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## Manage Users

[+ Add New User](#)[Admin Users](#)[SE Users](#)

Name	Email	Phone	Cost Rate	Bill Rate	Assigned Clients	Actions
 John Smith	john@example.com	+1 234 567 8900	\$75/hr	\$150/hr	<a href="#">Client A</a> <a href="#">Client B</a>	 

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Total Workflows ↑ 12%

2,847

Total Exceptions ↓ 8%

156

Time Saved ↑ 24%

1,284h

Revenue ↑ 16%

\$847K

Active Clients ↑ 5%

128

All Clients

[+ Add Client](#)

Client Name	Contract Start	Workflows	Nodes	Executions	Exceptions	Revenue	Time Saved	Money Saved
Acme Corp	Jan 15, 2025	24	156	1,847	12	\$24,500	284h	\$42,600



## Add New Client

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Company Name\*

Enter company name

Company URL\*

https://

Users

Name	Email	Phone	Department	Exceptions	Access
<input type="text" value="Full name"/>	<input type="text" value="Email"/>	<input type="text" value="Phone"/>	<input type="button" value="Select Department"/>	<input type="checkbox"/> Email <input type="checkbox"/> SMS	<input type="checkbox"/> Billing Access <input type="checkbox"/> Admin Access

+ Add User

Assign Solutions Engineers

Name	Email	Actions
<input type="button" value="Select SE"/>	email@example.com	<input type="button" value="Delete"/>

+ Add Solutions Engineer

Cancel

Create Client



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Overview

Client Workflows

## Assigned Support Engineers

John Smith  
Lead SESarah Johnson  
Support SE

### Client Users

Name	Email	Phone	Billing	Admin	Notes
Robert Wilson	robert@company.com	+1 555-0123	✓	✓	Primary contact
Emily Brown	emily@company.com	+1 555-0124	—	—	Technical lead

### Document Links

Survey Questions

<https://docs.example.com/survey>

Survey Results

<https://docs.example.com/results>

Process Documentation

<https://docs.example.com/process>

ADA Proposal

<https://docs.example.com/proposal>

Contract

<https://docs.example.com/contract>

Factory Markdown

<https://docs.example.com/factory-markdown>

Test Plan

<https://docs.example.com/test-plan>

### Pipeline Progress

- Discovery: Initial Survey**  
Completed on Jan 15, 2025

- Discovery: Process Deep Dive**  
Completed on Jan 20, 2025

- ADA Proposal Sent**  
Completed on Jan 25, 2025

- ADA Proposal Review**  
Mark Complete

- ADA Contract Sent**

- ADA Contract Signed**

- Credentials Collected**

- Factory Build Initiated**

- Test Plan Generated**

- Testing Started**

- Production Deploy**

Overview

Client Workflows

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## Workflows

Add Workflow

Create Date	Department	Workflow Name	# of Nodes	# of Executions	# of Exceptions	Time Saved	\$ Saved	Status
Jan 15, 2025	Sales	Lead Processing	12	234	2	30 min	75 USD	<input checked="" type="checkbox"/> <a href="#">ROI Report</a>
Jan 10, 2025	HR	Onboarding	8	45	0	120 min	180 USD	<input checked="" type="checkbox"/> <a href="#">ROI Report</a>



## Plan Manager

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Name	Pricing Model	Contract Length	Billing Cadence	Setup Fee	Prepayment %	\$ Cap	Overage Cost	# Clients
Enterprise Pro	Tiered	12 months	Monthly	\$5,000	25%	\$100,000	\$150/hr	12
Business Plus	Fixed	6 months	Quarterly	\$2,500	15%	\$50,000	\$125/hr	28
Starter	Usage	3 months	Monthly	\$1,000	10%	\$25,000	\$100/hr	45



## Add New Plan

- Dashboard
- Users
- Clients
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Enter plan name  Fixed

\$

AIR Direct  Month

Monthly  \$

%  \$

\$



## Exceptions



- Dashboard
- Users

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Exceptions

Client name	Exception type	Severity						
All clients	All types	All severities						
Datetime reported	Client name	Department	Workflow name	Notifications	Exception type	Severity	Remedy	Status
2025-05-14 12:30:00	Acme Corp	Finance	Invoice Processing	+2 more	Integration	Critical	API timeout	New



Dashboard

Workflow ROI

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Messaging

## Third Party Services

 Slack  GitHub Jira Salesforce AWS Slack Credentials Connected

Workspace URL

acme-corp.slack.com

Bot User OAuth Token

xoxb-\*\*\*\*\*

Signing Secret

\*\*\*\*\*

Save Changes