Air4media Pilot v10 BETA | 🏢 Select Company OWNER ⌄ | 🌐 All Sites ⌄

👤 Laurent P Groult ⌄

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Clients Dashboard

Good evening

Tuesday, February 24, 2026

📥 Import | 📊 Pipeline | 📈 Reports | 🏢 Accounts

🏢 **1** Total Accounts
🎥 **1** Active Clients
👥 **0** Prospects
📁 **1** Active Projects
🏷️ **$15.0K** Pipeline Value
$ **$0** Total Revenue

🔀 **Active Projects** — View All →

FEB 26 — MAR 26

Test

● **Test** — Test Client Corp · event multi — Mar 10 - Mar 14 $15.0K

📈 **Revenue Trend** — ↓ -100% vs last month

$20.0K

Jan

🔽 **Pipeline** — View Board →

$15.0K — 1 projects

● Leads — 1 - $15.0K

📅 **Today** — 0

○ No appointments today

🏆 **Quotes (90d)**

No quotes in last 90 days

⚡ **This Week**

3 activities this week

📞 **0** Calls | ✈ **0** Emails
🗓 **0** Meetings | ✓ **0** Tasks Done

📅 **Upcoming Events** — Calendar →

No upcoming events

☰ **Tasks & Follow-ups**

✓ All caught up!

🕘 **Recent Activity** — View All →

● Expense added: Venue deposit for Terranea Resort — 1h ago
Test Client Corp / Test

● Budget updated — 1h ago
Test Client Corp / Test

● Project created — 1d ago
Test Client Corp / Test

💰 **Budget Status** — Projects →

Test — Under
Budget — $2.5K / $5.0K
Revenue — $0 / $10.0K

🏢 **Recently Active**

T **Test Client Corp** — 1d ago
CLIENT

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.