



Dashboard

Leads

Clients

Tasks

Analytics

Settings

Total Leads

1,284

+ 12% from last month

Active Client

86

+ 5 new this week

Revenue

\$42,580

+ 18% growth

Pending Tasks

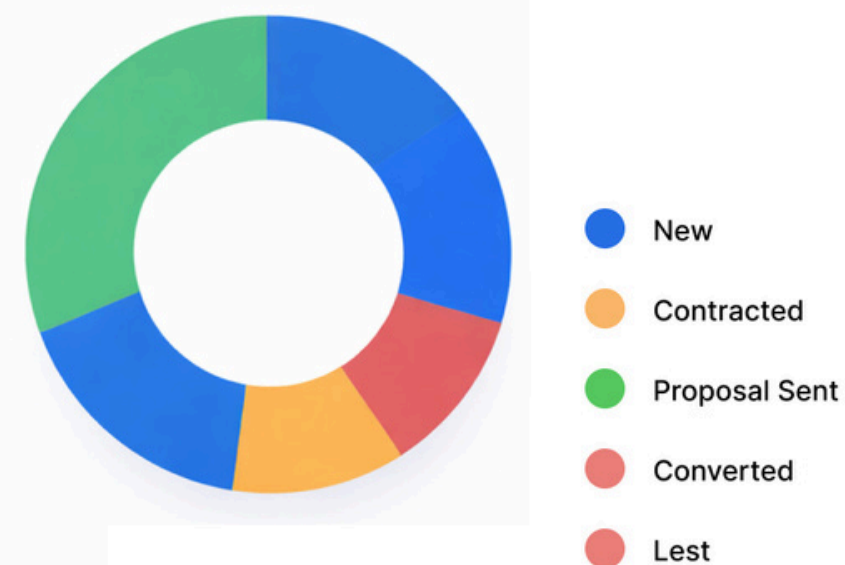
23

5 Overdue

Monthly Lead Conversions



converted Leads



Recent Activity

- Samantha Lee moved to Proposal stage 2h ago
- \$ 5,000 deal marked as Won Yesterday
- Follow-up task-created for TechNova Yesterday
- Client "BrightMedia" saided 2 days ago

Upcoming Tasks


- Call Samantha Lee Today 3:00 PM
- Send proposal to TechNova Tomorrow
- Follow-up with ApexSolutions Friday
- Review contract 20 March

Leads




Filter




Soft




Filter




New Lead

New Lead (12)



Contracted (9)



Proposal Sent (6)



Converted (14)



Tyler Bennett
Harizon Fitness



\$ 3,000

\$ 3,600

Michelle Ward
Apex Solutions



Warm

\$ 5,300

Samantha Lee
Macie Fstivie



\$ 18,550

\$ 18,900

Phoenix Web Works
Aearthelue



\$ 10,500

\$ 10,500

Sarah Fowler
BrightMedia



Hot

\$ 5,300

David Clarkson
TechNova



Hot

\$ 5,300

Laura Spencer
Horizon Marketing



Hot

\$ 7,400

NextGen Systems
Tour Hoea



Converted

\$ 6,900

John Carter
Carter Enterprises



Cold

\$ 2,200

Madison Hill
Gooythhy



Lost

\$ 9,800

Clients












Filter

Expert

+ Filter

+ Add Client

Client Name	Company	Email	Phone	Status	Assigned Manager	Time
 Samantha Phone	BrighWave Solutions Honaeon	samantha@wave.com	(123) 456-7890	Warm	Daniel w.	Today
 Tyler Bennett	Innovate Tech Ashok Softech	tyler@innovate.com	(100) 522-8100	Active	Lisa K.	Yesterday
 Michelle Ward	Apex Solutions Taus Branch	michell@apex.com	(190) 466-7800	Cold	Jason T.	Yesterday
 David Clarkson	TechNova Hechy More	david@technova.com	(120) 366-7990	Hot	Rachel P.	2 days ago
 Laura Spencer	Horizon Marketing Kioh Horizon	lauratyler@horizoncom	(103) 236-7600	Warm	Emily B.	2 days age
 John Carter	Carter Enterprises Sor Chhcoth	john@carteribe.com	(103) 229-6900	Cold	Mark T.	3 days ago
 Sarah Fooner	Bright Media Sorizon Mave	sarah@brighmedia.com	(160) 299-5000	Hot	Julla M.	3 days ago
 Bpandom Hancla	Phoenic Web Works Reach Sech	brandon@phoenic.com	(105) 769-4300	Warm	Kovin S.	a week ago
 Danielle Show	Growthly jo Latshhlp	danielle@growthly.in	(100) 295-7700	Warm	Michad C.	a week ago

Task



All Today (2) Upcoming (2) Overdue (1) Completed (3)

+ Add Task

Today

- | | | |
|--|-----------------|--------|
| <input type="checkbox"/> Call Samantha Lee
Apex Solutions | Today @ 3:00 PM | High |
| <input type="checkbox"/> Review Contract
BrightWave | Today @ 5:00 PM | Medium |

Upcoming

- | | | |
|--|----------|--------|
| <input type="checkbox"/> Send proposal to TechNova | Tomorrow | Medium |
| <input type="checkbox"/> Follow-up with Apex Solutions | 2 days | Low |

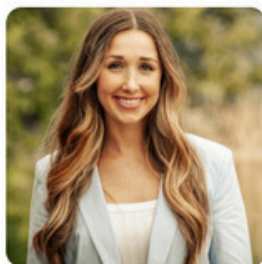
Overdue

- | | | |
|--|----------------|--------|
| <input type="checkbox"/> Prepare invoice for BrightMedia | 2 days overdue | Medium |
|--|----------------|--------|

Completed

- | | | |
|--|-------|-----------|
| <input type="checkbox"/> Review campaign performance | Today | Completed |
|--|-------|-----------|

Client Profile



Samantha Hayes

Marketing Manager

BrightWave Solution

Warm

samantha.hayes@brightwave.com

(123) 456-7900



San Francisco, CA



Call



Send Email



Schedule Meeting

Deal Overview

2

Active Deals

\$185,500

Total Revenue

3

Open Tasks

Activity Timeline



2 hours ago

Proposal Updated

Samantha Hayes proposal updated.



Yesterday

Call completed

Call completed with Samantha Hayes.



2 days ago

Contract shared

Shared contact with Samantha Hayes.



2 days ago

Initial meeting

Initial meeting mail with Samantha Hayes

Recent Notes

- Interested in SEO + Paid Ads
- Budget Approved
- Proposal Reviewed

