

Main Dashboard Design Overview

1. Main Dashboard

- A summary of key metrics and updates, such as:
 - Total clients and active clients.
 - Pending tasks (e.g., VAT returns, financial reports).
 - Upcoming deadlines.
 - Notifications or alerts (e.g., overdue tasks, client messages).

2. Client Management

- Add/View/Edit/Delete client details.
- Search and filter clients by name, industry, VAT status, etc.
- Client profiles showing:
 - Contact details.
 - VAT details (e.g., VAT registration number, filing frequency).
 - Financial history or documents (uploaded files).

3. Reports

- Generate VAT and accounting reports for clients.
- Export reports in formats like PDF, Excel, or CSV.
- Filter reports by client, date range, or category (e.g., VAT, payroll, P&L).

4. Notifications

- Automated reminders for:
 - VAT deadlines (Quarterly filing).
 - Client follow-ups.
- Email/SMS/Push notifications to team members and clients.

5. User Roles

- **Admin Role:** Full access to manage clients, tasks, reports, and users.
- **Accountant Role:** Access to assigned clients, tasks, and reports.

- **Client Role:** Limited access to their own information and reports.

6. Other Features

- **Document Management:** Secure upload and storage for client-related files.
- **Analytics:** Graphs or charts showing trends (e.g., filing compliance rate, client revenue distribution).
- **Integration:** Connect with accounting software (e.g., QuickBooks, Xero) or tax portals.