

Agency OS

Admin Dashboard Manual

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Reference

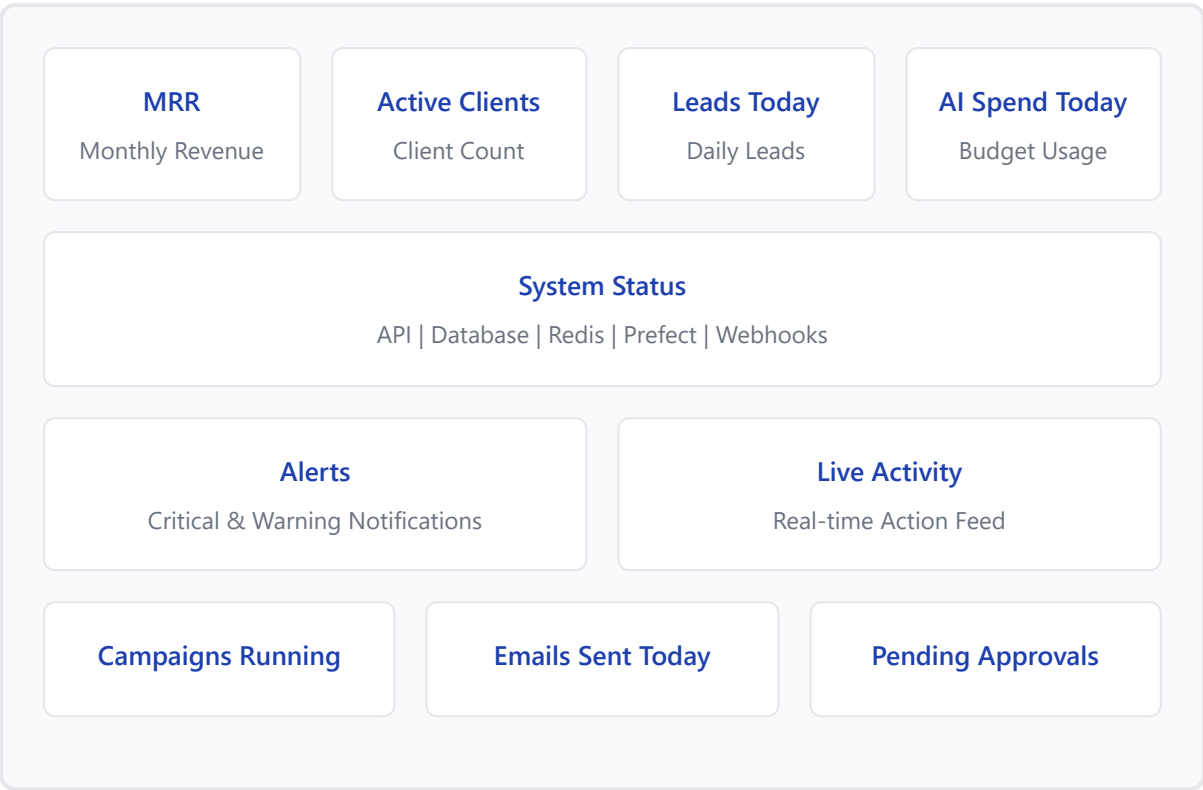
Glossary of Terms

1. Command Center

/admin

The Command Center is your primary dashboard for monitoring the entire Agency OS platform at a glance. It provides real-time visibility into business metrics, system health, and alerts.

Page Layout



Widget Details

KPI Cards (Top Row)

Widget	Metric	Description	Action Threshold
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MRR	\$47,500 (+12% MoM)	Monthly Recurring Revenue from all active subscriptions	Monitor if <5% growth
Active Clients	19 (+2 new)	Count of clients with active subscriptions	Target: Steady growth
Leads Today	1,247	Total leads processed across all clients today	Monitor for unusual drops
AI Spend Today	\$89 / \$500	Anthropic API costs vs daily limit	Circuit breaker at 100%

System Status Indicator

Displays health of all core services with latency metrics:

Service	What It Does	Healthy Latency	When to Worry
API	FastAPI backend server	<100ms	>500ms or red status
Database	Supabase PostgreSQL	<50ms	>200ms indicates connection issues
Redis	Upstash cache layer	<10ms	>50ms degrades enrichment
Prefect	Workflow orchestration	<500ms	Check if flows are stuck
Webhooks	Incoming event receivers	<100ms	Replies may be missed if unhealthy

Alerts Banner

Critical Alerts

Require immediate action. Examples: Failed enrichments, payment failures, system errors.

Warning Alerts

Monitor closely. Examples: Rate limits at 80%, client inactivity, approaching budget limits.

Live Activity Feed

Real-time stream of actions across all clients. Shows:

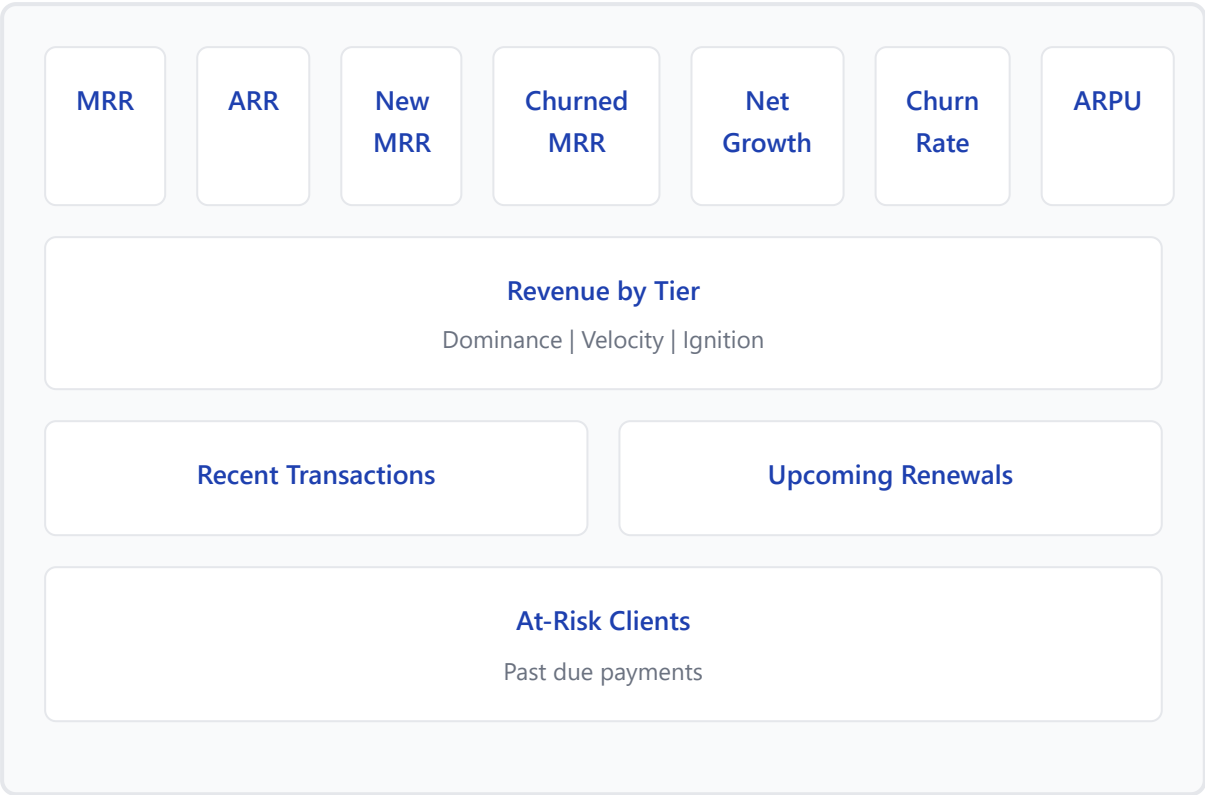
- **Email sent** - Outbound email dispatched
- **Lead enriched** - Contact data enhanced with ALS score
- **Reply received** - Inbound response detected
- **LinkedIn sent** - Connection request or message sent
- **SMS sent** - Text message dispatched
- **Voice call** - AI call completed
- **Mail sent** - Physical mail queued

2. Revenue Dashboard

/admin/revenue

Comprehensive financial overview showing all revenue metrics, tier breakdowns, and billing status.

Page Layout



Revenue Metrics Explained

Metric	Formula / Description	Example	Target
MRR	Sum of all monthly subscription fees	\$47,500	Steady month-over-month growth

ARR	MRR x 12	\$570,000	Annualized revenue projection
New MRR	Revenue from new clients this month	+\$2,497	Should exceed Churned MRR
Churned MRR	Lost revenue from cancellations	-\$499	Keep below 3% of MRR
Net Growth	New MRR - Churned MRR	+\$1,998	Must be positive
Churn Rate	(Churned MRR / MRR) x 100	1.05%	<div><2%</div> <div>2-5%</div> <div>>5%</div>
ARPU	MRR / Active Clients	\$2,500	Monitor for upsell opportunities

Pricing Tiers

Tier	Monthly Price	Target Market
Ignition	\$199/month	Startups, small agencies
Velocity	\$499/month	Growing businesses
Dominance	\$999/month	Enterprise, high-volume clients

At-Risk Clients Section

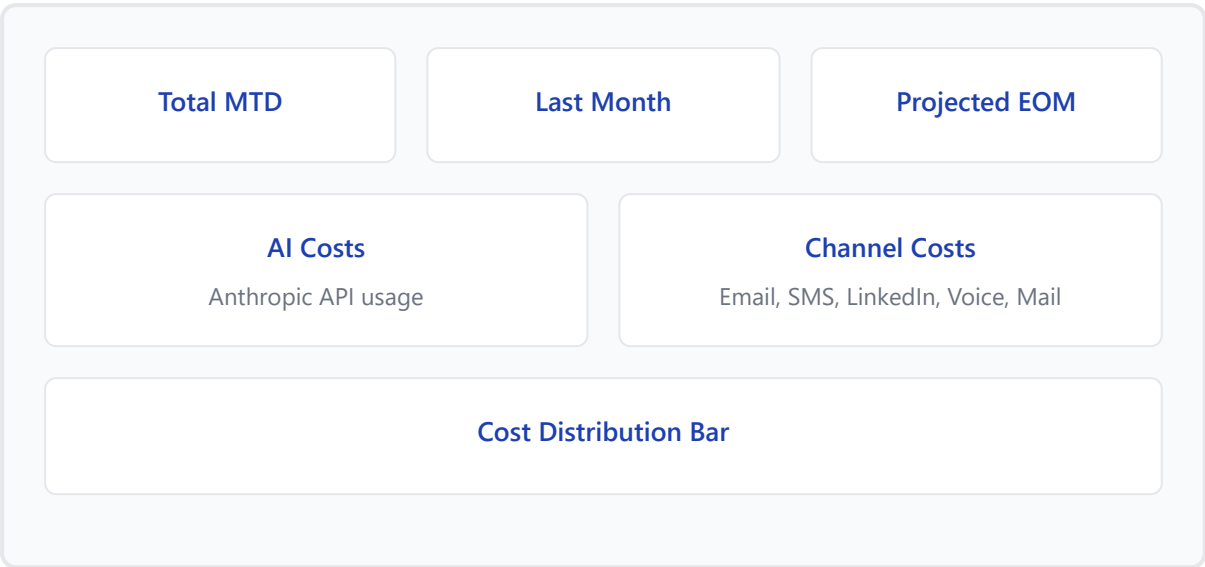
Shows clients with past-due payments. Take immediate action: contact client, check Stripe, consider service suspension if >7 days overdue.

3. Costs Overview

/admin/costs

Platform-wide cost tracking combining AI and channel costs for margin analysis.

Page Layout



Cost Breakdown

Category	Components	Target %
AI Costs	Content Agent, Reply Agent, CMO Agent	~40-45% of total costs
Channel Costs	Email (Resend), SMS (Twilio), LinkedIn (HeyReach), Voice (Synthflow), Mail (Lob)	~55-60% of total costs

Gross Margin Target

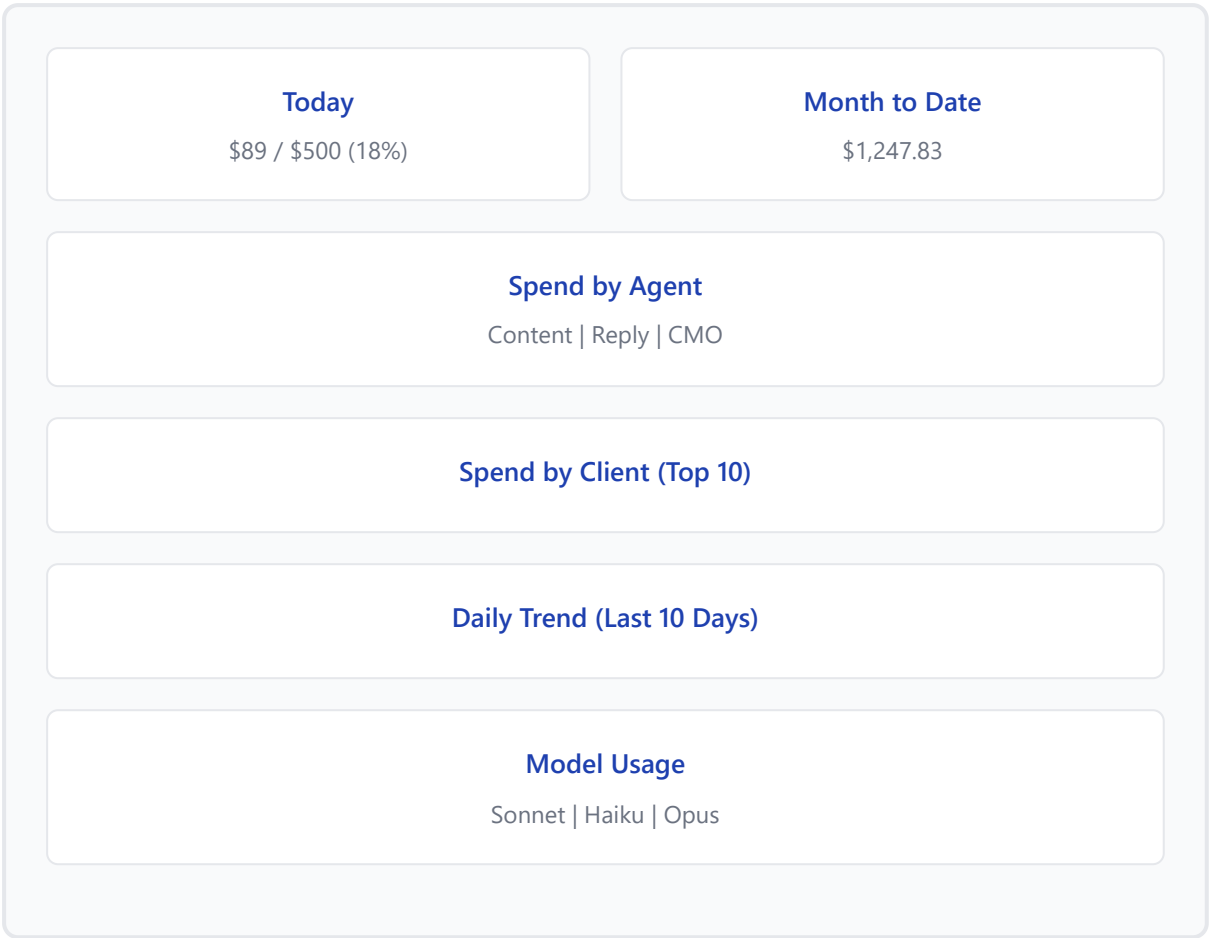
Target: 75%+ gross margin. Calculate as: $(\text{MRR} - \text{Total Costs}) / \text{MRR} \times 100$. If margin drops below 70%, investigate high-cost clients or inefficient operations.

4. AI Costs

/admin/costs/ai

Detailed Anthropic API spend tracking with daily limits and circuit breaker monitoring.

Page Layout



AI Agents Explained

Agent	Purpose	Typical % of AI Spend
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Content Agent	Generates personalized outreach emails, LinkedIn messages, SMS	~42%
Reply Agent	Analyzes incoming replies, classifies intent, drafts responses	~33%
CMO Agent	Campaign strategy, ICP analysis, messaging optimization	~25%

Model Usage

Model	Use Case	Cost Factor
Claude Sonnet	Primary model for most tasks	Medium
Claude Haiku	Fast, simple tasks (classification)	Low
Claude Opus	Complex reasoning tasks	High

Circuit Breaker

When daily AI spend reaches 100% of limit (\$500), the system automatically stops all AI-powered operations to prevent runaway costs. If this occurs, review high-consumption clients and consider raising the limit if justified.

5. Channel Costs

/admin/costs/channels

Per-channel spend breakdown for all outreach platforms.

Channel Cost Details

Channel	Provider	Cost Per Unit	Typical Monthly Volume
Email	Resend	\$0.025 per email	18,470 emails
SMS	Twilio	\$0.166 per message	2,340 messages
LinkedIn	HeyReach	\$0.117 per action	4,560 actions
Voice	Synthflow	\$1.00 per call	156 calls
Direct Mail	Lob	\$1.42 per piece	45 pieces

Actions to Take

- **High email costs:** Review list quality, implement better targeting
- **High SMS costs:** Ensure SMS is used only for high-value leads
- **High LinkedIn costs:** Optimize connection acceptance rate
- **High voice costs:** Reserve for hottest leads only

6. Clients List

/admin/clients

Master directory of all clients with filtering, health scores, and quick actions.

Client Table Columns

Column	Description	Action Guidance
Client Name	Company name (clickable to detail view)	Click to view full details
Tier	Ignition / Velocity / Dominance	Consider upsell if high activity
MRR	Monthly subscription amount	Track for revenue reporting
Status	Active / Trialing / Past Due / Paused / Cancelled	Act on past_due immediately
Campaigns	Number of active campaigns	Low count may indicate disengagement
Leads	Total leads in system	High volume = good engagement
Last Activity	Time since last platform action	<div>>24h</div> <div>>48h warrants outreach</div>
Health	Health score (0-100)	See Health Score section

Health Score Explained

Score Range	Status	Meaning	Action
70-100	Healthy	Active, engaged, no issues	Maintain relationship, consider upsell
40-69	At Risk	Declining activity or issues	Proactive outreach, check-in call
0-39	Critical	High churn risk	Immediate intervention required

7. Client Detail View

/admin/clients/[id]

Deep dive into a single client with all metrics, team members, campaigns, and billing history.

Page Tabs

Overview Tab

- **MRR Card:** Current subscription and renewal date
- **Credits Card:** Remaining vs total credits
- **Active Campaigns:** Count of running campaigns
- **Last Activity:** Most recent platform action
- **Team Members:** List of users with roles (owner/admin/member)

Campaigns Tab

All campaigns for this client with:

- Campaign name and status (active/paused/completed/draft)
- Leads count and sent count
- Replies and reply rate percentage

Activity Tab

Chronological log of all actions for this client including emails sent, leads enriched, replies received, etc.

Billing Tab

Payment history with invoice numbers, amounts, and status.

Admin Actions

Action	When to Use
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Impersonate	Login as client to troubleshoot issues
Pause	Temporarily suspend campaigns (billing continues)
Cancel	End subscription (requires confirmation)

8. Campaigns

/admin/campaigns

Global view of all campaigns across all clients.

Campaign Statuses

Status	Description
Active	Currently sending outreach
Paused	Temporarily stopped (manual or automatic)
Completed	All leads processed
Draft	Not yet launched

Key Metrics

Metric	Good Benchmark
Reply Rate	>5% is good, >8% is excellent
Leads to Sent Ratio	Should be high (80%+) indicating good data quality

9. Leads

/admin/leads

Global leads database with ALS (Agency Lead Score) distribution.

ALS Tier System

Score	Tier	Description	Priority
90-100	Hot	Ideal fit, high intent signals	Highest - multi-channel engagement
70-89	Warm	Strong match, some intent	High - email + LinkedIn
50-69	Cool	Moderate match	Medium - email sequence
30-49	Cold	Weak match	Low - nurture only
0-29	Dead	Poor fit or invalid	None - do not contact

Lead Statuses

- **New:** Just uploaded, not yet processed
- **Enriched:** Data enhanced, scored
- **Scored:** ALS calculated
- **In Sequence:** Active in campaign
- **Converted:** Became opportunity/customer
- **Unsubscribed:** Opted out
- **Bounced:** Invalid email

10. Activity Feed

/admin/activity

Real-time log of all platform activity across all clients.

Activity Types

Channel	Actions Logged
Email	Sent, Opened, Clicked, Bounced, Reply Received
SMS	Sent, Delivered, Reply Received
LinkedIn	Connection Sent, Message Sent, Reply Received
Voice	Call Initiated, Call Completed, Voicemail Left
Mail	Queued, Sent, Delivered
System	Lead Enriched, Lead Scored, Error Occurred

Live Indicator

The pulsing green dot indicates the feed is updating in real-time. Activity appears within seconds of occurring.

11. Replies Management

/admin/replies

Global inbox for all replies across all clients with intent classification.

Intent Classifications

Intent	Description	Action
Interested	Positive response, wants to learn more	Alert client immediately, prioritize follow-up
Meeting Request	Wants to schedule a call	Book meeting ASAP
Question	Asking for information	Respond with helpful answer
Not Interested	Decline, negative response	Mark as closed, analyze for patterns
Unsubscribe	Request to stop contact	Add to suppression list immediately
Out of Office	Auto-reply, person unavailable	Schedule follow-up after return date
Auto Reply	Automated response, no human	Ignore or retry later

12. Compliance Overview

/admin/compliance

Email deliverability and regulatory compliance monitoring.

Key Metrics

Metric	Target	Warning	Critical
Bounce Rate	<2%	2-5%	>5%
Spam Complaint Rate	<0.1%	0.1-0.3%	>0.3%

Suppression Categories

- **Spam Complaints:** Recipients marked as spam
- **Unsubscribes:** Requested removal
- **Bounces:** Invalid addresses
- **Manual Blocks:** Admin-added (competitors, etc.)

DNCR Compliance

The Do Not Call Register (DNCR) blocks track Australian phone numbers that cannot receive SMS or voice calls. Violating DNCR can result in significant fines.

13. Bounce Tracker

/admin/compliance/bounces

Detailed bounce and spam complaint monitoring by client.

Bounce Types

Type	Description	Action
Hard Bounce	Permanent failure (mailbox doesn't exist, domain invalid)	Remove immediately, never retry
Soft Bounce	Temporary failure (mailbox full, server down)	Retry 2-3 times, then remove
Spam	Recipient marked as spam	Add to suppression, analyze content

Client Risk Alert

Clients with >5% bounce rate are flagged "At Risk" and may damage sender reputation. Consider pausing campaigns and cleaning their lead list.

14. Suppression List

/admin/compliance/suppression

Global list of blocked email addresses. Emails on this list will never receive outreach from any client.

Suppression Reasons

Reason	How Added	Can Remove?
Spam	Automatic from spam complaints	No - legal requirement
Unsubscribe	User request via unsubscribe link	Only if user re-opts in
Bounce	Hard bounce auto-added	Yes, if email verified valid
Manual	Admin manually added	Yes, with caution

Actions

- **Add Email:** Manually add an address to block
- **Bulk Import:** Upload CSV of addresses to block
- **Remove:** Delete from list (use with extreme caution)

15. System Overview

/admin/system

Infrastructure health monitoring, Prefect flows, and database stats.

Service Health

Service	Status Indicators	Healthy Metrics
API	Green = Healthy, Yellow = Degraded, Red = Down	99.9% uptime, <100ms latency
Database	Connection pool status, query latency	<50ms p50 latency
Redis	Cache hit rate, connection status	<10ms latency
Prefect	Active workers, flow success rate	All flows succeeding
Webhooks	Endpoint availability	All endpoints responding

Prefect Flows

Flow	Schedule	Purpose
daily-enrichment	2:00 AM daily	Enrich new leads with Apollo/Clay
hourly-outreach	Every hour 8AM-6PM weekdays	Send scheduled messages
reply-recovery	Every 6 hours	Check for missed replies

`billing-sync`

Midnight daily

Sync Stripe data

Database Stats

Shows connection pool usage, query latency percentiles (p50, p95, p99), and table sizes.

16. Error Logs

/admin/system/errors

Application errors and warnings from Sentry integration.

Error Levels

Level	Description	Action
Error	Operation failed, requires attention	Investigate immediately
Warning	Potential issue, operation continued	Monitor, investigate if recurring
Info	Notable event, not a problem	For context only

Common Error Types

Error Type	Cause	Resolution
ConnectionTimeout	External API not responding	Check API status, retry later
RateLimitExceeded	API quota exhausted	Wait for reset, reduce volume
ValidationError	Invalid data format	Check input data quality
AuthenticationError	Invalid API key or credentials	Check and rotate API keys
DatabaseError	Connection or query failure	Check Supabase status

`AIspendLimitError`

Daily AI budget exhausted

Wait for reset or increase
limit

17. Prefect Queues

/admin/system/queues

Flow status and task queue monitoring for the Prefect orchestration system.

Queue Stats

Status	Meaning	Healthy Range
Active	Currently executing	0-5 typical
Pending	Waiting to start	<10 healthy, >50 backlogged
Completed	Finished successfully (24h)	Normal volume varies
Failed	Errors (24h)	<1% of completed

Flow Actions

- **Run Now:** Manually trigger a flow
- **Pause:** Temporarily disable scheduled runs
- **Resume:** Re-enable paused flow

Work Pool

The system uses a dedicated Prefect work pool (`agency-os-pool`) with workers that execute flows. Monitor worker count to ensure capacity.

18. Rate Limits

/admin/system/rate-limits

Resource usage and API limits across all integrated services.

Service Rate Limits

Service	Resource	Daily Limit	Reset Time
Apollo	API Enrichments	100/day	2:00 PM
HeyReach	LinkedIn Actions	17/day/seat	Midnight
Resend	Emails	10,000/day	Midnight
Twilio	SMS	1,000/day	Midnight
Synthflow	Voice Calls	50/day	Midnight
Lob	Mail Pieces	100/day	Midnight
Anthropic	AI Spend (\$)	\$500/day	Midnight

Per-Client Limits (Rule 17)

Channel	Limit	Per
Email	50/day	per sending domain
SMS	100/day	per phone number

LinkedIn	17/day	per seat
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When Limits Are Reached

When a service hits 80%, an alert is triggered. At 100%, outreach pauses automatically until reset. Monitor closely during high-volume campaigns.

19. Platform Settings

/admin/settings

Global configuration, feature flags, and emergency controls.

Limits Configuration

Setting	Description	Default
Daily AI Spend Limit	Maximum Anthropic API spend per day	\$500 AUD
Clay Fallback %	% of leads to enrich via Clay when primary fails	15%

Feature Flags

Flag	Description
Voice Channel	Enable/disable AI voice calls via Vapi
Direct Mail Channel	Enable/disable physical mail via PostGrid
Maintenance Mode	Pause all outreach and show maintenance banner

Notification Settings

- **Alert Email:** Email address for critical alerts
- **Slack Webhook:** URL to post alerts to Slack channel

Danger Zone

Emergency controls for critical situations:

- **Pause All Campaigns:** Immediately stops all outreach
- **Reset Rate Limits:** Clears all counters in Redis
- **Clear Redis Cache:** Flushes all cached data

Use these only in emergencies - they affect all clients.

20. User Management

/admin/settings/users

Manage all users across all clients with role assignments.

User Roles

Role	Access Level
Platform Admin	Full access to all admin pages, all clients
Owner	Full access to their client account
Admin	Manage campaigns, leads, settings for their client
Member	View and basic actions for their client
Viewer	Read-only access

User Statuses

Status	Description
Active	Can login and use platform
Inactive	No activity for 7+ days
Suspended	Account disabled, cannot login

Admin Actions

- **View Details:** See user's full profile
- **Make Admin:** Grant platform admin access
- **Suspend:** Disable account temporarily
- **Unsuspend:** Re-enable suspended account

Glossary of Terms

Reference

Revenue Terms

Term	Definition
MRR	Monthly Recurring Revenue - total subscription revenue per month
ARR	Annual Recurring Revenue - MRR multiplied by 12
ARPU	Average Revenue Per User - MRR divided by active client count
LTV	Lifetime Value - total revenue expected from a client over their lifetime
CAC	Customer Acquisition Cost - cost to acquire a new client
Churn	Rate at which clients cancel subscriptions
Net MRR	New MRR minus Churned MRR

Lead Scoring Terms

Term	Definition
YES Score	Lead qualification score 0-100 based on fit and intent signals
ALS	Agency Lead Score - proprietary lead qualification algorithm
ICP	Ideal Customer Profile - description of the perfect target customer

Hot Lead	Score 70-100, highest priority
Warm Lead	Score 40-69, good potential
Cold Lead	Score below 40, low potential

Operation Modes

Mode	Definition
Autopilot	Fully automated outreach, no approval needed
Co-pilot	AI drafts content, human approves before sending
Manual	Human writes all content, platform assists with delivery

Compliance Terms

Term	Definition
Enrichment	Process of enhancing lead data with additional information
Suppression	Blocking an email from receiving outreach
Hard Bounce	Permanent email delivery failure
Soft Bounce	Temporary email delivery failure
DNCR	Do Not Call Register (Australian phone number registry)

System Terms

Term	Definition
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Rate Limiting	Restricting the number of API calls within a time period
Queue	List of pending tasks waiting to be processed
Webhook	URL endpoint that receives real-time event notifications
Flow	Prefect workflow that executes scheduled tasks
Circuit Breaker	Safety mechanism that stops operations when limits are reached

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For support, contact the platform administrator