Agency OS

User Dashboard Manual

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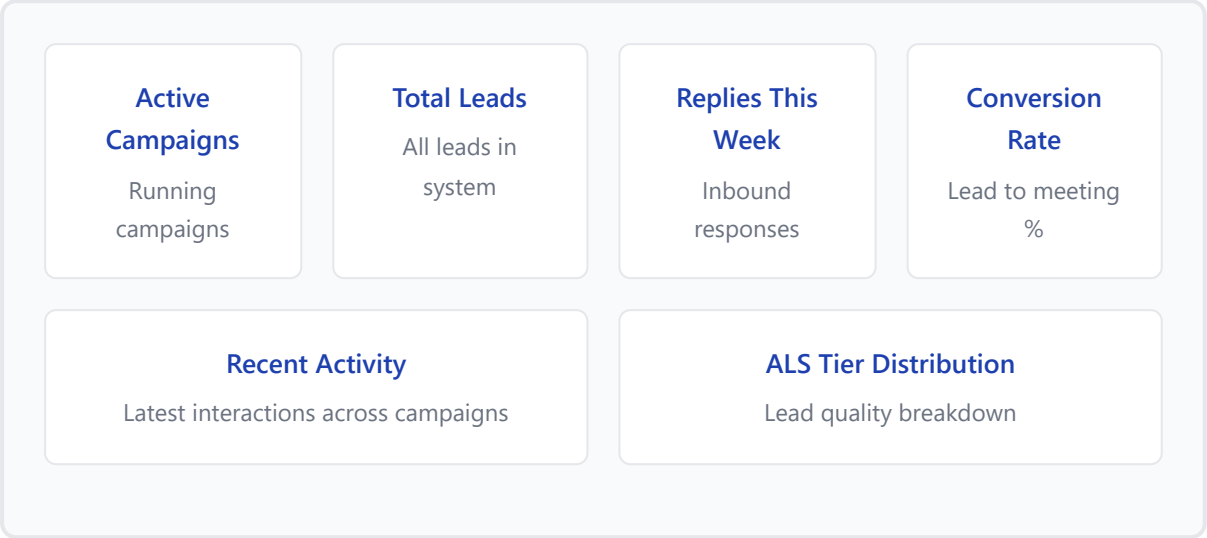
1. Dashboard Overview

`/dashboard`

Your main dashboard provides a real-time snapshot of campaign performance, lead activity, and key metrics. This is the first page you see when logging in.

Page Layout



KPI Cards Explained

Metric	Description	What to Watch For
Active Campaigns	Number of campaigns currently sending outreach	Sudden drops may indicate paused campaigns
Total Leads	All leads across all your campaigns	Growth indicates healthy pipeline
Replies This	Inbound responses received in last 7 days	Goal: Steady week-over-

Week		week growth
Conversion Rate	Percentage of contacted leads that convert to meetings/opportunities	>3% is good <2% needs attention

Recent Activity Feed

The activity feed shows real-time interactions across all your campaigns:

Activity Type	Icon	Description
Reply	Email icon	Lead responded to your outreach
Sent	LinkedIn icon	Connection request or message sent
Enriched	User icon	Lead data enhanced with additional information

Intent Badges

Replies are automatically classified by AI to help you prioritize:

- Interested - Lead wants to learn more
- Meeting Request - Lead wants to schedule a call
- Question - Lead needs information
- Not Interested - Lead declined

ALS Tier Distribution

This chart shows the quality breakdown of your leads using the Agency Lead Score (ALS) system:

Tier	Score Range	Meaning	Priority
Hot	90-100	Ideal fit, high intent signals	Highest - multi-channel engagement

Warm	70-89	Strong match, good potential	High - email + LinkedIn
Cool	50-69	Moderate match	Medium - email sequence
Cold	30-49	Weak match	Low - nurture only
Dead	0-29	Poor fit or invalid data	None - excluded from outreach

Tip: Focus on Hot and Warm Leads

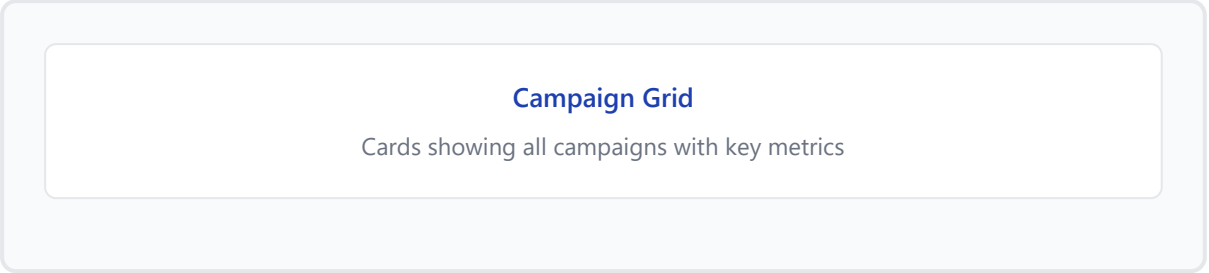
Your best ROI comes from Hot and Warm leads. A healthy pipeline should have at least 20% of leads in these top tiers.

2. Campaigns List

`/dashboard/campaigns`

View and manage all your outreach campaigns from this central hub. Each campaign represents a targeted outreach effort to a specific audience.

Page Layout



Campaign Card Information

Element	Description
Campaign Name	Descriptive name for the campaign (e.g., "Tech Startups Q1 2025")
Status Badge	Active - Running | Paused - Stopped | Draft - Not launched
Description	Brief summary of target audience
Leads Count	Total number of leads in this campaign
Replies Count	Number of responses received
Reply Rate	Percentage of contacted leads that replied

Channel Allocation Bar	Visual breakdown of outreach channels used

Channel Allocation Colors

Channel	Color	Description
Email	Blue	Resend-powered email outreach
SMS	Green	Twilio-powered text messages
LinkedIn	Sky Blue	HeyReach-powered social outreach
Voice	Purple	Synthflow AI voice calls

Campaign Actions

Click the menu icon on any campaign card for actions:

- **Pause Campaign** - Temporarily stop all outreach (Active campaigns)
- **Resume Campaign** - Restart paused campaigns
- **Activate Campaign** - Launch a draft campaign

> **Reply Rate Benchmarks**
>
> **>8%** - Excellent | **5-8%** - Good | **2-5%** - Average | **<2%** - Needs improvement

3. Create New Campaign

`/dashboard/campaigns/new`

Set up a new outreach campaign with this step-by-step form. Configure your target audience, automation level, and channel mix.

Campaign Setup Steps

Step 1: Basic Information

Field	Description	Example
Campaign Name	Clear, descriptive name for internal reference	"Tech Startups Q1 2025"
Description	Brief summary of target audience and goals	"Series A-B tech startups in Australia"
Daily Outreach Limit	Maximum leads to contact per day (1-500)	50

Step 2: Permission Mode

Choose your automation level. This determines how much control you have vs. how much the AI handles automatically:

Mode	Description	Best For
Autopilot	Full automation. AI handles all decisions autonomously without requiring your approval.	Experienced users with established templates

Co-Pilot (Recommended)	AI suggests content and decisions, you approve before sending. Best balance of automation and control.	Most users - best results with oversight
Manual	Full control. Review and approve every single action before it happens.	High-stakes campaigns, learning the platform

Step 3: Channel Allocation

Distribute your outreach across channels. Allocations must sum to 100%.

Channel	Recommended %	Notes
Email	50-70%	Primary channel, most scalable
SMS	10-20%	High engagement, use for warm leads
LinkedIn	20-30%	Professional audience, B2B focused
Voice	0-10%	Reserve for hot leads only

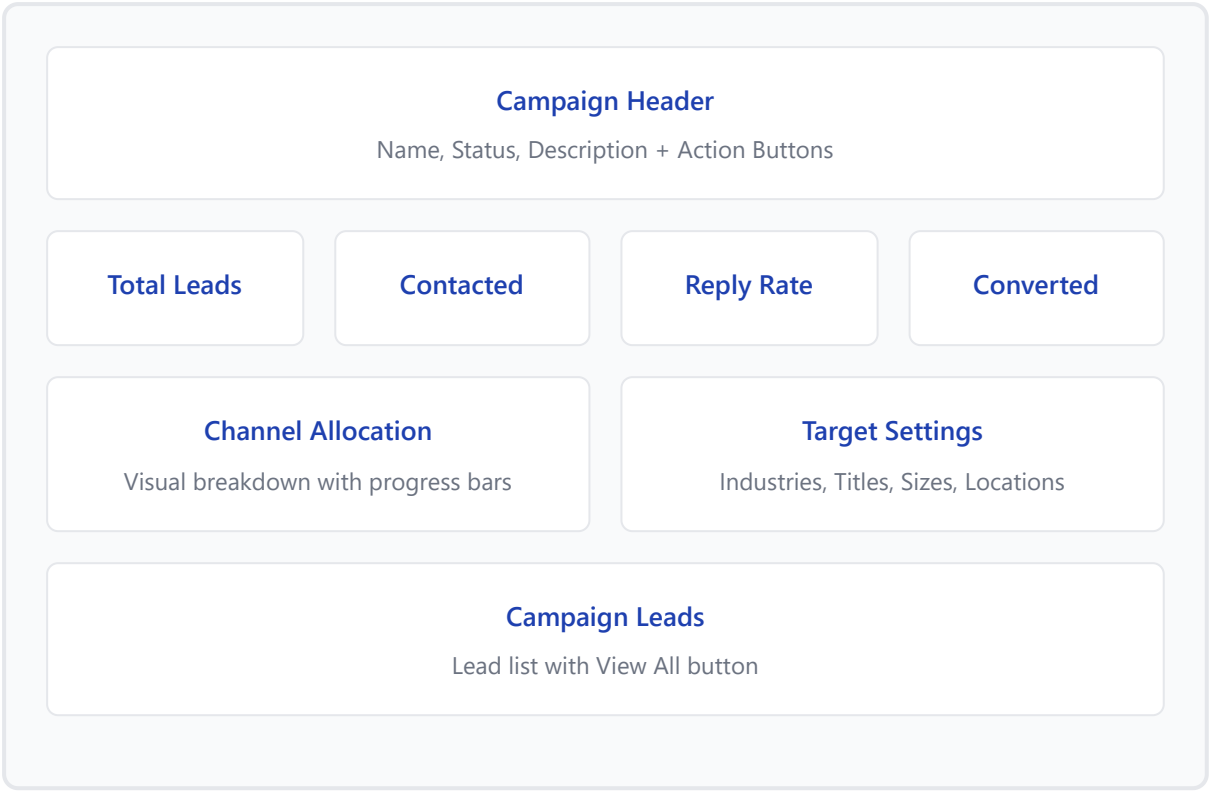
> **Validation Required**
>
> Channel allocations must add up to exactly 100%. The form will show an error if the total is incorrect.

4. Campaign Detail

`/dashboard/campaigns/[id]`

Deep dive into a specific campaign's performance, settings, and leads.

Page Layout



Campaign Stats

Metric	Description	Good Benchmark
Total Leads	All leads added to this campaign	Varies by campaign scope

Contacted	Leads that received at least one outreach	Should grow daily based on limit
Reply Rate	(Replies / Contacted) x 100	>5%
Converted	Leads that became opportunities	Ultimate success metric

Target Settings Display

Shows the ICP (Ideal Customer Profile) criteria for this campaign:

- **Industries** - Technology, SaaS, Fintech, etc.
- **Job Titles** - CEO, CTO, Founder, VP Engineering, etc.
- **Company Sizes** - 10-50, 51-200, 201-500 employees
- **Locations** - Sydney, Melbourne, Brisbane, etc.

Campaign Actions

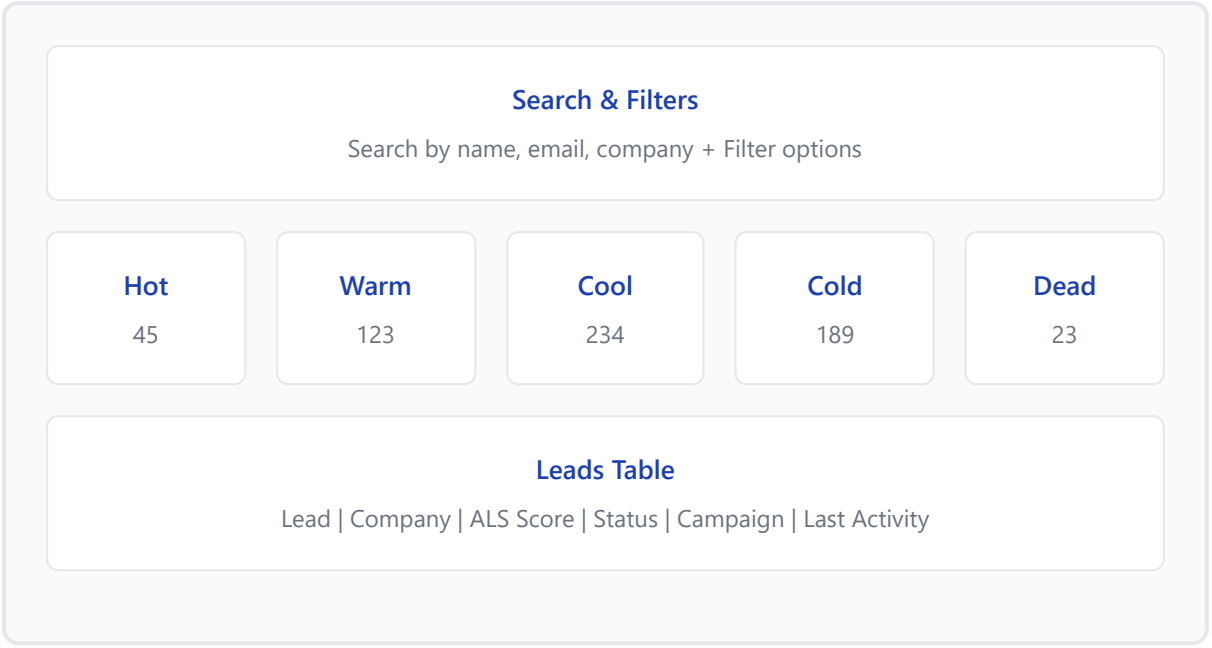
Action	When to Use
Pause	Temporarily stop outreach (e.g., holiday period, need to adjust messaging)
Activate	Resume a paused campaign or launch a draft
Settings	Modify campaign configuration
View All Leads	Navigate to leads page filtered by this campaign

5. Leads List

`/dashboard/leads`

View and manage all leads across your campaigns. Filter by tier, status, or campaign to focus on specific segments.

Page Layout



Lead Table Columns

Column	Description
Lead	Name and email address
Company	Company name and job title
ALS Score	Numeric score (0-100) with tier badge

Status	Current state in the outreach process
Campaign	Which campaign this lead belongs to
Last Activity	Most recent action or event for this lead

Lead Statuses

Status	Description
New	Just added, not yet processed
Enriched	Data enhanced but not yet scored
In Sequence	Actively receiving outreach
Converted	Became an opportunity or customer
Unsubscribed	Opted out of communications

Actions

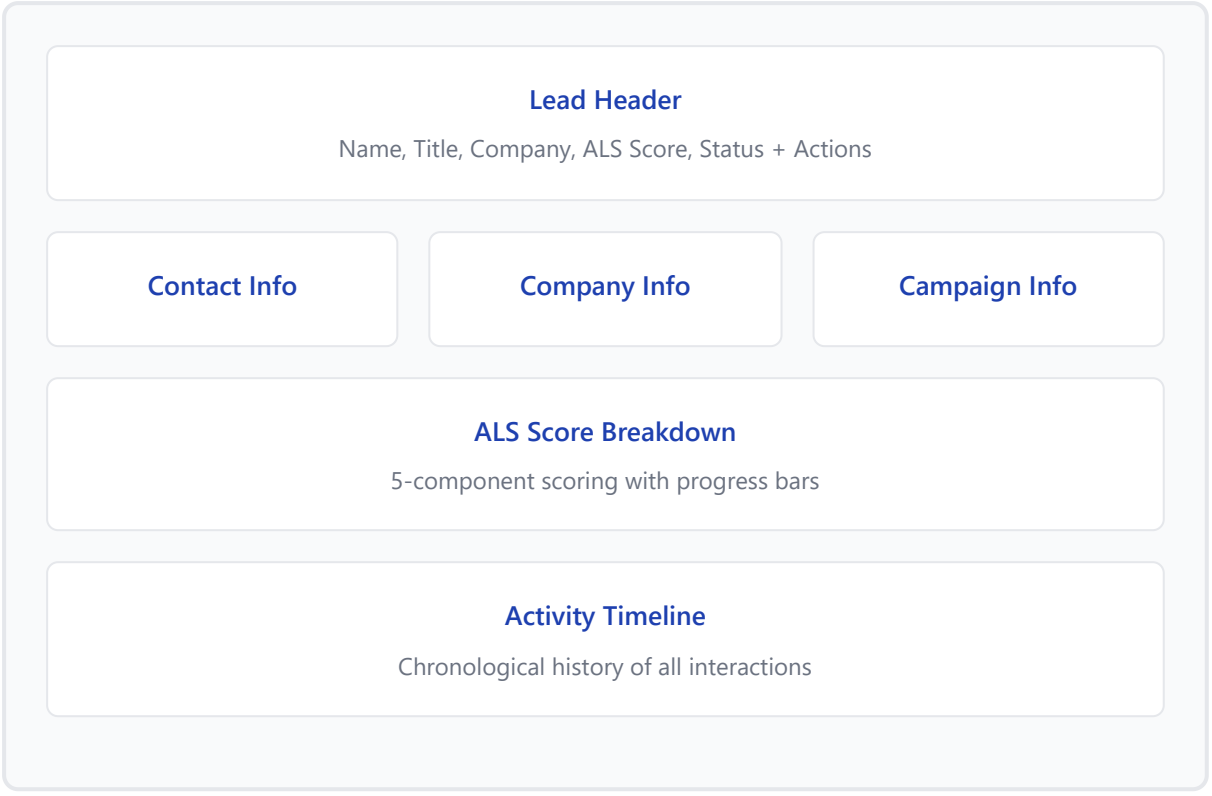
- **Export** - Download leads as CSV
- **Import** - Upload new leads from CSV
- **Filters** - Refine by tier, status, campaign, date

6. Lead Detail

`/dashboard/leads/[id]`

Complete view of a single lead including contact info, company details, ALS score breakdown, and activity timeline.

Page Layout



ALS Score Components

The Agency Lead Score is calculated from 5 weighted components:

Component	Weight	What It Measures
Data	20%	Completeness and accuracy of contact data (email verified,

Quality		phone valid, etc.)
Authority	25%	Decision-making power based on job title and seniority
Company Fit	25%	Match with your Ideal Customer Profile (industry, size, revenue)
Timing	20%	Buying signals like recent funding, growth hiring, tech stack changes
Risk	10%	Deliverability risk (bounce probability, spam likelihood)

Activity Timeline

Shows all interactions with this lead in chronological order:

Channel	Dot Color	Example Events
Email	Blue	Email sent, Email opened, Email clicked, Reply received
SMS	Green	SMS sent, SMS delivered, Reply received
LinkedIn	Sky	Connection sent, Message sent, Connection accepted
System	Gray	Lead created, Lead enriched, Score updated

Lead Actions

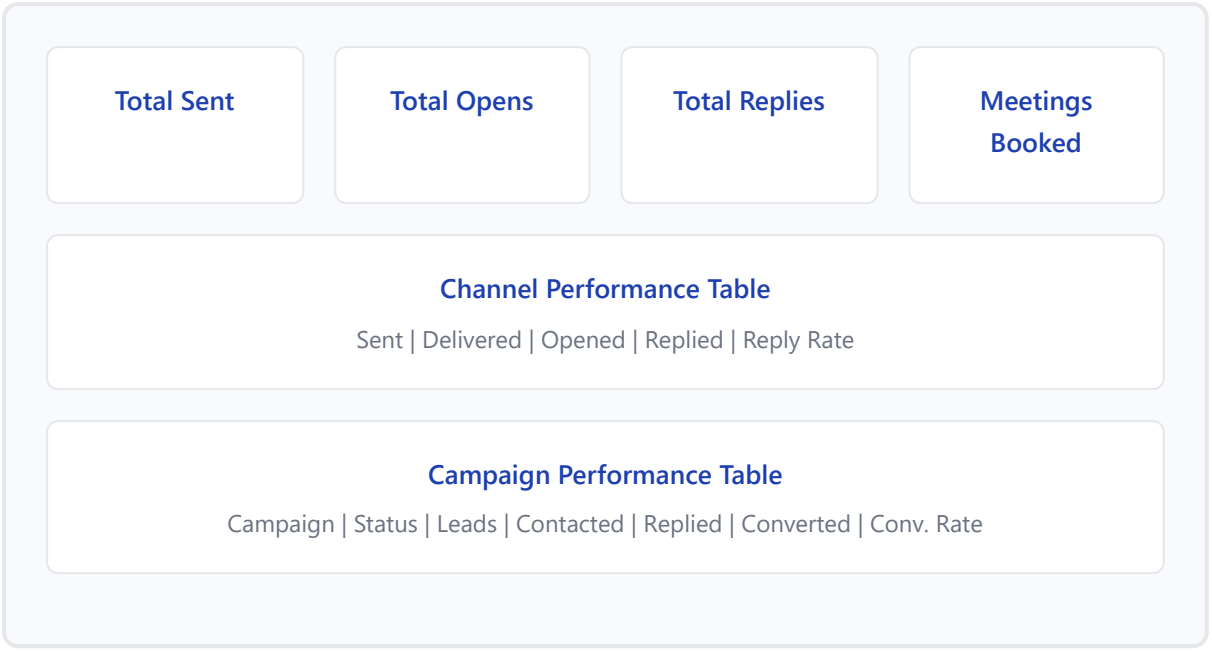
- **Send Email** - Compose and send a manual email
- **Re-score** - Trigger a fresh ALS calculation

7. Reports & Analytics

`/dashboard/reports`

Comprehensive analytics and performance metrics for all your campaigns.

Page Layout



Overview Metrics

Metric	Description	Good Benchmark
Total Sent	All outreach messages sent across all channels	Varies by volume
Total Opens	Emails and LinkedIn messages opened	>30% open rate
Total Replies	Inbound responses received	>5% reply rate

Meetings Booked	Calls/demos scheduled from outreach	Ultimate success metric

Channel Performance

Compare effectiveness across different outreach channels:

Channel	Typical Reply Rate	Best Use Case
Email	2-4%	Primary channel, scalable outreach
SMS	3-6%	High engagement, use selectively
LinkedIn	1-3%	Professional B2B, relationship building

Date Range

Use the date picker to adjust the reporting period. Default is last 30 days.

Export

Click "Export Report" to download a comprehensive PDF or CSV of all metrics.

8. Account Settings

`/dashboard/settings`

Manage your organization, profile, default settings, and integrations.

Settings Sections

Organization

Field	Description
Organization Name	Your company or team name
Subscription Tier	Current plan (Ignition / Velocity / Dominance)

Profile

Field	Description
Full Name	Your display name
Email	Login email address

Default Permission Mode

Set the default automation level for new campaigns:

Mode	Description
Autopilot	Full automation, AI handles everything
Co-Pilot	AI suggests, you approve key decisions

Manual	Full control over every action

Integrations

View connection status for external services:

Integration	Purpose
Apollo	Lead enrichment data
LinkedIn (HeyReach)	LinkedIn automation
Resend	Email sending
Twilio	SMS sending

> **Danger Zone**
>
> **Delete Organization** - Permanently deletes your organization and all associated data. This action cannot be undone.

Understanding ALS Scoring

Reference

The Agency Lead Score (ALS) is a proprietary algorithm that predicts how likely a lead is to convert. Understanding the components helps you improve lead quality.

Score Calculation

Total ALS = (Data Quality x 0.20) + (Authority x 0.25) + (Company Fit x 0.25) + (Timing x 0.20) + (Risk x 0.10)

Component Details

Data Quality (20%)

Factor	Points
Verified email address	+25
Valid phone number	+20
LinkedIn profile found	+20
Complete company data	+20
Recent activity detected	+15

Authority (25%)

Title Level	Score
C-Level (CEO, CTO, CFO)	95-100

VP / Director	80-94
Senior Manager	60-79
Manager	40-59
Individual Contributor	20-39

Company Fit (25%)

Criteria	Match	Score Impact
Industry	Exact match to ICP	+30
Company Size	Within target range	+25
Revenue	Within target range	+25
Location	Target geography	+20

Timing (20%)

Signal	Score Boost
Recent funding round	+30
Job postings in relevant areas	+25
Tech stack changes	+20
Company expansion signals	+15

Risk (10%)

Factor	Score Impact

Low bounce probability	+40
No spam history	+30
Not on suppression lists	+30

Improving Your ALS Distribution

To increase the percentage of Hot and Warm leads: 1) Refine your ICP criteria, 2) Use higher quality data sources, 3) Target decision-makers specifically, 4) Look for timing signals like funding or hiring.

Permission Modes Guide

Reference

Choose the right automation level for your campaigns based on your experience, risk tolerance, and desired control level.

Autopilot Mode

Feature	Behavior
Lead Enrichment	Automatic - no approval needed
Content Generation	AI writes and sends automatically
Channel Selection	AI decides based on lead score and availability
Send Approval	Not required - messages send immediately
Reply Handling	AI classifies and may auto-respond to simple queries

Best For

Experienced users with established templates and messaging that has proven effective. Maximum throughput with minimal oversight.

Co-Pilot Mode (Recommended)

Feature	Behavior
Lead Enrichment	Automatic - no approval needed

Content Generation	AI drafts, you review and approve
Channel Selection	AI suggests, you can override
Send Approval	Required for initial sends, optional for follow-ups
Reply Handling	AI classifies and drafts response for your approval

Best For

Most users. Balances AI efficiency with human oversight. You maintain control while benefiting from AI suggestions.

Manual Mode

Feature	Behavior
Lead Enrichment	Requires approval before processing
Content Generation	You write all content (AI can assist if asked)
Channel Selection	You choose for each lead
Send Approval	Required for every single message
Reply Handling	You handle all responses manually

Best For

New users learning the platform, high-stakes campaigns requiring careful oversight, or situations where every message must be personally crafted.

Changing Modes

You can change a campaign's permission mode at any time in Campaign Settings. The new mode applies to all future actions; past actions are not affected.

Glossary of Terms

Reference

Campaign Terms

Term	Definition
Campaign	An organized outreach effort targeting a specific audience
Sequence	Multi-step outreach plan with defined touchpoints
Touchpoint	Single point of contact (email, SMS, LinkedIn message, etc.)
Daily Limit	Maximum leads to contact per day
Channel Allocation	Percentage distribution across outreach channels

Lead Terms

Term	Definition
Lead	A potential customer contact in your database
ALS (Agency Lead Score)	Proprietary 0-100 score predicting conversion likelihood
ICP (Ideal Customer Profile)	Description of your perfect target customer
Enrichment	Process of enhancing lead data with additional information

Conversion	When a lead becomes an opportunity or customer

Tier Terms

Term	Definition
Hot Lead	ALS 90-100, ideal fit with high intent
Warm Lead	ALS 70-89, strong match with good potential
Cool Lead	ALS 50-69, moderate match
Cold Lead	ALS 30-49, weak match
Dead Lead	ALS 0-29, poor fit or invalid data

Channel Terms

Term	Definition
Email	Outreach via email (powered by Resend)
SMS	Text message outreach (powered by Twilio)
LinkedIn	Social outreach via LinkedIn (powered by HeyReach)
Voice	AI phone calls (powered by Synthflow)
Direct Mail	Physical mail pieces (powered by Lob)

Mode Terms

Term	Definition

Autopilot	Fully automated, no approval needed
Co-Pilot	AI suggests, human approves
Manual	Human controls everything

Metric Terms

Term	Definition
Reply Rate	(Replies / Contacted) x 100
Conversion Rate	(Converted / Contacted) x 100
Open Rate	(Opens / Delivered) x 100
Bounce Rate	(Bounces / Sent) x 100