

# System Refinements — Walkthrough

**Date:** February 8, 2026

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## 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 WNZ
- 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