

System Refinements — Walkthrough

Date: February 8, 2026

What Was Built

1. Master Index

- [index.md](#) at the root of Setup Concierge
- Maps every folder with descriptions and links
- Includes quick reference for workflows and conventions

2. /new-client Workflow

- Scaffolds a full client folder (Sessions, Website & Strategy, Media, Action Items, Meeting Notes)
- Includes steps to update Master Index and Dashboard

3. Naming Conventions

- [naming_conventions_2026-02-08.md](#)
- File naming format, folder rules, standard prefixes, document structure

4. Meeting Notes System

- Created Meeting Notes/ folders in Advisory Panel, Black Nexus, and WNQ
- Added [meeting_notes_template.md](#) with attendees, agenda, decisions, action items

5. Financial Tracking

- Created Finances/ with Invoices Sent, Invoices Received, and Expenses subfolders
- Each with standard Markdown/PDF asset structure

6. Version History

- Added Previous Versions/ folders in Consultations, Website & Strategy, and Templates

7. Dashboard

- [dashboard_2026-02-08.md](#)
- Business snapshot, active clients, open action items, revenue tracker, system health