Clients Dashboard

Your central command center for managing clients, projects, revenue, and team activity — everything you need to run your business at a glance.

Key Features

- **KPI Stats Bar**: Live counts for total accounts, active clients, prospects, active projects, pipeline value, and total revenue collected.
- **Active Projects Timeline**: Visual timeline and list of up to 20 in-progress projects showing status, priority, client name, and key dates. Click any project to open its full detail view.

- **Revenue Trend Chart**: Bar chart of collected revenue over the past 6 months, with a badge showing how this month compares to last month.
- **Annual Revenue Chart**: Full-year revenue summary showing monthly totals for the current year at a glance.
- **Pipeline Funnel**: Breakdown of open projects by stage — Proposed, Contracted, Planning, In Production, On Hold — with project counts and estimated values per stage.
- **Today's Appointments**: All appointments scheduled for today, shown with time and linked client.
- **Quote Win Rate (90 days)**: Track how many quotes were sent, accepted, and declined over the last 90 days, along with total accepted value.
- **This Week's Activity**: Summary of calls made, emails sent, meetings held, and tasks completed since Monday.
- **Upcoming Events**: Project events and milestones due in the next 14 days, sorted by date. Links to the full Calendar view.
- **Recent Activity Feed**: A live log of the latest 15 actions across all your accounts and projects — notes, calls, emails, status changes, and more.
- **Overdue Invoices**: An alert panel (shown only when needed) listing past-due invoices with the client name, amount, and due date.
- **Tasks & Follow-ups**: All pending tasks, follow-up reminders, scheduled calls, and meetings that still need attention.
- **Budget Status**: For projects with set budgets or revenue targets, see at a glance whether spending and income are on track, under, or over for the current month.
- **Expiring Contracts**: Active contracts expiring within 30 days, so you can renew or follow up in time.
- **Recently Active Accounts**: The 5 accounts with the most recent activity, for quick access.

How to Use

1. Open the Clients Dashboard from the main menu.
2. Review your KPI stats at the top — they update every time the page loads.
3. Scroll down to check your active projects and pipeline. Click any project row to see full details.
4. Check the **Overdue Invoices** panel if it appears — these need immediate attention.
5. Review **Tasks & Follow-ups** to see what actions are due.
6. Use the top-right buttons to jump directly to Accounts, Projects, Pipeline board, or Reports.

Importing Contacts

Click the **Import** button at the top right to bring contacts into the system from a CSV file.

1. Upload your CSV file.
2. Map each column to the correct contact field (name, email, phone, company, etc.).
3. Optionally enable **Update existing contacts** to avoid duplicates (matched by email).
4. Add tags to all imported contacts if needed.
5. Click **Import** to complete the process.

Tips

- The **Overdue Invoices** and **Expiring Contracts** panels only appear when there is something to show — a clean dashboard means you're up to date.
- Click **Pipeline** in the top bar to see your project pipeline as a drag-and-drop Kanban board.
- Click **Reports** for detailed revenue and performance breakdowns over custom date ranges.
- Click **Calendar** in the Upcoming Events panel to see all scheduled project events in a full calendar view.