voice profiles

The voice profile is what makes drafts sound like the author rather than a generic assistant. It is built from writing samples plus explicit trait settings, and distilled into a reusable instruction set.

- Samples: paste 3-5 representative pieces. Replace them as your style evolves.
- Traits: formality, humour, emoji use, sentence rhythm, hook style, CTA style.
- Guardrails: banned words, phrases and claims the AI must never produce.
- Test drive: enter a topic and compare a plain draft against the voice-matched draft.
- Version history: every save is versioned; revert at any time.
- Transfer: export a profile as a validated file and import it into another workspace.

Tip: If drafts feel flat, the usual cause is too few samples or samples that are unusually polished compared with how you normally post.

4. Topics and the idea inbox

Topics are the queue that feeds drafting. They can be generated, imported or captured on the go.

- Topics: describe your niche and audience, generate a batch, keep or discard each idea.
- Idea Inbox: capture ad-hoc ideas, including from your phone via the installable app.
- Batch import: paste article or blog URLs to turn source material into draft suggestions.
- RSS: subscribe a feed so new items arrive as suggestions automatically.
- Deduplication: near-duplicate articles across sources are merged into the existing idea rather than creating clutter.

5. Post editor

- Draft in voice: generate the post body from a topic, then edit freely.
- Hook variations: generate alternate opening lines and pick the strongest.
- Platform variants: adapt one post to the length and tone conventions of each network.
- Media: attach a generated image, a branded carousel or a video clip.
- Destination: a badge shows which connected channel will receive this post type, based on your routing rules.
- Repurpose chain: turn a published post into a thread, carousel or short video.
- Manual export: copy platform-formatted text (with thread splitting and character limits) if you want to post somewhere by hand.

6. Media studio

- Images: generate visuals from a prompt; prompts can be suggested alongside the draft.
- Carousels: render multi-slide posts using your brand kit colours, fonts and logo.
- Video: AI text-to-video clips and branded motion-graphic cards, with live progress, logs and a retry button if a render fails.
- Media library: reuse previously generated or uploaded assets across posts.
- Brand kit: set logo, colours and fonts once so every rendered asset stays on brand.

Video renders run on a third-party provider and can take several minutes. Progress updates arrive live; you can leave the page and come back.

7. Planner and calendar

The planner is where a pile of drafts becomes a schedule. It compares your intended cadence with what is actually scheduled and highlights the gaps.

- Gap filling: the planner proposes topics, drafts and image prompts for empty slots.
- Drag and drop: move cards between days and slots; edit times inline.
- Undo/redo: revert accidental moves and time edits, including with keyboard shortcuts.
- Channel multi-select: choose exactly which active channels each card publishes to.
- Status column: each card shows scheduled, sent or failed with timestamps.
- Delivery details: open any sent card to inspect the raw delivery payload and error history.
- Calendar view: a month/week view of scheduled and published posts, where you can reschedule or cancel items.

8. Channels and publishing

PostingPilot publishes directly to your connected social channels - there is no third-party scheduler in between. You connect each channel yourself, so platform permissions stay under your control.

- LinkedIn: text and link posts to your member profile.
 - Facebook Pages: requires a Meta access token and the Page ID on the channel.
 - Instagram Business: requires a Meta token, the Instagram Business account ID, and every post must include an image.
 - YouTube: video uploads with title, description, tags, category, privacy (public, unlisted, private) and a thumbnail (uploaded file or a frame from the video).
 - X (Twitter): posts up to 280 characters, with up to four images or one video.
 - Threads: text posts up to 500 characters, with optional single image or video.
 - TikTok: video posts published through TikTok's Content Posting API - connect via TikTok OAuth on the Channels page, then re-authorise when the token expires.
 - Anything else: use manual export to copy platform-formatted text.
 - Credential setup: see the Channel credentials guide at </docs/credentials> for exact app, token and scope steps per platform.
 - Live status: the public status page lists all seven adapters with uptime and last-published timestamps.
- 1 Add the channel on the Channels page, or in step 1 of the setup wizard.
 - 2 Store the platform credentials for that workspace in Settings, then use Test connection to verify the token and pull the connected account details.

- 3 Map post types to destinations so each format routes to the right channel.
 - 4 Schedule from the planner, editor or bulk mode; PostingPilot's built-in publisher performs the actual publish.
 - 5 Delivery status updates flow back automatically, including confirmations reconciled from Meta webhooks.
- Connection health: the setup wizard and Channels page show, per channel, whether it is authenticated and ready to publish, what is missing (token, account ID, key rotation), and when the token was last verified. Recheck at any time.
 - Token expiry: expired or revoked tokens are flagged so you can reconnect without losing already-scheduled posts.
 - Preview before publish: the preview step shows the caption in your voice per channel and enforces platform requirements such as Instagram images and X character limits.
 - Retries: failed publishes queue and re-attempt automatically with backoff; you can also retry a single post and channel from a notification.
 - Delivery history: every delivery attempt and status change, timestamped, attributed per channel, with trend charts for attempts and success rate.
 - Scheduler health and runs: cron status, last successful run, circuit-breaker pauses, and a per-run timeline with logs and per-post results.

9. Analytics and intelligence

- Insights: reach and engagement trends, best-time-to-post heatmaps, hashtag performance, per-post delivery metrics.
- Post autopsy: an AI explanation of why a specific post over- or under-performed.
- Intelligence: topic clustering and gap analysis, with drill-down showing which scheduled posts would fill each gap.
- Learning loop: hook and hashtag performance feeds back into future suggestions.
- Health: publishing reliability - connection state, failure counts and queue depth.
- Traffic: first-party site analytics with referrer, country and device breakdowns.
- Usage: AI generations by feature and estimated spend.

10. Client portals and reports

- Portals: share a revocable link so a client can review and approve posts without an account.
- Approvals: approved and rejected items are reflected back in your planner.
- Reports: branded performance summaries you can send on a schedule.

- Credentials vault: store each client's own provider keys inside their workspace.

11. Settings and branding

- Branding: set product name, logo and colours for the workspace and client-facing output.
- Post-type routing: define which destination each post format uses by default.
- API keys: per-workspace credentials for AI and other providers.
- Onboarding checklist: tracks connection, voice, cadence and first scheduled post; steps auto-complete as you finish them.

12. Plans, trials and billing

- Tiers: Solo, Studio and Agency, monthly or annual.
- Trial: limited AI generations per day and per month; remaining generations and the next reset time appear on the dashboard and billing card.
- Plan changes: upgrades and downgrades are prorated automatically.
- Overages: a soft-cap buffer prevents hard stops mid-campaign, with limits shown in-app.
- Billing history: invoices, receipts, payment method management and promo codes.
- Emails: automatic notifications for new invoices and payment successes or failures.

13. Notifications

The notifications centre collects publishing outcomes in-app, in real time, so you are not dependent on email to find out that a batch failed.

- Live feed: batch outcomes, delayed posts, publish confirmations and platform API errors appear immediately, with an unread badge in the nav.
- Filters: narrow by channel, event type and date.
- Retry delivery: retry a failed post for one specific channel straight from the notification.
- Preferences: choose which event types you receive in-app versus by email, per channel.

14. Team members and roles

Invite people into a workspace with a role that decides what they can do. Access is enforced on the server, not just hidden in the UI.

- Owner: full access, including billing and the stored API keys.
- Editor: create, edit, schedule and publish content.
- Viewer: read-only access to content and analytics.

- Seats: the number of members allowed depends on your plan (Solo 1, Studio 3, Agency 10). Over-limit invites are rejected with the plan limit named.
- API keys stay owner-only regardless of role.

15. Research: patterns, trends and scoring

- Pattern library: import posts from creators in your niche and extract reusable hook and structure templates.
- Swipe board: imported posts grouped by theme, with favourite and discard actions.
- Trend radar: emerging topics in your niche, ready to send to the topic queue.
- Pre-publish scoring: a draft is scored on hook strength, clarity and call to action before you schedule it.
- Bulk mode: generate and preview several posts at once, then schedule them across selected channels in one step.

16. Engagement metrics

The engagement dashboard shows likes, shares, saves and comments for every published post, grouped by platform, so you can see what actually works rather than what merely went out.

- Per-post metrics: pulled automatically on a schedule for the platforms that expose an API, and shown per channel with totals and averages.
- Freshness panel: per-platform sync state (Fresh, Stale or Manual), the last successful pull time, and a plain-language hint when stats are delayed or unavailable.
- Historical snapshots: metrics are snapshotted daily so trend charts and week-over-week comparisons work, including inside client reports.
- Account metrics: follower counts and profile reach are recorded per channel alongside post-level numbers.
- Manual bucket: platforms without a metrics reader show as Manual - you can still record numbers by hand.

17. Campaigns, experiments and links

- Campaigns: group posts under a named campaign with a date range, and track content mix against your pillar targets.
- Content mix: see the share of published posts per pillar so one theme does not quietly take over the calendar.

- A/B experiments: run hook or caption variants against each other and read the winner on the experiments page once enough data lands.
- UTM links: generate tagged links per post and channel, with click counts and conversion attribution back to the originating post.
- Validation and duplicate detection: near-identical drafts are flagged before scheduling so you do not repeat yourself across channels.

18. Bulk operations and data portability

- CSV import: upload a post list with content, platform, schedule time and campaign; rows are validated and errors reported per line.
- CSV template: download a multi-platform template from the bulk page to build lists in Excel or Sheets.
- CSV export: export existing posts and their statuses for reporting or migration.
- Demo workspace: create a fully populated sample workspace to explore the product without touching live channels.
- Account deletion and data export: from Account settings, export your data or delete the account and its workspaces permanently.

19. Agency operations

- Email invites: invite a client or teammate by email; they receive a link and join the workspace with the role you chose, with no prior account needed.
- Approval reminders: clients sitting on a pending post are nudged automatically after a set number of days.
- Scheduled reports: branded performance reports delivered to clients on a recurring cadence.
- White-label (Agency plan): replace product name, logo, colours and sending domain across portals and reports.
- Client billing rollup: posts, AI drafts, videos, seats and estimated cost per client workspace, with a markup selector and invoice-ready CSV export.
- Audit log: every significant action recorded with actor, workspace and timestamp.
- Retention and attestation: set a retention window and legal hold, and generate SHA-256 hash-sealed audit exports with an attestation history.
- Competitor watch: track competitor accounts and compare their output and engagement against yours.
- Engagement inbox: comments and replies from connected channels in one queue.

20. Help, status and support

- Ask Pilot: the in-app assistant answers usage questions from this documentation and links to the relevant page.
- Contextual help: the help button opens the manual section that matches the page you are on.
- Status page: public uptime and last-published times for every publishing channel.
- Token health: a check that confirms stored credentials and portal tokens are valid.
- Trial nudges: when trial generations run low, an in-app banner shows what is left and links to upgrade or seat add-ons.

21. Troubleshooting

- "Not connected" or "Token expired" in connection health: the stored credential was rejected. Re-save the token in Settings, then press Recheck in the wizard or on the Channels page.
- "Missing account id": Facebook needs the Page ID and Instagram needs the Instagram Business account ID stored on the channel.
- Instagram post rejected: Instagram requires an image on every post - attach one in the preview step.
- X post rejected: the text exceeded 280 characters, or you attached more than four images or mixed images with a video.
- Threads post rejected: the text exceeded 500 characters, or you attached more than one media item.
- TikTok publish failed: TikTok tokens are short-lived - reconnect the channel with TikTok OAuth on the Channels page, then retry. TikTok also requires a video; text-only posts are rejected.
- YouTube upload failed: open the upload status on the post and press Retry - the error details and metadata are preserved.
- Engagement numbers missing or stale: check the freshness panel on the Engagement page. Platforms marked Manual have no metrics reader; Stale usually means the channel token needs reconnecting.
- Invite not received: check the invitee's spam folder, then resend from the Members page - invite links expire.
- Post stuck as scheduled: PostingPilot publishes at the scheduled time; the status updates once delivery completes. Check Delivery history, or Scheduler runs for the run that should have picked it up.

- Post failed: open Retries, or retry the specific channel from the notification. The failure reason is shown on the card.
- Video render failed: open the job, read the log, and press Retry - the prompt is preserved.
- Drafts do not sound right: add more everyday writing samples and re-check the trait sliders, then use Test drive before saving.
- Generation blocked: you may have hit a trial or plan limit. Check Usage for remaining generations and the reset time.

If a problem persists, note the workspace, the post and the timestamp from the Delivery history before contacting support - it makes diagnosis much faster.

Version history

v1.5 · 2026-08-25

- Added the in-app credentials wizard: guided per-network setup with required-field checks and a live connection test.
- Added a unified Test connection action covering LinkedIn, Facebook, Instagram, Threads, YouTube, X and TikTok.
- Added a printable channel credentials PDF with a per-network setup checklist.
- Added the troubleshooting guide mapping common connection and publishing errors to exact setup fixes.

v1.4 · 2026-08-25

- Added the Channel credentials guide: step-by-step app, token and scope setup for LinkedIn, Facebook, Instagram, Threads, YouTube, X and TikTok.
- Documented credential storage, encryption, rotation and connection troubleshooting.

v1.3 · 2026-08-19

- Added TikTok and Threads publishing, plus the public status page for all seven channels.
- Documented the engagement dashboard, metrics freshness, historical snapshots and account-level metrics.
- Added campaigns and content mix, A/B experiments, UTM links and conversion attribution.
- Added bulk CSV import/export, the demo workspace and email invites for clients.
- Documented agency operations: white-label, client billing rollup, audit retention and export attestation.
- Added seat add-ons, trial limit nudges, account deletion and data export, and the Ask Pilot help assistant.

v1.2 · 2026-08-17

- Documented the guided setup wizard and its channel connection health panel.
- Added Facebook, Instagram, YouTube and X (Twitter) direct publishing, including media and token requirements.
- Added sections for the notifications centre, team members and roles, and bulk scheduling.
- Documented the pattern library, trend radar and pre-publish scoring.

v1.1 · 2026-07-30

- Added in-page search, printable PDF editions and a feedback widget.

- Expanded the troubleshooting section with retry-queue and usage-limit guidance.

v1.0 · 2026-07-29

- First published edition of the User Manual and Quick Start Guide.