

AgencyCRM

Dashboard



Dashboard

Leads

Clients

Tasks

Analytics

Settings

Total Leads

1,284

+ 12% from last month

Active Client

86

+ 5 new this week

Revenue

\$42,580

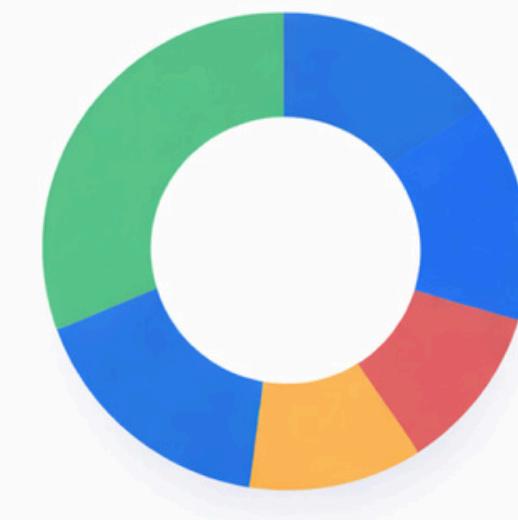
+ 18% growth

Pending Tasks

23

5 Overdue

Monthly Lead Conversions



converted Leads

- New
- Contracted
- Proposal Sent
- Converted
- Lost

Recent Activity

- Samantha Lee moved to Proposal stage 2h ago
- \$ 5,000 deal marked as Won Yesterday
- Follow-up task-created for TechNova Yesterday
- Client "BrightMedia" saided 2 days ago

Log Out

Upcoming Tasks

- Call Samantha Lee Today 3:00 PM
- Send proposal to TechNova Tomorrow
- Follow-up with ApexSolutions Friday
- Review contract 20 March

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Filter

Soft

+ Filter

+ New Lead

New Lead (12)

Contracted (9)

Proposal Sent (6)

Converted (14)

Tyler Bennett



Harizon Fitness

\$ 3,000

\$ 3,600

Michelle Ward



Apex Solutions

Warm

\$ 5,300

Samantha Lee



Macie Fstivie

\$ 18,550

\$ 18,900

Phoenix Web Works



Aearthelue

\$ 10,500

\$ 10,500

Sarah Fowler



BrightMedia

Hot

\$ 5,300

David Clarkson



TechNova

Hot

\$ 5,300

Laura Spencer



Horizon Marketing

Hot

\$ 7,400

NextGen Systems



Tour Hoea

Converted

\$ 6,900

John Carter



Carter Enterprises

Cold

\$ 2,200

Madison Hill



Gooythhy

Lost

\$ 9,800



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Filter

Expert

+ Filter

+ Add Client

Client Name	Company	Email	Phone	Status	Assigned Manager	Time
Samantha Phone	BrighWave Solutions Honaeon	samantha@wave.com	(123) 456-7890	Warm	Daniel w.	Today
Tyler Bennett	Innovate Tech Ashok Softech	tyler@innovate.com	(100) 522-8100	Active	Lisa K.	Yesterday
Michelle Ward	Apex Solutions Taus Branch	michell@apex.com	(190) 466-7800	Cold	Jason T.	Yesterday
David Clarkson	TechNova Hechy More	david@technova.com	(120) 366-7990	Hot	Rachel P.	2 days ago
Laura Spencer	Horizon Marketing Kioh Horizon	lauratyler@horizon.com	(103) 236-7600	Warm	Emily B.	2 days ago
John Carter	Carter Enterprises Sor Chhcoth	john@carteribe.com	(103) 229-6900	Cold	Mark T.	3 days ago
Sarah Fooner	Bright Media Sorizon Mave	sarah@brighmedia.com	(160) 299-5000	Hot	Julla M.	3 days ago
Bpandom Hancla	Phenic Web Works Reach Sech	brandon@phenic.com	(105) 769-4300	Warm	Kovin S.	a week ago
Danielle Show	Growthly.jo Latshhlp	danielle@growthly.in	(100) 295-7700	Warm	Michad C.	a week ago



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All

Today (2)

Upcoming (2)

Overdue (1)

Completed (3)

+ Add Task

Today

 Call Samantha Lee

● Apex Solutions

Today @ 3:00 PM

High

 Review Contract

● BrightWave

Today @ 5:00 PM

Medium

Upcoming

 Send proposal to TechNova

Tomorrow

Medium

 Follow-up with Apex Solutions

2 days

Low

Overdue

 Prepare invoice for BrightMedia

2 days overdues

Medium

Completed

 Review campaign performance

Todays

Completed



Dashboard

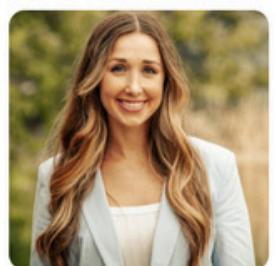
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Samantha Hayes

Marketing Manager

BrightWave Solution

Warm

samantha.hayes@brightwave.com

>

(123) 456-7900

>

San Francisco, CA

Call

Send Email

Schedule Meeting

Deal Overview

2

Active Deals

\$185,500

Total Revenue

3

Open Tasks

Recent Notes

- Interested in SEO + Paid Ads
- Budget Approved
- Proposal Reviewed

Activity Timeline



2 hours ago
Proposal Updated

Samantha Hayes proposal updated.



Yesterday
Call completed

Call completed with Samantha Hayes.



2 days ago
Contract shared

Shared contact with Samantha Hayes.



2 days ago
Initial meeting

Initial meeting mail with Samantha Hayes