

Agency OS

Admin Dashboard Manual

Version 3.0 | December 2025

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Reference

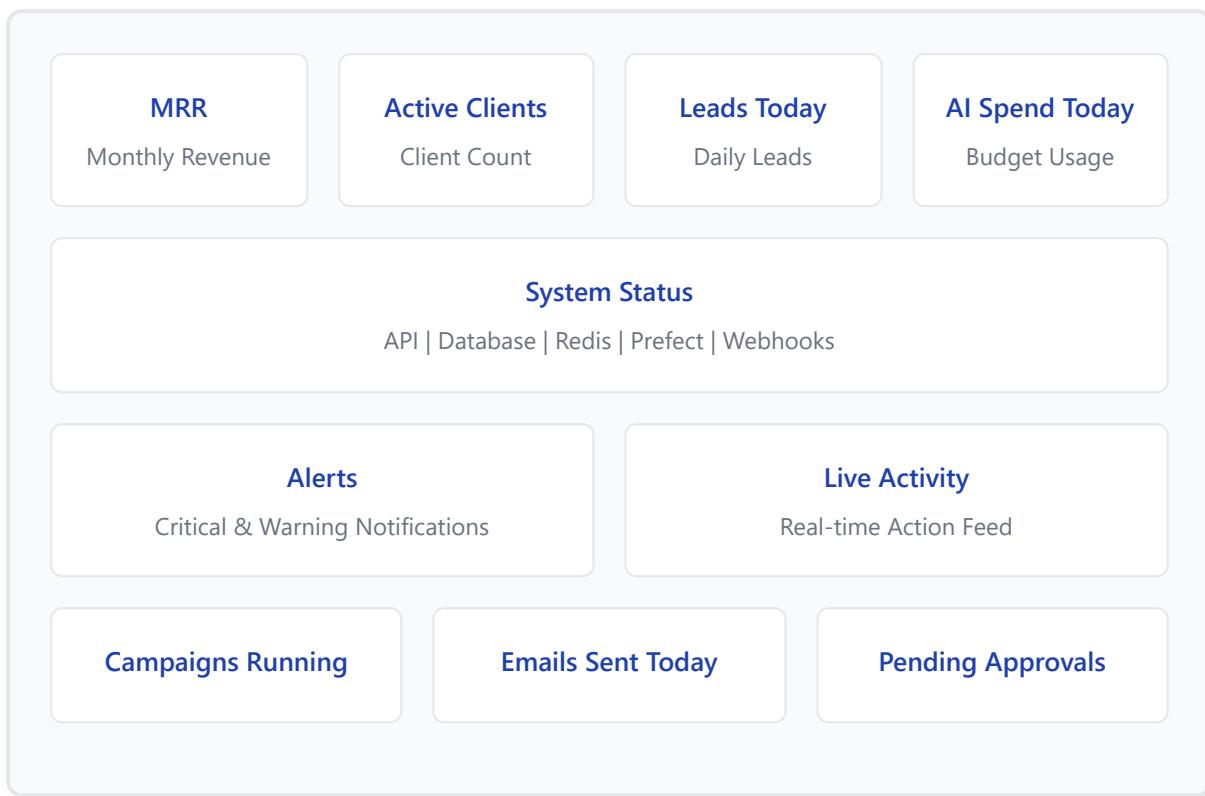
Glossary of Terms

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 |
|--------|--------|-------------|------------------|
| | | | |

| | | | |
|-----------------------|------------------------|---|---------------------------|
| 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:

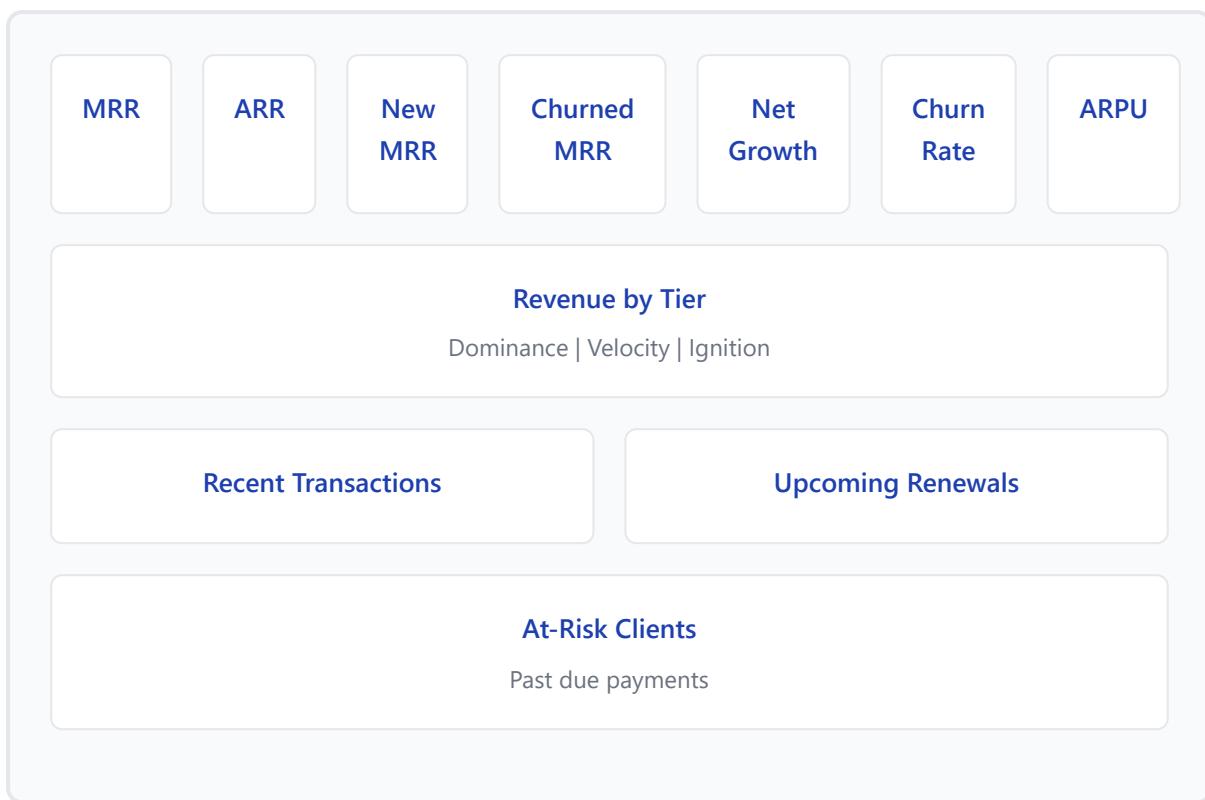
- **Email sent** - Outbound email dispatched
- **Lead enriched** - Contact data enhanced with ALS score
- **Reply received** - Inbound response detected
- **LinkedIn sent** - Connection request or message sent
- **SMS sent** - Text message dispatched
- **Voice call** - AI call completed
- **Mail sent** - 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% | <2% 2-5% >5% |
| 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

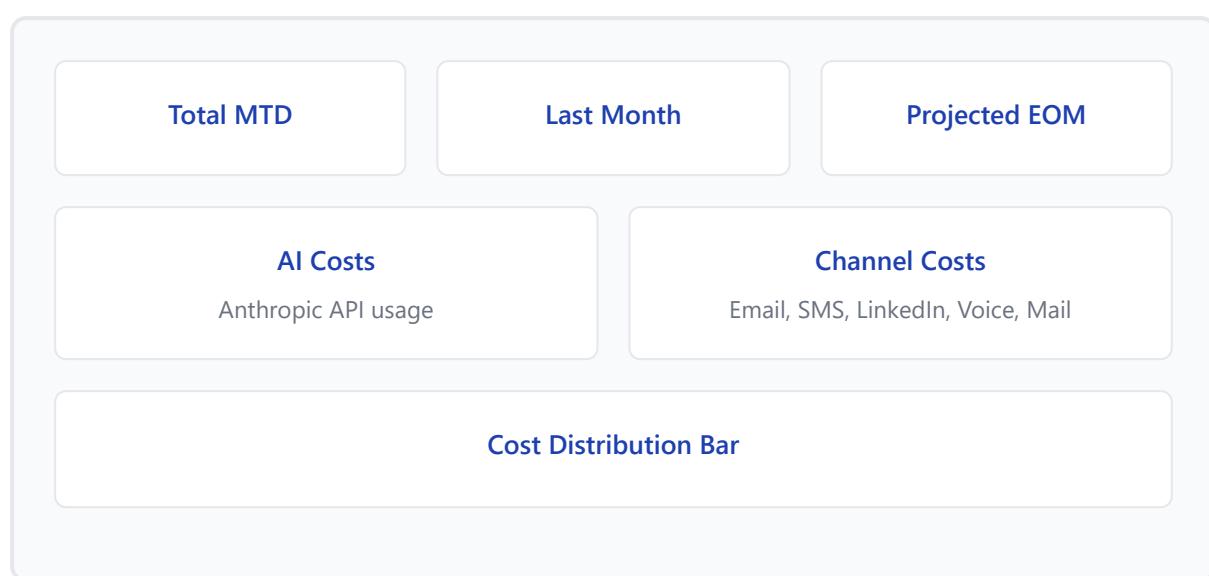
Shows clients with past-due payments. Take immediate action: contact client, check Stripe, consider service suspension if >7 days overdue.

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

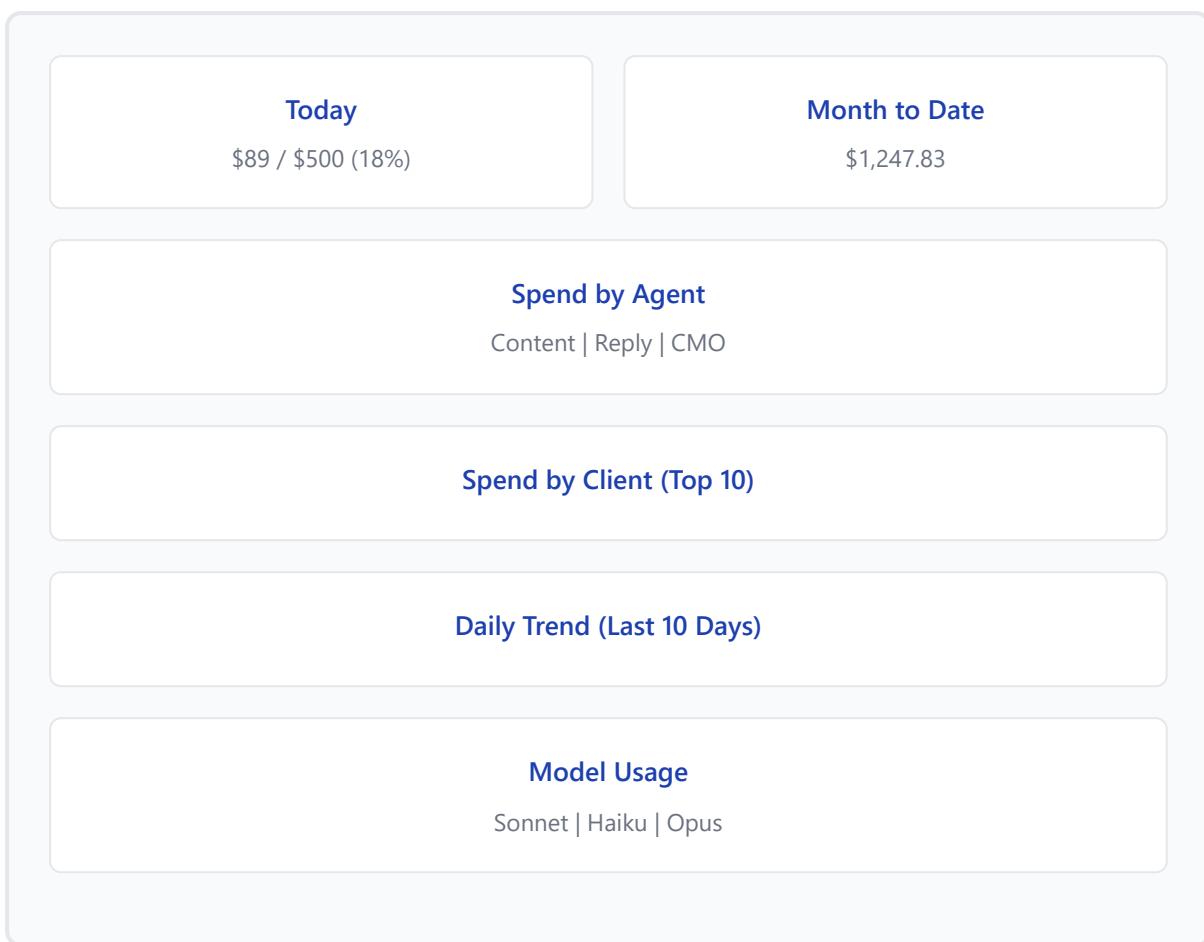
Target: 75%+ gross margin. Calculate as: $(MRR - \text{Total Costs}) / MRR \times 100$. If margin drops below 70%, investigate high-cost clients or inefficient operations.

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 |
|---------|--|-----------------------|
| Content | Generates new content based on user prompts. | ~15% |

| | | |
|----------------------|--|------|
| 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 style="background-color: #FFF; border-radius: 10px; padding: 5px; display: inline-block;"> >24h </div> <div style="background-color: #FFF; border-radius: 10px; padding: 5px; display: inline-block; margin-top: 5px;"> >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 |
|--------|-------------|
|--------|-------------|

| | |
|--------------------|---|
| 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

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 |
|------|------------|
|------|------------|

| | |
|------------------------|--|
| 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