

# PowerLytix Dashboard - Quick Start Guide

---

## Getting Started in 5 Minutes

---

Welcome to your PowerLytix Private KPI Dashboard! This guide will help you get up and running quickly.

---

## Dashboard URL

---

**Live Dashboard:** <https://power-lytix-private-kpi-dashboard-erhxyw3nc-velocity-venture.vercel.app>

---

## Step 1: First Login

---

### Create Your Account

1. Navigate to the dashboard URL above
2. Click "**Sign Up**" (if you don't have an account yet)
3. **Enter your email address** (any valid email)
4. **Create a password** (any password - minimum 6 characters)
5. Click "**Sign Up**" or "**Create Account**"

### Login to Existing Account

1. Enter your **email address**
2. Enter your **password**

### 3. Click "**Sign In**" or "**Login**"

**Note:** The dashboard uses Supabase authentication, so your credentials are secure and encrypted.

## Step 2: Explore the Dashboard

After logging in, you'll see:

### Main Dashboard (Default View)

- **36 KPI cards** organized into 4 categories:
  - **Top-Line Rollup** (5 KPIs)
  - **Marketing** (4 KPIs)
  - **Call Center** (4 KPIs)
  - **Sales** (4 KPIs)
- Each card shows:
  - Current value with animated count-up
  - 7-day sparkline trend
  - Period-over-period comparison (when enabled)

### Key Features to Try

1. **Date Filtering** (top right):
  - Click **7d**, **30d**, or **90d** for quick ranges
  - Click "**Custom Range**" to select specific dates
2. **Compare Mode** (top right):
  - Toggle "**Compare with Previous Period**"
  - See green ↑ or red ↓ arrows with percentage changes

### 3. **Charts Section** (scroll down):

- View trend charts for key metrics
- Hover over data points for details

### 4. **Goals Section** (scroll down):

- 4 goal cards with progress bars
- Track performance against targets

### 5. **Export Options** (top right):

- **Export to PDF:** Download comprehensive report
  - **Export to Excel:** Get raw data in spreadsheet format
- 

## Step 3: Set Up API Keys (Optional)

---

If you need to integrate external data sources:

### Navigate to API Key Management

1. Click your **profile icon** or **menu** (top right)
2. Select "**Admin**" or "**Integrations**"
3. Navigate to `/admin/integrations` page

### Add API Keys

1. Select the **platform** (e.g., Google Ads, Facebook Ads)
2. Enter your **API Key** or **Access Token**
3. Give it a **descriptive name** (e.g., "Main Google Ads Account")
4. Click "**Save**" or "**Add Key**"

### Test Your Integration

- Once saved, the dashboard will start pulling data from that platform

- Refresh the dashboard to see updated metrics

**Note:** API keys are encrypted and stored securely in your Supabase database.

## Step 4: Set Up for Yourself

### Customize Your View

#### 1. Set Your Goals:

- Scroll to the **Goals section**
- Click "**Edit**" or **gear icon** on each goal card
- Enter your target values and timeframes
- Click "**Save**"

#### 2. Configure Alerts:

- Scroll to **Alert Configuration** section (or navigate to Settings)
- Set threshold values for critical KPIs
- Choose which metrics trigger alerts
- Click "**Save Alert Settings**"

#### 3. Adjust Date Range:

- Set your preferred default date range
- The dashboard will remember your last selection

### Personalize Your Experience

- Bookmark the dashboard URL for quick access
- Set up browser notifications (if prompted)
- Explore the charts and data to understand your baseline metrics

## Step 5: Set Up for Each Client

If you're managing multiple clients, here's how to organize:

### Option A: Multiple User Accounts (Recommended for Now)

Since v1 doesn't have multi-tenant architecture yet, create separate setups:

**1. Create a new account** for each client:

- Use client-specific email (e.g., `client1@youragency.com`)
- Set a unique password
- Log in with that account

**2. Configure each client dashboard:**

- Add their API keys in **Admin > Integrations**
- Set their specific goals
- Configure their alert thresholds

**3. Access multiple clients:**

- Log out and log back in with different credentials
- Or use multiple browser profiles (Chrome profiles, Firefox containers)

### Option B: Naming Convention (Temporary Workaround)

Until multi-client features are added:

**1. Use descriptive names** for API keys:

- "Client A - Google Ads"
- "Client B - Facebook Ads"

2. Create **separate goal cards** or track in notes:

- "Client A Sales Goal: \$50K"
- "Client B Sales Goal: \$75K"

## Option C: Request Version 2 Multi-Tenant Features

For proper client separation: - See **Version 2 Roadmap** for multi-tenant architecture - This will provide: - Separate dashboard instances per client - Client-specific branding - Consolidated agency view - Easy client switching

---

## Step 6: Daily Usage Tips

---

### Your Daily Workflow

#### 1. Morning Check-In:

- Log in to dashboard
- Review Top-Line Rollup KPIs
- Check for any red ↓ arrows (declining metrics)
- Look at Goals progress

#### 2. Weekly Review:

- Toggle **Compare Mode** to see week-over-week changes
- Export to PDF for team meetings
- Adjust goals if needed

#### 3. Monthly Analysis:

- Change date range to **30d** or custom month
- Export to Excel for deeper analysis
- Review all 36 KPIs across categories

## Best Practices

- Check dashboard daily for real-time insights
  - Use Compare Mode to spot trends early
  - Set realistic goals and update them quarterly
  - Export reports before client calls
  - Configure alerts for critical metrics (don't miss important changes)
- 

## Common Questions

---

### **Q: I forgot my password. How do I reset it?**

**A:** Click "**Forgot Password**" on the login page and follow the email instructions.

### **Q: Can I give access to my team members?**

**A:** Yes! Have them create their own accounts with their email addresses. They'll see the same dashboard (currently shared data view).

### **Q: How often does the data update?**

**A:** Data refreshes based on your API integration settings. Manual data entry updates in real-time.

### **Q: Can I customize which KPIs are displayed?**

**A:** Currently, all 36 KPIs are shown by default. Custom KPI selection is planned for Version 2.

### **Q: How do I export data?**

**A:** Click the "**Export to PDF**" or "**Export to Excel**" buttons in the top right corner of the dashboard.

## Q: Where are my API keys stored?

**A:** API keys are encrypted and stored securely in your Supabase database. Only you can access them.

## Q: Can I access this on mobile?

**A:** Yes! The dashboard is fully responsive and works on phones and tablets through your web browser.

## Q: How do I add more integrations?

**A:** Navigate to **Admin > Integrations** and add API keys for supported platforms.

---

## Need Help?

---

If you have questions or need assistance:

1. **Review the Full User Guide:** [Link to POWERLYTIXUSERGUIDE.md]
  2. **Watch the Demo Video:** [PowerLytix-Demo-Video.mp4]
  3. **Contact Support:** [Your support email/contact info]
- 

## Next Steps

---

- [ ] Create your account and log in
- [ ] Explore all 36 KPIs and understand what they measure
- [ ] Set up your API keys (if using integrations)
- [ ] Configure your first set of goals
- [ ] Set up alert thresholds
- [ ] Export your first PDF report
- [ ] Set up accounts for each client (if applicable)

- [ ] Review Version 2 Roadmap for upcoming features
- 

**Ready to make data-driven decisions?  
Log in now and start tracking your KPIs!**

**Dashboard URL:** <https://power-lytix-private-kpi-dashboard-erhxyw3nc-velocity-venture.vercel.app>

---

**Document Version:** 1.0

**Last Updated:** January 2024

**Dashboard Version:** 1.0 (Production)