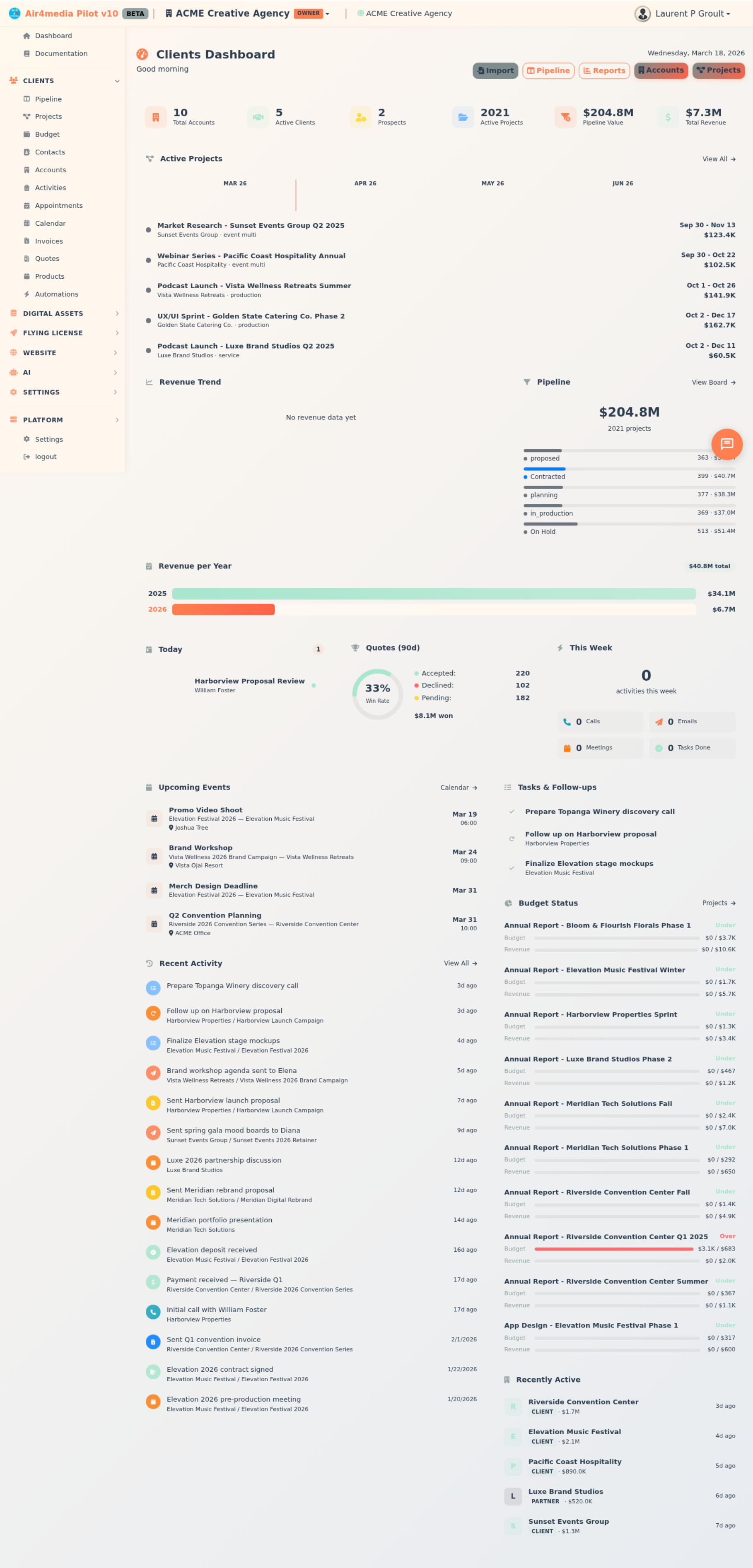
Air4media Pilot v10
BETA
ACME Creative Agency
OWNER
ACME Creative Agency
Laurent P Groult
Dashboard
Documentation
CLIENTS
Pipeline
Projects
Budget
Contacts
Accounts
Activities
Appointments
Calendar
Invoices
Quotes
Products
Automations
DIGITAL ASSETS
FLYING LICENSE
WEBSITE
AI
SETTINGS
PLATFORM
Settings
logout
Clients Dashboard
Good morning
Wednesday, March 18, 2026
Import
Pipeline
Reports
Accounts
Projects
10
Total Accounts
5
Active Clients
2
Prospects
2021
Active Projects
$204.8M
Pipeline Value
$7.3M
Total Revenue
Active Projects
View All →
MAR 26
APR 26
MAY 26
JUN 26
Market Research - Sunset Events Group Q2 2025
Sunset Events Group · event multi
Sep 30 - Nov 13
$123.4K
Webinar Series - Pacific Coast Hospitality Annual
Pacific Coast Hospitality · event multi
Sep 30 - Oct 22
$102.5K
Podcast Launch - Vista Wellness Retreats Summer
Vista Wellness Retreats · production
Oct 1 - Oct 26
$141.9K
UX/UI Sprint - Golden State Catering Co. Phase 2
Golden State Catering Co. · production
Oct 2 - Dec 17
$162.7K
Podcast Launch - Luxe Brand Studios Q2 2025
Luxe Brand Studios · service
Oct 2 - Dec 11
$60.5K
Revenue Trend
No revenue data yet
Pipeline
View Board →
$204.8M
2021 projects
proposed
363 ·
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
Harborview Proposal Review
William Foster
Quotes (90d)
33%
Win Rate
Accepted: 220
Declined: 102
Pending: 182
$8.1M won
This Week
0
activities this week
0 Calls
0 Emails
0 Meetings
0 Tasks Done
Upcoming Events
Calendar →
Promo Video Shoot
Elevation Festival 2026 — Elevation Music Festival
Joshua Tree
Mar 19
06:00
Brand Workshop
Vista Wellness 2026 Brand Campaign — Vista Wellness Retreats
Vista Ojai Resort
Mar 24
09:00
Merch Design Deadline
Elevation Festival 2026 — Elevation Music Festival
Mar 31
Q2 Convention Planning
Riverside 2026 Convention Series — Riverside Convention Center
ACME Office
Mar 31
10:00
Tasks & Follow-ups
Prepare Topanga Winery discovery call
Follow up on Harborview proposal
Harborview Properties
Finalize Elevation stage mockups
Elevation Music Festival
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 / $367
Revenue $0 / $1.1K
App Design - Elevation Music Festival Phase 1
Under
Budget $0 / $317
Revenue $0 / $600
Recent Activity
View All →
Prepare Topanga Winery discovery call
3d ago
Follow up on Harborview proposal
Harborview Properties / Harborview Launch Campaign
3d ago
Finalize Elevation stage mockups
Elevation Music Festival / Elevation Festival 2026
4d ago
Brand workshop agenda sent to Elena
Vista Wellness Retreats / Vista Wellness 2026 Brand Campaign
5d ago
Sent Harborview launch proposal
Harborview Properties / Harborview Launch Campaign
7d ago
Sent spring gala mood boards to Diana
Sunset Events Group / Sunset Events 2026 Retainer
9d ago
Luxe 2026 partnership discussion
Luxe Brand Studios
12d ago
Sent Meridian rebrand proposal
Meridian Tech Solutions / Meridian Digital Rebrand
12d ago
Meridian portfolio presentation
Meridian Tech Solutions
14d ago
Elevation deposit received
Elevation Music Festival / Elevation Festival 2026
16d ago
Payment received — Riverside Q1
Riverside Convention Center / Riverside 2026 Convention Series
17d ago
Initial call with William Foster
Harborview Properties
17d ago
Sent Q1 convention invoice
Riverside Convention Center / Riverside 2026 Convention Series
2/1/2026
Elevation 2026 contract signed
Elevation Music Festival / Elevation Festival 2026
1/22/2026
Elevation 2026 pre-production meeting
Elevation Music Festival / Elevation Festival 2026
1/20/2026
Recently Active
R
Riverside Convention Center
CLIENT · $1.7M
3d ago
E
Elevation Music Festival
CLIENT · $2.1M
4d ago
P
Pacific Coast Hospitality
CLIENT · $890.0K
5d ago
L
Luxe Brand Studios
PARTNER · $520.0K
6d ago
S
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.