**AdiTeke – Client Tab: Final Design & Feature Breakdown**

**1. Client Dashboard Overview (Main List View)**

* **Table/Grid Layout** with the following columns:
  + Client Name & Logo
  + Email / Contact
  + Assigned Manager
  + Status (Active, Inactive, VIP)
  + **of Projects**
  + Total Billed ($)
  + Last Invoice Date
  + Action buttons: View

**Extras:**

* Search, filter, and sort
* Tabs at top: All | Active | VIP | Prospects | Archived

**2. Individual Client Profile View**

Tabbed layout with 5 major sections:

**A. Overview Tab**

* Client basic info
* Project Summary Cards
* Activity Feed
* Notes section
* Tags/Labels (VIP, High Priority)

**B. Projects Tab**

* List of linked projects
* Status: On Hold, In Progress, Completed
* Progress bars + deadlines
* Quick button: Create New Project(you already implement on project tab we can use projectForm.)

**C. Pricing & Billing Tab**

**1. Payment Structure Section**

When creating an invoice or a project:

* Select Payment Plan:
  + **Fixed Full Payment**
  + **40% Upfront + Remaining on Completion**
  + **Custom Milestones (Optional future upgrade)**

If **"40% Upfront"** is selected:

* Auto-calculate 40% of the total project price
* Allow user to **override and pay more (e.g. 60%, 100%)**
* Save the balance (remaining amount) as **Pending Payment**

**2. Billing Timeline UI**

Show a visual timeline or table like:

| **Payment Phase** | **Amount** | **Status** | **Due Date** |
| --- | --- | --- | --- |
| Initial (40%) | $2,000 | **Paid** | Apr 15 |
| Remaining (60%) | $3,000 | **Pending** | May 10 |

* Each phase shows: status badge, due date, and payment button if pending
* Can be marked as “Paid” by admin or auto-tracked if integrated with Stripe/PayPal

**3. Receipt System Enhancements**

* Send separate receipts for:
  + **Initial Payment** (40% receipt)
  + **Final Payment** (remaining amount)
* Show status: "Partially Paid", "Fully Paid", "Overdue"

This creates trust and professional transparency for clients

**4. Notifications / Automation**

* Automatically send:
  + Receipt when initial payment is confirmed
  + Reminder email when final payment is due
* Use **Firebase Cloud Functions** for automation (free-tier friendly)

**5. Manager View Controls**

Managers can:

* View payment breakdown per client/project
* Edit payment terms (e.g. change to 50/50 split if needed)
* Resend payment links or download receipts
* Add manual payment confirmation (if payment was offline)

**Pricing Section:**

* Assign packages or create custom pricing
* Save client-specific rates

**Invoice Generator:**

* Add services/hours
* Tax, discounts, currency
* Preview as PDF

**Billing History:**

* Table of previous invoices
* Status (Paid, Due, Overdue)
* Download Receipt (PDF)
* Send to Client (via email or link)

**D. Files & Docs**

* Upload/download contracts, reports, feedback
* Show thumbnails for PDFs, Word, images
* Tag files by category