

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

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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 →

● Market Research - Sunset Events Group Q2 2025 <small>Sunset Events Group - event multi</small>	MAR 26	Sep 30 - Nov 13 \$123.4K
● Webinar Series - Pacific Coast Hospitality Annual <small>Pacific Coast Hospitality - event multi</small>	APR 26	Sep 30 - Oct 22 \$102.5K
● Podcast Launch - Vista Wellness Retreats Summer <small>Vista Wellness Retreats - production</small>	MAY 26	Oct 1 - Oct 26 \$141.9K
● UX/UI Sprint - Golden State Catering Co. Phase 2 <small>Golden State Catering Co. - production</small>	JUN 26	Oct 2 - Dec 17 \$162.7K
● Podcast Launch - Luxe Brand Studios Q2 2025 <small>Luxe Brand Studios - service</small>		Oct 2 - Dec 11 \$60.5K

Revenue Trend

No revenue data yet

Pipeline View Board →

\$204.8M

2021 projects

●	proposed	363 \$1.1M
●	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

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

●	<p>Promo Video Shoot <small>Elevation Festival 2026 — Elevation Music Festival</small></p> <p style="font-size: 0.8em;">Joshua Tree</p>	<p>Mar 19</p> <p style="font-size: 0.8em;">06:00</p>
●	<p>Brand Workshop <small>Vista Wellness 2026 Brand Campaign — Vista Wellness Retreats</small></p> <p style="font-size: 0.8em;">Vista Ojai Resort</p>	<p>Mar 24</p> <p style="font-size: 0.8em;">09:00</p>
●	<p>Merch Design Deadline <small>Elevation Festival 2026 — Elevation Music Festival</small></p>	<p>Mar 31</p>
●	<p>Q2 Convention Planning <small>Riverside 2026 Convention Series — Riverside Convention Center</small></p> <p style="font-size: 0.8em;">ACME Office</p>	<p>Mar 31</p> <p style="font-size: 0.8em;">10:00</p>

Tasks & Follow-ups

- ✓ Prepare Topanga Winery discovery call
- Follow up on Harborview proposal
Harborview Properties / Harborview Launch Campaign
- ✓ Finalize Elevation stage mockups
Elevation Music Festival / Elevation Festival 2026
- Brand workshop agenda sent to Elena
Vista Wellness Retreats / Vista Wellness 2026 Brand Campaign
- Sent Harborview launch proposal
Harborview Properties / Harborview Launch Campaign
- Sent spring gala mood boards to Diana
Sunset Events Group / Sunset Events 2026 Retainer
- Luxe 2026 partnership discussion
Luxe Brand Studios
- Sent Meridian rebrand proposal
Meridian Tech Solutions / Meridian Digital Rebrand
- Meridian portfolio presentation
Meridian Tech Solutions
- Elevation deposit received
Elevation Music Festival / Elevation Festival 2026
- Payment received — Riverside Q1
Riverside Convention Center / Riverside 2026 Convention Series
- Initial call with William Foster
Harborview Properties
- Sent Q1 convention invoice
Riverside Convention Center / Riverside 2026 Convention Series
- Elevation 2026 contract signed
Elevation Music Festival / Elevation Festival 2026
- Elevation 2026 pre-production meeting
Elevation Music Festival / Elevation Festival 2026

Recent Activity

- 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 27/2026
- 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

Budget Status Projects →

●	<p>Annual Report - Bloom & Flourish Florals Phase 1</p> <p style="font-size: 0.8em;">Budget: \$0 / \$3.7K Revenue: \$0 / \$10.6K</p>	Under
●	<p>Annual Report - Elevation Music Festival Winter</p> <p style="font-size: 0.8em;">Budget: \$0 / \$1.7K Revenue: \$0 / \$5.7K</p>	Under
●	<p>Annual Report - Harborview Properties Sprint</p> <p style="font-size: 0.8em;">Budget: \$0 / \$1.3K Revenue: \$0 / \$3.4K</p>	Under
●	<p>Annual Report - Luxe Brand Studios Phase 2</p> <p style="font-size: 0.8em;">Budget: \$0 / \$467 Revenue: \$0 / \$1.2K</p>	Under
●	<p>Annual Report - Meridian Tech Solutions Fall</p> <p style="font-size: 0.8em;">Budget: \$0 / \$2.4K Revenue: \$0 / \$7.0K</p>	Under
●	<p>Annual Report - Meridian Tech Solutions Phase 1</p> <p style="font-size: 0.8em;">Budget: \$0 / \$292 Revenue: \$0 / \$650</p>	Under
●	<p>Annual Report - Riverside Convention Center Fall</p> <p style="font-size: 0.8em;">Budget: \$0 / \$1.4K Revenue: \$0 / \$4.9K</p>	Under
●	<p>Annual Report - Riverside Convention Center Q1 2025</p> <p style="font-size: 0.8em;">Budget: \$3.1K / \$683 Revenue: \$0 / \$2.0K</p>	Over
●	<p>Annual Report - Riverside Convention Center Summer</p> <p style="font-size: 0.8em;">Budget: \$0 / \$387 Revenue: \$0 / \$1.1K</p>	Under
●	<p>App Design - Elevation Music Festival Phase 1</p> <p style="font-size: 0.8em;">Budget: \$0 / \$317 Revenue: \$0 / \$600</p>	Under

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.