



PLAYBOOK

Teamwork Client List Setup

Project Management Insights

Updated Jan. 2026

 **JAIRUS**

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CLIENT INSIGHTS

The Client tab in Teamwork offers key information related to our clients, including which team members are assigned to each client, the client's health status, retainer fee amount and monthly allotted hours.



The Clients tab is located within the left-side menu of Teamwork

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Home / Clients

Clients

Client name #1

Client Status

Client Health

AD

AM(s)

AC

Primary Copywriter

Primary Designer

Monthly Retainer Fee

Est. Monthly Hours

Client SOW Type

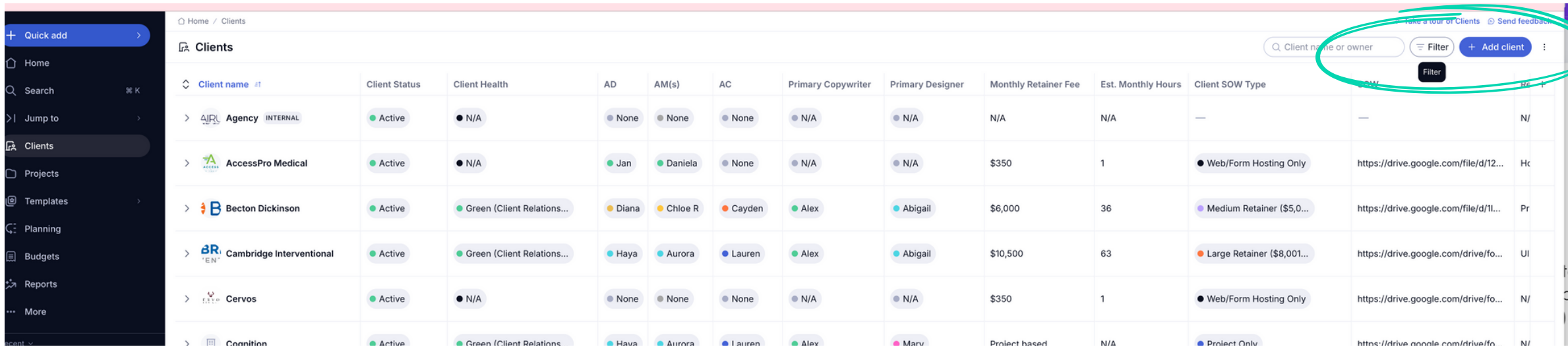
>	Agency INTERNAL	Active	N/A	None	None	None	N/A	N/A	N/A	N/A	—
>	AccessPro Medical	Active	N/A	Jan	Daniela	None	N/A	N/A	\$350	1	Web/Form Hosting Only
>	Becton Dickinson	Active	Green (Client Relations...)	Diana	Chloe R	Cayden	Alex	Abigail	\$6,000	36	Medium Retainer (\$5,0...
>	Cambridge Interventional	Active	Green (Client Relations...)	Haya	Aurora	Lauren	Alex	Abigail	\$10,500	63	Large Retainer (\$8,001...
>	Cervos	Active	N/A	None	None	None	N/A	N/A	\$350	1	Web/Form Hosting Only
>	Cognition	Active	Green (Client Relations...)	Haya	Aurora	Lauren	Alex	Mary	Project based	N/A	Project Only
>	Consova	Active	N/A	Jan	Daniela	Santiago	Alex	Abigail	\$0	N/A	Project Only
>	CSPRx	Active	Red (Client Relationshi...)	Ara	Lailani	Diana	Alex	Mary	\$9,650	58	Large Retainer (\$8,001...
>	Embolx	Active	Green (Client Relations...)	Laura	None	None	Alex	Abigail	Project based	N/A	Project Only
>	Fresenius Kabi (Ivenix)	Active	Yellow (Client Relation...)	Diana	Daria	Cayden	Alex	Mary	Project based	N/A	Project Only
>	Golden Heart Dental	Active	Green (Client Relations...)	Jessica	None	Santiago	Alisa	Mary	\$2,000	12	Extra-Small Retainer (...)
>	Growth	Active	N/A	None	None	None	N/A	N/A	N/A	N/A	Project Only

You'll need to set up your Client tab in Teamwork to reflect the following columns of information:

#1	#2	#3	#4-6	#7	#8	#9	#10	#11
Client Name	Client Status	Client Health	AD, AM(s), AC	Primary Copywriter	Primary Designer	Monthly Retainer Fee	Est. Monthly Hours	Client SOW Type
This column is auto-set and cannot be changed.	Differentiates Active vs. Inactive clients. You can filter your list to only Active clients.	Insight into the current status of the client relationship.	These columns list the assigned AD, AM and AC for each client.	The assigned copywriter for each client.	The assigned designer for each client.	Ongoing fee paid to agency.	Hours allotted for retainer clients each month.	Type of Scope of Work client has with Jairus.
#12	#13	#14	#15	#16				
SOW	Retainer Services	CRM System	Web Platform	Email Platform				
Link to active Scopes of Work.	Quick overview of services included in client SOW.	The CRM utilized by the client.	The wesite CMS used by the client.	The email platform(s) used by the client.				

FILTERING YOUR CLIENT TAB

You can filter your Client tab to reflect only clients you work on:



The screenshot shows the 'Clients' tab interface. A red circle highlights the 'Filter' button in the top right corner, next to a search bar and an 'Add client' button. Below the table, there is a 'Choose filters:' section with four filter options: 'Owner', 'Client', 'Health', and 'Tags'. The 'Owner' filter is selected and circled in red. Below these filters, there is a checkbox for 'Only show clients with active projects' and a 'Save filter' button, which is also circled in red.

Client name	Client Status	Client Health	AD	AM(s)	AC	Primary Copywriter	Primary Designer	Monthly Retainer Fee	Est. Monthly Hours	Client SOW Type	Link
Agency INTERNAL	Active	N/A	None	None	None	N/A	N/A	N/A	N/A	—	N/A
AccessPro Medical	Active	N/A	Jan	Daniela	None	N/A	N/A	\$350	1	Web/Form Hosting Only	https://drive.google.com/file/d/12...
Becton Dickinson	Active	Green (Client Relations...)	Diana	Chloe R	Cayden	Alex	Abigail	\$6,000	36	Medium Retainer (\$5,0...	https://drive.google.com/file/d/1l...
Cambridge Interventional	Active	Green (Client Relations...)	Haya	Aurora	Lauren	Alex	Abigail	\$10,500	63	Large Retainer (\$8,001...	https://drive.google.com/drive/fo...
Cervos	Active	N/A	None	None	None	N/A	N/A	\$350	1	Web/Form Hosting Only	https://drive.google.com/drive/fo...
Connition	Active	Green (Client Relations...)	Haya	Aurora	Lauren	Alex	Marv	Project based	N/A	Project Only	https://drive.google.com/drive/fo...

STEP 1: Click the Filter button in the upper right-hand corner of the Clients tab screen.

STEP 2: You can filter by owner (AD), if you're on the account team, or by clients that you're assigned to if you're on the support team.

STEP 3: Be sure to save your filter for future access.

KEEP YOUR CLIENT INFO ACCURATE

If something changes with your client, such as the Scope of Work, retainer fee or assigned team members, work with the Project Manager to update the corresponding information in Teamwork.

