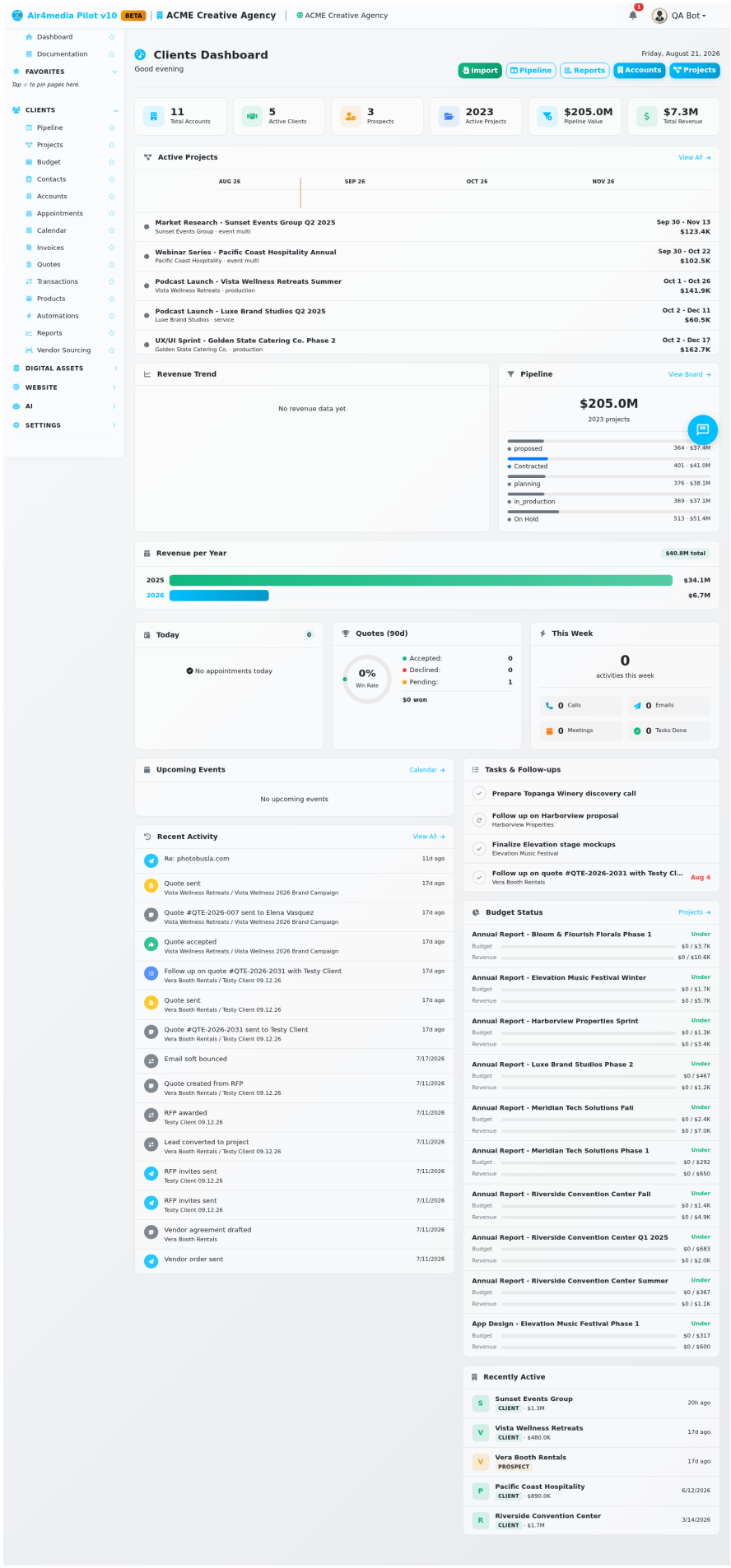
Air4media Pilot v10
BETA
ACME Creative Agency
ACME Creative Agency
QA Bot
Dashboard
Documentation
FAVORITES
Tap ☆ to pin pages here.
CLIENTS
Pipeline
Projects
Budget
Contacts
Accounts
Appointments
Calendar
Invoices
Quotes
Transactions
Products
Automations
Reports
Vendor Sourcing
DIGITAL ASSETS
WEBSITE
AI
SETTINGS
Clients Dashboard
Good evening
Friday, August 21, 2026
Import
Pipeline
Reports
Accounts
Projects
11
Total Accounts
5
Active Clients
3
Prospects
2023
Active Projects
$205.0M
Pipeline Value
$7.3M
Total Revenue
Active Projects
View All →
AUG 26
SEP 26
OCT 26
NOV 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
Podcast Launch - Luxe Brand Studios Q2 2025
Luxe Brand Studios · service
Oct 2 - Dec 11
$60.5K
UX/UI Sprint - Golden State Catering Co. Phase 2
Golden State Catering Co. · production
Oct 2 - Dec 17
$162.7K
Revenue Trend
No revenue data yet
Pipeline
View Board →
$205.0M
2023 projects
proposed
364 · $37.4M
Contracted
401 · $41.0M
planning
376 · $38.1M
in_production
369 · $37.1M
On Hold
513 · $51.4M
Revenue per Year
$40.8M total
2025
$34.1M
2026
$6.7M
Today
0
No appointments today
Quotes (90d)
0%
Win Rate
Accepted:
0
Declined:
0
Pending:
1
$0 won
This Week
0
activities this week
0 Calls
0 Emails
0 Meetings
0 Tasks Done
Upcoming Events
Calendar →
No upcoming events
Tasks & Follow-ups
Prepare Topanga Winery discovery call
Follow up on Harborview proposal
Harborview Properties
Finalize Elevation stage mockups
Elevation Music Festival
Follow up on quote #QTE-2026-2031 with Testy Cl...
Aug 4
Vera Booth Rentals
Recent Activity
View All →
Re: photobusla.com
11d ago
Quote sent
Vista Wellness Retreats / Vista Wellness 2026 Brand Campaign
17d ago
Quote #QTE-2026-007 sent to Elena Vasquez
Vista Wellness Retreats / Vista Wellness 2026 Brand Campaign
17d ago
Quote accepted
Vista Wellness Retreats / Vista Wellness 2026 Brand Campaign
17d ago
Follow up on quote #QTE-2026-2031 with Testy Client
Vera Booth Rentals / Testy Client 09.12.26
17d ago
Quote sent
Vera Booth Rentals / Testy Client 09.12.26
17d ago
Quote #QTE-2026-2031 sent to Testy Client
Vera Booth Rentals / Testy Client 09.12.26
17d ago
Email soft bounced
7/17/2026
Quote created from RFP
Vera Booth Rentals / Testy Client 09.12.26
7/11/2026
RFP awarded
Testy Client 09.12.26
7/11/2026
Lead converted to project
Vera Booth Rentals / Testy Client 09.12.26
7/11/2026
RFP invites sent
Testy Client 09.12.26
7/11/2026
RFP invites sent
Testy Client 09.12.26
7/11/2026
Vendor agreement drafted
Vera Booth Rentals
7/11/2026
Vendor order sent
7/11/2026
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
Under
Budget $0 / $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
Recently Active
Sunset Events Group
CLIENT · $1.3M
20h ago
Vista Wellness Retreats
CLIENT · $480.0K
17d ago
Vera Booth Rentals
PROSPECT
17d ago
Pacific Coast Hospitality
CLIENT · $890.0K
6/12/2026
Riverside Convention Center
CLIENT · $1.7M
3/14/2026

Clients

Your CRM home base — an at-a-glance view of every account, project, deal, and task across your business.

Key Features

- **KPI Summary Bar**: Six live counters at the top — Total Accounts, Active Clients, Prospects, Active Projects, Pipeline Value, and Total Revenue — so you always know where you stand.
- **Active Projects Timeline**: A visual Gantt-style chart showing all in-progress projects across their date ranges. Click any project bar to jump straight to the project detail.
- **Revenue Trend**: A 6-month bar chart of collected payments with a badge showing how this month compares to last month (e.g. +12% vs last month).
- **Pipeline Funnel**: A breakdown of your active deals by stage — Lead, Proposal, Contracted, In Progress, On Hold — with project counts and estimated values per stage.
- **Today's Appointments**: All appointments scheduled for today, listed by time.
- **Quote Win Rate**: A 90-day scorecard showing how many quotes were accepted, declined, or are still pending, plus your overall win percentage.
- **This Week's Activity**: A running count of calls made, emails sent, meetings held, and tasks completed since Monday.
- **Upcoming Events**: Project-linked events happening in the next 14 days, with dates and venue info.
- **Recent Activity Feed**: A live stream of the last 15 actions across all accounts — calls, emails, notes, payments, status changes, and more.
- **Overdue Invoices**: An alert card (shown only when needed) listing past-due invoices with days overdue and total amount outstanding.
- **Tasks & Follow-ups**: Your pending calls, follow-ups, meetings, and tasks. Click the icon on any task to mark it complete without leaving the dashboard.
- **Budget Status**: For projects with monthly budgets or revenue targets, a progress bar shows whether you're under, on track, or over for the current month.
- **Expiring Contracts**: Contracts reaching their end date within 30 days appear here as a heads-up (hidden when none are expiring soon).
- **Recently Active Accounts**: The five accounts with the most recent activity, with type badge (client, prospect, lead) and total revenue.
- **Import Contacts**: Upload a CSV file to bulk-import contacts. Preview and map your columns before importing, with an option to update existing records matched by email address.

How to Use

1. Open **Clients** from the sidebar to see your full dashboard.
2. Check the **KPI bar** at the top for a quick health check of your accounts and pipeline.
3. Review the **Timeline** to see which projects are active and where they fall in the calendar.
4. Use the **Pipeline Funnel** to spot where deals are concentrated and click **View Board** to manage them.
5. Check **Tasks & Follow-ups** and click the task icon to complete items directly from the dashboard.
6. If the **Overdue Invoices** card appears, address those accounts promptly.
7. To add contacts in bulk, click **Import** in the top-right, upload your CSV, map the columns, and confirm.

Tips

- The dashboard updates automatically when you switch sites using the site selector in the top bar.
- Tasks completed here are reflected immediately across the CRM — no need to visit the activities page.
- Use the **Pipeline** and **Reports** buttons in the top-right to dive deeper into deal management and analytics.
- The Revenue Trend badge turns red when this month's revenue is below last month — a quick signal to focus on collections.
- Contracts expiring within 7 days show in red; 8–30 days show in amber.