FULL V1 SCOPE OF WORK

Paid Media Performance Dashboard (V1)

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1. Project Summary

The Paid Media Performance Dashboard will allow Stephen's clients to securely log in and view their campaign performance data in a modern, intuitive SaaS interface. Data will be delivered daily via S3, ingested into a database, recalculated according to client-specific CPM values, and visualized across campaign, strategy, placement, and creative levels.

V1 will combine all functionality originally outlined in Phase 1 and Phase 2.

2. V1 Deliverables (Phase 1 + Phase 2 Combined)

Below is the complete functionality included in the V1 build.

2.1 Data Ingestion & Processing

Daily S3 Ingestion (Required)

- Automated pull of daily CSV files from Stephen's S3 bucket
- Scheduled run (approx. 3–4 AM EST)
- Full ingestion pipeline:

  - File retrieval
  - Validation
  - Parsing
  - Transformation
  - Storage

Weekly + Monthly Summary Pipelines

- Automated weekly summary creation
- Automated monthly summary creation

Historical Import

- One-time ingestion of historical files provided in S3

2.2 Data Transformation Logic

Client-Specific CPM Calculation

Incoming data uses a default CPM rate ($17).
 For each client, their custom CPM replaces the default, and spend is recalculated:

Spend = (Impressions / 1,000) × Client CPM

Because of this:

- Spend is affected
- CPC, CPA, and ROAS (if displayed) use recalculated spend
- CTR, impressions, clicks, conversions, and revenue remain unchanged

Derived Metrics Included in V1

- Spend (adjusted)
- CPC
- CPA
- Optional ROAS (Conversion Revenue / Spend)
- CTR (Clicks / Impressions)

2.3 Admin Controls (Stephen Only)

Admin Portal Includes:

- Add new client
- Edit client CPM
- Reset client passwords
- Toggle client access (enable/disable)
- View data ingestion logs
- View errors/alerts

2.4 User Authentication System

- Admin-created account
- Email + password login

- No 2FA required
- Secure session management (JWT)
- Password reset via admin only

2.5 Dashboard UI (Client-Facing)

Design Requirements

- Modern SaaS look (not minimalist)
- Clean color palette
- Responsive on desktop and tablet
- Minimal mobile support required

Layout: One Long Scroll Page

Sections appear in this order:

1. **Top Summary Overview**

   - Impressions
   - Clicks
   - CTR
   - Conversions
   - Conversion Revenue
   - Spend (adjusted)
   - CPC
   - CPA
   - ROAS (optional)

2. **Campaign Performance**

   - Table + charts
   - Filter by date + campaign

3. **Strategy Performance**
4. **Placement Performance**
5. **Creative Performance**

   - Table view
   - Performance metrics
   - Optional "creative preview" box (later upgrade if image URLs included)

6. **Weekly Summary Module**
7. **Monthly Summary Module**

2.6 Filtering & Controls

Included Filters:

- Date range picker
- Campaign
- Strategy
- Creative

Sorting:

- Clicks
- Conversions
- Revenue
- Spend
- CTR
- CPC
- CPA

2.7 Export Functionality (Included in V1)

- PDF export (auto-formatted)
- CSV export (raw or filtered dataset)

2.8 Data Quality & Error Handling

Alerts Included in V1

Email alerts sent to Stephen if:

- Daily S3 file is missing
- CSV format is corrupted
- Ingestion fails
- Data validation checks fail

In-Dashboard Error Log (Admin Only)

- Timestamp
- File name
- Error description
- Status (resolved/unresolved)

2.9 Summary Reporting (Delivered Inside Dashboard)

Weekly Summary Features

- Total metrics for the week
- Top performing campaigns
- Underperforming elements
- Week-over-week deltas

Monthly Summary Features

- Month totals
- Spend vs revenue
- Top creatives
- Key movements month-over-month

3. Deliverables Not Included in V1

(These may be included in a future V2 or expanded version)

- SEO data integration
- GA4 data integration
- CRM attribution
- Multi-role access levels
- Client-managed user accounts
- White-label branding per client
- Automatic dashboard creation at client onboarding
- Real-time data ingestion
- Complex pacing or forecasting models

4. Technical Stack (Recommended)

Frontend

- Next.js (React-based)
- Tailwind or custom modern design system
- Recharts or Tremor for data visualization

Backend

- Node.js or Python FastAPI
- Server-side ingestion cron job
- Auth logic

- Data transformation microservice

Database

- PostgreSQL (hosted in AWS RDS or Supabase)

Hosting

- Vercel (frontend)
- AWS (backend + database + S3 integration)

5. Milestones

1. **Architecture & Database Setup**

2. **S3 Ingestion Pipeline (Daily + Historical)**

3. **Admin Portal + CPM Controls**

4. **Authentication System**

5. **Dashboard UI Build (all sections)**

6. **Derived Metrics & CPM Logic**

7. **Summary Reporting (Weekly/Monthly)**

8. **Export Tools (PDF/CSV)**

9. **Alerts & Error Handling**

10. **Final QA + Client Review**

11. **Deployment & Live Testing**

6. Acceptance Criteria

V1 is considered complete when:

- Daily ingestion runs successfully with no errors
- All core dashboard sections display data correctly
- CPM calculations are accurate per client

- Admin portal functions as intended
- All filters work
- PDF and CSV exports download successfully
- Weekly + monthly summaries generate correctly
- Login and roles behave as defined
- UI matches modern SaaS styling expectations

7. Handoff Items for Stephen

- Admin login credentials
- Client setup instructions
- CPM update guide
- Troubleshooting guide
- Error log walkthrough