Clients

Your CRM home base — an at-a-glance view of every account, project, deal, and task across your business.

Key Features

- **KPI Summary Bar**: Six live counters at the top — Total Accounts, Active Clients, Prospects, Active Projects, Pipeline Value, and Total Revenue — so you always know where you stand.
- **Active Projects Timeline**: A visual Gantt-style chart showing all in-progress projects across

their date ranges. Click any project bar to jump straight to the project detail.

- **Revenue Trend**: A 6-month bar chart of collected payments with a badge showing how this month compares to last month (e.g. +12% vs last month).
- **Pipeline Funnel**: A breakdown of your active deals by stage — Lead, Proposal, Contracted, In Progress, On Hold — with project counts and estimated values per stage.
- **Today's Appointments**: All appointments scheduled for today, listed by time.
- **Quote Win Rate**: A 90-day scorecard showing how many quotes were accepted, declined, or are still pending, plus your overall win percentage.
- **This Week's Activity**: A running count of calls made, emails sent, meetings held, and tasks completed since Monday.
- **Upcoming Events**: Project-linked events happening in the next 14 days, with dates and venue info.
- **Recent Activity Feed**: A live stream of the last 15 actions across all accounts — calls, emails, notes, payments, status changes, and more.
- **Overdue Invoices**: An alert card (shown only when needed) listing past-due invoices with days overdue and total amount outstanding.
- **Tasks & Follow-ups**: Your pending calls, follow-ups, meetings, and tasks. Click the icon on any task to mark it complete without leaving the dashboard.
- **Budget Status**: For projects with monthly budgets or revenue targets, a progress bar shows whether you're under, on track, or over for the current month.
- **Expiring Contracts**: Contracts reaching their end date within 30 days appear here as a heads-up (hidden when none are expiring soon).
- **Recently Active Accounts**: The five accounts with the most recent activity, with type badge (client, prospect, lead) and total revenue.
- **Import Contacts**: Upload a CSV file to bulk-import contacts. Preview and map your columns before importing, with an option to update existing records matched by email address.

How to Use

1. Open **Clients** from the sidebar to see your full dashboard.
2. Check the **KPI bar** at the top for a quick health check of your accounts and pipeline.
3. Review the **Timeline** to see which projects are active and where they fall in the calendar.
4. Use the **Pipeline Funnel** to spot where deals are concentrated and click **View Board** to manage them.
5. Check **Tasks & Follow-ups** and click the task icon to complete items directly from the dashboard.
6. If the **Overdue Invoices** card appears, address those accounts promptly.

7. To add contacts in bulk, click **Import** in the top-right, upload your CSV, map the columns, and confirm.

Tips

- The dashboard updates automatically when you switch sites using the site selector in the top bar.
- Tasks completed here are reflected immediately across the CRM — no need to visit the activities page.
- Use the **Pipeline** and **Reports** buttons in the top-right to dive deeper into deal management and analytics.
- The Revenue Trend badge turns red when this month's revenue is below last month — a quick signal to focus on collections.
- Contracts expiring within 7 days show in red; 8–30 days show in amber.