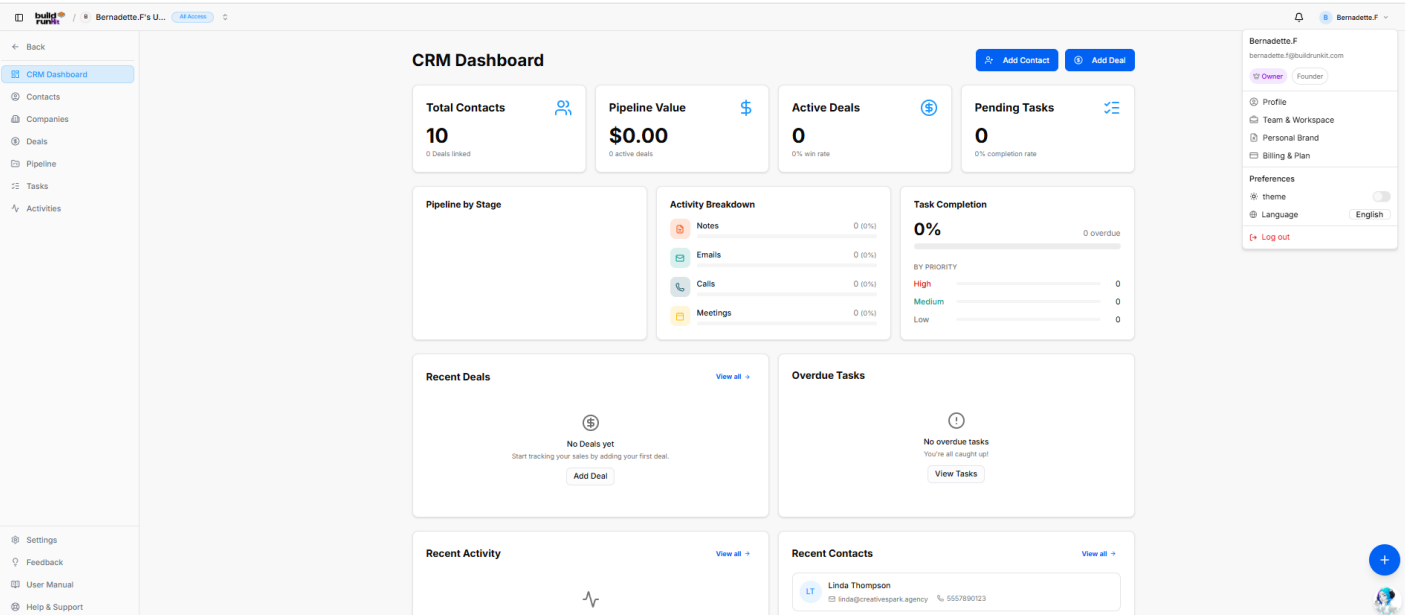


BuildRunKit CRM Dashboard Overview

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The **BuildRunKit CRM Dashboard** provides an high-level view of your sales pipeline, contact metrics, task progression, and recent client activity.

Left Navigation Sidebar

The left navigation panel gives quick access to core CRM modules and user preferences:

- **CRM Dashboard:** The main metrics and activity hub.
- **Contacts:** Manage individual client and lead records.
- **Companies:** Manage parent organization profiles and associated contact groups.
- **Deals:** Track sales opportunities and revenue targets.
- **Pipeline:** Visual pipeline stage manager.
- **Tasks:** Track and manage assigned client action items.
- **Activities:** Log and review communications (notes, emails, calls, meetings).

- **System Utilities (Bottom Bar):** Quick links for Settings, Feedback, User Manual, and Help & Support.

Header & Quick Action Controls

Located at the top right of the screen layout:

- **Workspace Context Switcher:** Displays the currently active workspace name and access permissions in the top left header bar.
- **Notification Bell:** Clickable bell icon located in the top right utility area to view real-time system alerts, task assignments, and activity updates.
- **User Profile Menu:** Displays active account details, role status, and quick preferences (theme toggle, language selection, and log out options).
- **Add Contact:** Direct action button to open the contact creation modal.
- **Add Deal:** Direct action button to launch the new deal configuration window.

Key Performance Indicator (KPI) Summary Cards

The top metrics bar displays primary performance statistics:

- **Total Contacts:** Shows total active contacts and linked deal count (e.g., 10 Contacts).
- **Pipeline Value:** Tracks the cumulative monetary value of active deals in the sales pipeline.
- **Active Deals:** Displays open deal count and win-rate percentage.
- **Pending Tasks:** Tracks total open task volume and task completion percentage.

Middle Analytics & Tracking Panels

- **Pipeline by Stage:** Visual breakdown showing deal distribution across active pipeline stages.
- **Activity Breakdown:** Tracks logging percentages for Notes, Emails, Calls, and Meetings.
- **Task Completion:** Displays overall completion percentage alongside priority breakdown levels (High, Medium, Low) and overdue task counters.

Bottom Monitoring Grid

- **Recent Deals:** Lists recently created deals with quick action to add new records.

- **Overdue Tasks:** Highlights urgent action items requiring immediate attention with direct link to view all tasks.
- **Recent Activity:** Logs sequential updates across contacts, deals, and communication streams.
- **Recent Contacts:** Displays recently added contacts with direct contact details (e.g., Linda Thompson).

Floating Action Utility & Assistant

- **Quick Shortcuts Plus Button (+):** Located at the bottom-right corner directly above the chatbot, providing instant floating shortcuts to create records across:
 - **CRM**
 - **Projects**
 - **Strategy Hub**
- **BuildRunKit Chatbot Assistant:** Floating AI assistant launcher positioned directly in the bottom-right corner.

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