ClientIQ – Quick Start & Troubleshooting Guide

Simplifying Analytics, Amplifying Success

1. Welcome to ClientIQ

Thank you for purchasing **ClientIQ – Client Profitability Dashboard**.
This app helps you:

- Track revenue, profit, and client performance
- Identify your most profitable clients and projects
- Manage invoices and accounts receivable with ease
- Customize thresholds, currency, and themes to fit your workflow

2. Getting Started

1. **Login/Register**
   - Use the demo account option or create your own account.
2. **Navigation Overview**
   - **Dashboard:** Overall KPIs and trends
   - **Clients:** Profitability analysis by client
   - **Invoices & AR:** Track payments and overdue invoices
   - **Settings:** Customize themes, thresholds, and preferences
3. **Sample Data**
   - The app comes with **pre-loaded demo data** so you can explore features immediately.
4. **Clearing Demo Data (Important!)**
   - Before adding your own information, delete the demo entries:
     - Go to **Clients Page** → delete demo clients
     - Go to **Invoices & AR Page** → delete demo invoices
     - Go to **Client Drillthrough Page** → delete demo projects
   - Once cleared, you can start adding/importing your real data.

3. Adding Your Own Data

Clients

- Use the **Add Client** button to manually enter details.
- Or **Import CSV** for multiple clients at once.

Invoices

- Add individual invoices using the **Add Invoice** form.
- Import multiple invoices via the **CSV Import Wizard**.

Projects

- Add projects under a client to analyze project-level profitability.
- Use the **Add Project** form (Project Name, Hours, Revenue, Profit).

4. Understanding the Dashboard

- **KPIs:**
    - *Total Revenue, Gross Profit, Gross Margin %, Outstanding AR, Days Sales Outstanding, Billable Hours*
- **Charts:**
    - Revenue & Profit trends
    - Top 10 clients by revenue
    - AR Aging chart for overdue invoices
- **Color-coded Alerts:**
    - Green = healthy
    - Amber = warning
    - Red = critical (e.g., overdue invoices)

5. Customizing Settings

- Adjust **Margin Thresholds** (High/Medium/Low colors).
- Choose **Overhead Allocation** (fixed value or %).
- Set **Currency & Locale** to match your region.
- Switch between **Gradient Themes** (Blue, Green, Purple, Teal).
- Toggle **Dark Mode** for a dark background with the same theme accents.

6. Troubleshooting

Problem: Login not working
Solution: Ensure you've registered, or try the demo account.

Problem: CSV won't import
Solution: Make sure columns are named correctly (see sample CSV provided).

Problem: Charts not updating
Solution: Refresh the page; confirm data was added correctly.

Problem: Overdue alerts not showing
Solution: Check invoice due dates and payment status.

7. Need Help?

If you face issues beyond this guide, please reach out via your Gumroad purchase confirmation email.

✨ That's it! You're ready to use **ClientIQ** to take smarter, data-driven decisions about your clients and projects.