

DASHBOARD DEVELOPMENT GUIDE

Goal: Build a world-class, real-time, user-friendly sales & marketing dashboard

CORE OBJECTIVE

Purpose: To visually monitor, analyze, and report on sales & marketing automation impact.

Focus: Lead performance, campaign ROI, team effectiveness, and real-time engagement.

STACK RECOMMENDATION

Component	Technology
Frontend	React + Tailwind CSS + Recharts (or Victory)
UI Framework	Shadcn UI or Material UI (shadcn preferred for elegance)
Backend (optional)	Supabase or Firebase (real-time sync, easy auth)
Data Source	Google Sheets (connected via Supabase sync or Sheets API)
Deployment	Vercel / Netlify
Realtime Feeds	Webhooks from n8n + Sheet updates from automations
Auth (Optional)	Google Sign-In / Role-based access (Admin, Sales, Exec)

Top Navigation

- Logo
- Navigation tabs:
 - Overview
 - Leads & Conversions
 - Campaign Insights
 - Agent Performance
 - WhatsApp Activity
 - Social Media Summary
 - Recommendations
- Date Range Picker
- Export PDF Button

1. Overview Page

- High-level performance indicators across the entire funnel

Widgets:

Total Revenue from Closed Deals (Today/Week/Month)

Leads Captured (Today, Weekly trendline)

Hot Leads Engaged

Conversion Rate %

Average Time to Close

Campaign ROI Heatmap

Pending Follow-ups

2. Leads & Conversion Page

- Tracks everything from lead capture to deal closure
- Charts/Components:
- Lead Source Pie Chart (WhatsApp, Social, Website, Referral)
- Lead Funnel Progression (Bar/Flowchart)
- Captured → Engaged → Site Visit → Proposal Sent → Closed
- Time-to-Conversion Line Chart
- Drop-off Triggers: Highlight where leads die (auto-flagged)
- Leads by Region Heatmap (optional)

3. Campaign Insights Page

- Visualize ad performance, content effectiveness & audience behavior
- Widgets:
- Cost per Lead by Campaign
- Campaign Performance Table:
- Campaign Name, Impressions, Clicks, CTR, Cost/Lead, ROI
- Audience Profile Breakdown:
- Age, Gender, Location, Device
- Top Performing Content Feed
- Low Performing Content Warning
- Virality Index Tracker (from Relevance scoring)

4.Agent/Team Performance Page

- Tracks individual and team efficiency
- Widgets:
 - Agent Leaderboard
 - Leads handled
 - Deals closed
 - Response speed
 - Avg Response Time per Agent
 - Abandoned or Dormant Leads per Agent
 - Daily/Weekly Workload

5.WhatsApp & Follow-Up Activity

Monitor AI engagement through WhatsApp and emails

Widgets:

- WhatsApp Response Time Gauge
- Follow-Up Activity Graph
 - Auto-followups vs Manual
- Conversations Open vs Closed
- AI-Generated Replies (Review Section)
- Lead Response Logs (Expandable Cards)

6.Social Media Performance

Track organic social efforts beyond paid ads

Widgets:

- Posting Activity (Calendar View)
- Engagement Chart: Likes, Comments, Saves
- Listening Agent Output: Leads from DMs/comments
- Top Performing Organic Posts
- Content Recommendations from Relevance AI

7.Weekly Insights & Suggestions

Summarized AI advice for better decisions

Widgets:

- Content to Post More
- Audiences to Target
- Drop-Off Triggers Detected
- Performance Summary Download (PDF)

UI DESIGN PRINCIPLES

Principle	Guideline
Consistency	Use consistent spacing, font sizes, colors, and icon sets
Data Density	Prioritize clarity over clutter – group related metrics
Responsiveness	Mobile-first design; dashboard must adapt to all screens
Animations	Use subtle transitions (e.g., chart loading, number counters)
Filters	Add smart filters: Date, Source, Campaign, Agent, Region
Tooltips & Legends	Every graph should have contextual explanation
Dark Mode	Optional toggle for viewing at night (developer choice)

USER ROLES (Optional)

Role	Permissions
Admin	Full access + manual data override
Sales Manager	View team performance + assign leads
Marketing	View campaigns and post analytics
Executive	View high-level summaries only