

Air4media Pilot v10 BETA | ACME Creative Agency OWNER | ACME Creative Agency | Laurent P Groult

Dashboard | Documentation

Clients Dashboard

Good morning | Import | Pipeline | Reports | Accounts | Projects | Wednesday, March 18, 2026

10 Total Accounts | 5 Active Clients | 2 Prospects | 2021 Active Projects | \$204.8M Pipeline Value | \$7.3M Total Revenue

Active Projects

View All →

Project Name	Start	End	Revenue
Market Research - Sunset Events Group Q2 2025	MAR 26	SEP 30	\$123.4K
Webinar Series - Pacific Coast Hospitality Annual	MAR 26	SEP 30	\$102.5K
Podcast Launch - Vista Wellness Retreats Summer	MAR 26	OCT 1	\$141.9K
UX/UI Sprint - Golden State Catering Co. Phase 2	MAR 26	OCT 2	\$162.7K
Podcast Launch - Luxe Brand Studios Q2 2025	MAR 26	OCT 2	\$60.5K

Revenue Trend

No revenue data yet

Pipeline

View Board →

\$204.8M (2021 projects)

proposed	363	\$4.1M
Contracted	399	\$40.7M
planning	377	\$38.3M
in_production	369	\$37.0M
On Hold	513	\$51.4M

Revenue per Year

\$40.8M total

2025	\$34.1M
2026	\$6.7M

Today

1 | Quotes (90d) | This Week

Harborview Proposal Review - William Foster | 33% Win Rate | \$8.1M won

220 Accepted | 102 Declined | 182 Pending | 0 activities this week

0 Calls | 0 Emails | 0 Meetings | 0 Tasks Done

Upcoming Events

Promo Video Shoot	Mar 19 06:00
Brand Workshop	Mar 24 09:00
Merch Design Deadline	Mar 31
Q2 Convention Planning	Mar 31 10:00

Recent Activity

- Prepare Topanga Winery discovery call (3d ago)
- Follow up on Harborview proposal (3d ago)
- Finalize Elevation stage mockups (4d ago)
- Brand workshop agenda sent to Elena (5d ago)
- Sent Harborview launch proposal (7d ago)
- Sent spring gala mood boards to Diana (9d ago)
- Luxe 2026 partnership discussion (12d ago)
- Sent Meridian rebrand proposal (12d ago)
- Meridian portfolio presentation (14d ago)
- Elevation deposit received (16d ago)
- Payment received - Riverside Q1 (17d ago)
- Initial call with William Foster (17d ago)
- Sent Q1 convention invoice (27/2026)
- Elevation 2026 contract signed (1/22/2026)
- Elevation 2026 pre-production meeting (1/20/2026)

Tasks & Follow-ups

- Prepare Topanga Winery discovery call
- Follow up on Harborview proposal
- Finalize Elevation stage mockups

Budget Status

Projects →

Annual Report - Bloom & Flourish Florals Phase 1	Under
Budget	\$0 / \$3.7K
Revenue	\$0 / \$10.6K
Annual Report - Elevation Music Festival Winter	Under
Budget	\$0 / \$1.7K
Revenue	\$0 / \$5.7K
Annual Report - Harborview Properties Sprint	Under
Budget	\$0 / \$1.3K
Revenue	\$0 / \$3.4K
Annual Report - Luxe Brand Studios Phase 2	Under
Budget	\$0 / \$467
Revenue	\$0 / \$1.2K
Annual Report - Meridian Tech Solutions Fall	Under
Budget	\$0 / \$2.4K
Revenue	\$0 / \$7.0K
Annual Report - Meridian Tech Solutions Phase 1	Under
Budget	\$0 / \$292
Revenue	\$0 / \$650
Annual Report - Riverside Convention Center Fall	Under
Budget	\$0 / \$1.4K
Revenue	\$0 / \$4.9K
Annual Report - Riverside Convention Center Q1 2025	Over
Budget	\$3.1K / \$683
Revenue	\$0 / \$2.0K
Annual Report - Riverside Convention Center Summer	Under
Budget	\$0 / \$387
Revenue	\$0 / \$1.1K
App Design - Elevation Music Festival Phase 1	Under
Budget	\$0 / \$317
Revenue	\$0 / \$600

Recently Active

- Riverside Convention Center CLIENT \$1.7M (3d ago)
- Elevation Music Festival CLIENT \$2.1M (4d ago)
- Pacific Coast Hospitality CLIENT \$890.0K (5d ago)
- Luxe Brand Studios PARTNER \$520.0K (6d ago)
- Sunset Events Group CLIENT \$1.3M (7d ago)

Clients Dashboard

Your central command center for managing clients, projects, revenue, and team activity. For an account like ACME Creative Agency, the dashboard brings together every active project, pending invoice, upcoming event, and open task in one view — no hunting across separate screens.

Getting Started

New accounts see a **welcome screen** with a 5-step checklist (add an account, create a project, set up your pipeline, send a quote, track revenue) and feature cards linking directly to each section so you can jump right in.

Key Features

- **KPI Stats Bar:** Live counts for total accounts, active clients, prospects, active projects, pipeline value, and total revenue — all clickable to open filtered views.
- **Active Projects Timeline:** In-progress projects with status, priority, client name, and dates. Click any row to open the full project detail panel.
- **Revenue Trend Chart:** Collected revenue over the past 6 months with a badge showing this month vs. last month.
- **Annual Revenue Chart:** Total realized revenue by year, so you can see growth at a glance.
- **Pipeline Funnel:** Open projects by stage — Proposed, Contracted, Planning, In Production, On Hold — with deal counts and values per stage.
- **Today's Appointments:** All meetings and calls for today with time and linked client.
- **Quote Win Rate (90 days):** Quotes sent, accepted, declined, and total accepted value over the last 90 days.
- **This Week's Activity:** Calls made, emails sent, meetings held, and tasks completed since Monday.
- **Upcoming Events:** Project milestones and events due in the next 14 days, sorted by date.
- **Recent Activity Feed:** Live log of the latest 15 actions across all accounts — notes, calls, emails, and status changes.
- **Overdue Invoices:** Alert panel (shown only when needed) listing past-due invoices with client name, amount, and due date.
- **Tasks & Follow-ups:** All pending tasks, reminders, scheduled calls, and meetings that still need attention.
- **Budget Status:** Projects with budgets show spending and revenue targets vs. actuals for

the current month, with clear On Track / Over / Behind indicators.

- **Expiring Contracts:** Active contracts expiring within 30 days so you can renew or follow up in time.
- **Recently Active Accounts:** The 5 accounts with the most recent activity, for quick access.

Project Detail View

Click any project row to open its full detail panel. Tabs let you manage every aspect of the project in one place:

- **Events** — Add and manage project events (ceremonies, deliveries, setup days, etc.)
- **Quotes** — Create, send, and convert quotes into contracts or invoices
- **Documents** — Manage contracts, including electronic signature from both parties
- **Invoices** — Track payments, record receipts, and manage billing
- **Timeline** — Full chronological history of everything that happened on the project

The sidebar shows status, type, priority, dates, budget, and expense tracking — all editable in place. Use the fullscreen toggle for a larger workspace.

How to Use

1. Open **Clients Dashboard** from the main menu.
2. Review your KPI stats at the top — they refresh every time the page loads.
3. Scroll down to check active projects. Click any project row to open full details.
4. Address the **Overdue Invoices** panel immediately if it appears.
5. Review **Tasks & Follow-ups** to see what actions are due today.
6. Use the top-right buttons to jump to **Accounts, Projects, Pipeline, or Reports**.

Importing Contacts

Click **Import** at the top right to bring contacts in from a CSV file.

1. Upload your CSV (supports name, email, phone, company, job title, city, country, and tags).
2. Map each column to the correct contact field. Enable **Update existing contacts** to avoid duplicates (matched by email) and optionally add bulk tags to all imported records.
3. Click **Import** — a progress tracker shows results as contacts are added.

Tips

- **Overdue Invoices** and **Expiring Contracts** panels only appear when there is something to show — a clean dashboard means you're up to date.
- Click **Pipeline** in the top bar to see your project pipeline as a drag-and-drop Kanban board.
- Click **Reports** for detailed revenue and performance breakdowns over custom date ranges.
- Click **Calendar** in the Upcoming Events panel to see all scheduled project events in a full calendar view.
- Accepted quotes can be converted directly into a contract or invoice from the project detail panel.