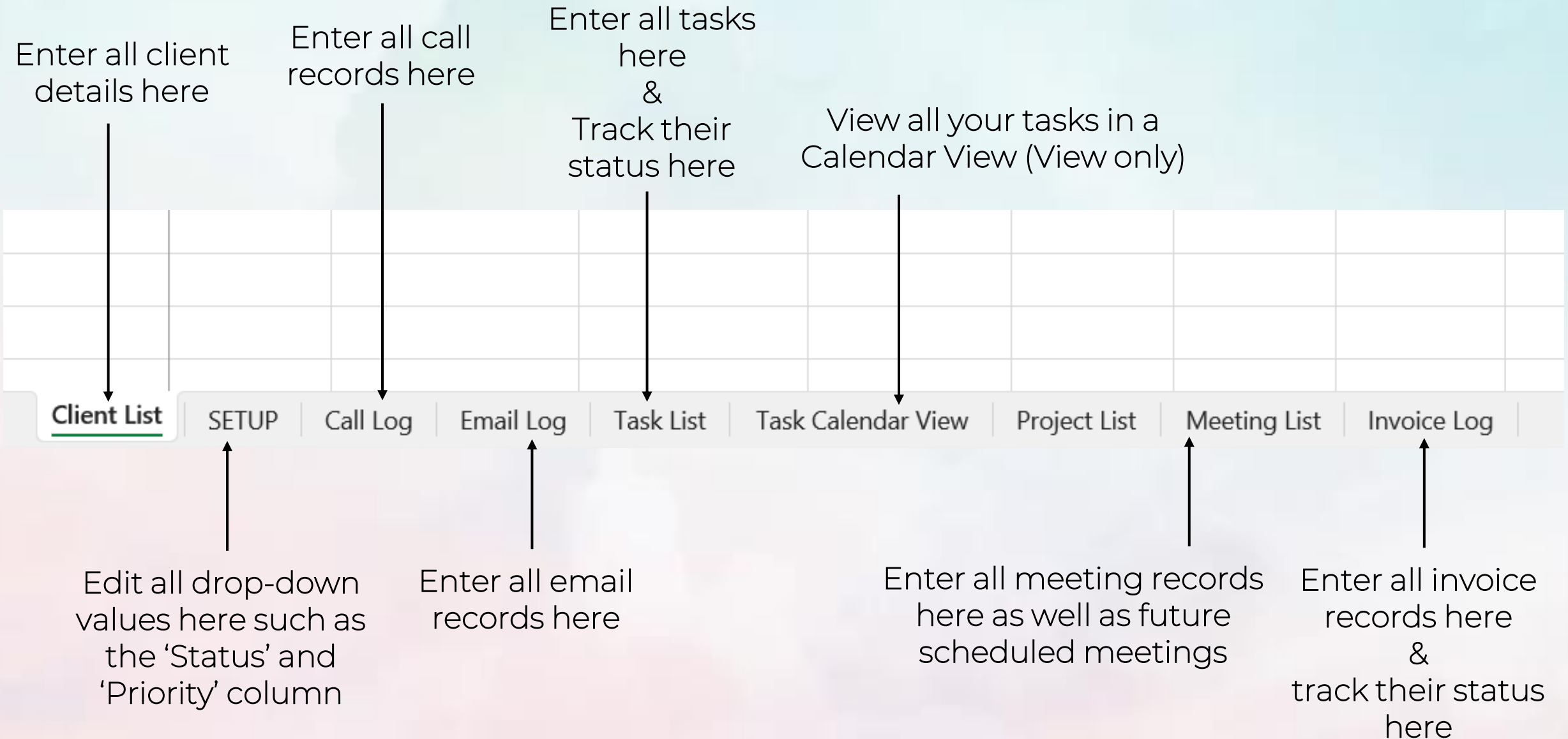


Excel Client Tracker with Dashboard

Instructions

Introductions To All Tabs



SETUP Tab

Step 1: **Click** on the 'SETUP' tab

	F	G	H	I	J	K	L	M	N	O
	Client List Tab Labels									
2	Edit or add new labels here									
3	Client Types	Client Source	Client Priority	Client Status	Do not change the placement of the first 2 labels		Task / Meeting Priority	Do not change the placement of the first 2 labels		Task Status
4	Enterprise	Phone Outreach	High	Won	Label for Won Closed		High	Label for Completed		Completed
5	Small Business	Website	Medium	Lost	Label for Lost Closed		Medium	Label for Cancelled		Cancelled
6	Law Firm	Email Campaign	Low	Status 1			Low			Not Started
7	Startup	Advertisement		Status 2						In Progress
8	Healthcare	Networking		Status 3						Deferred
9		Social Media		Status 4						On Hold
10		Referral								
11		LinkedIn								
12		Word of Mouth								
13										
14										
15										
16										
17										
18										
19										
20										
21										
22										
23										
24										

<

>

Client List

SETUP

Call Log

Email Log

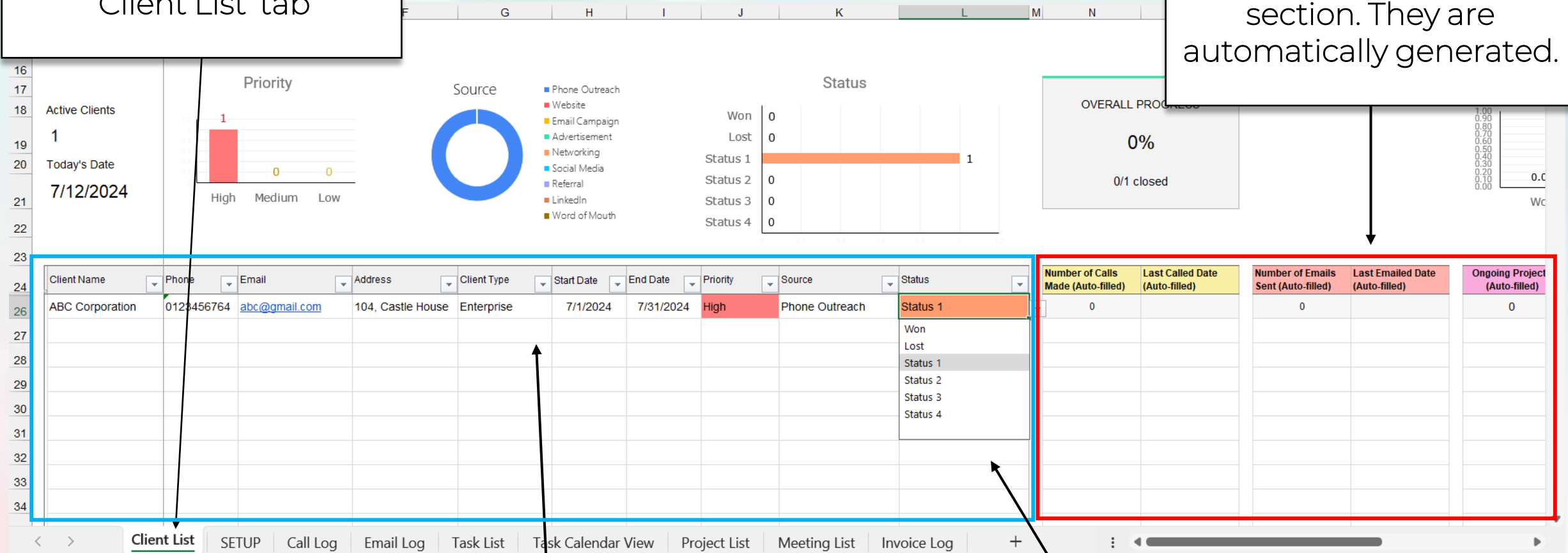
T

Step 2: **Edit / add** custom labels here. They are connected to the drop-down list in the 'Client List' tab

Client List Tab

Step 3: **Click** on the 'Client List' tab

Note: **Do not** edit this section. They are automatically generated.

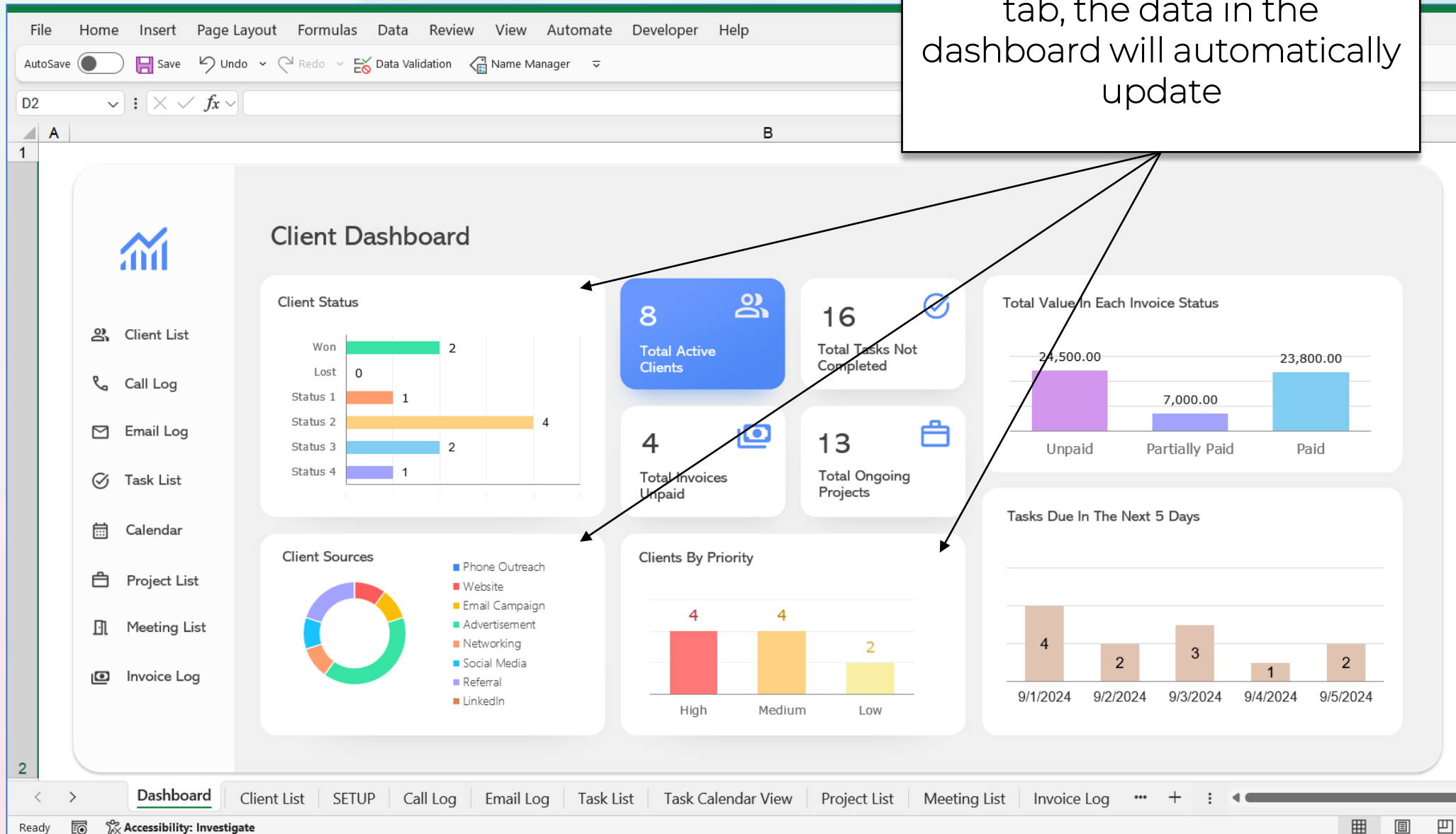


Step 4: **Enter** your client's details here

Step 5: **Record & track** your client's status in this column

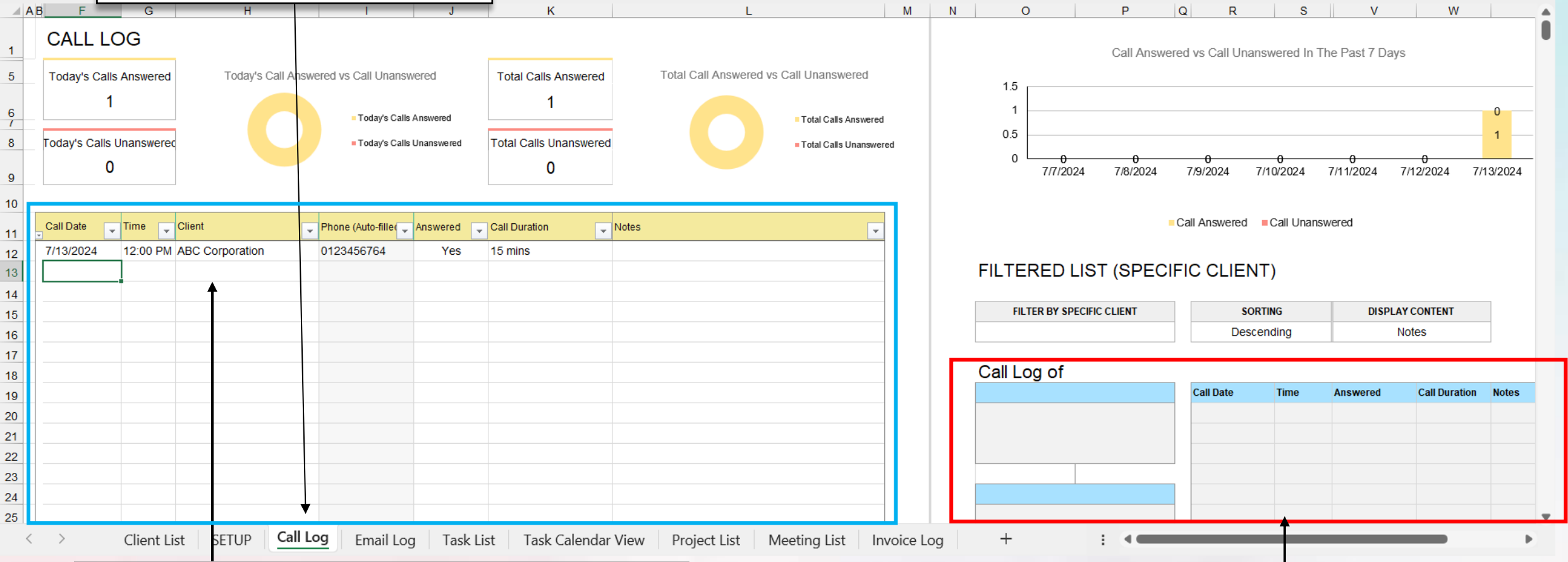
Dashboard Tab

As you fill in your **'Client List'** tab, the data in the dashboard will automatically update



Email Log Tab

Step 6: **Click** on the 'Call Log' tab



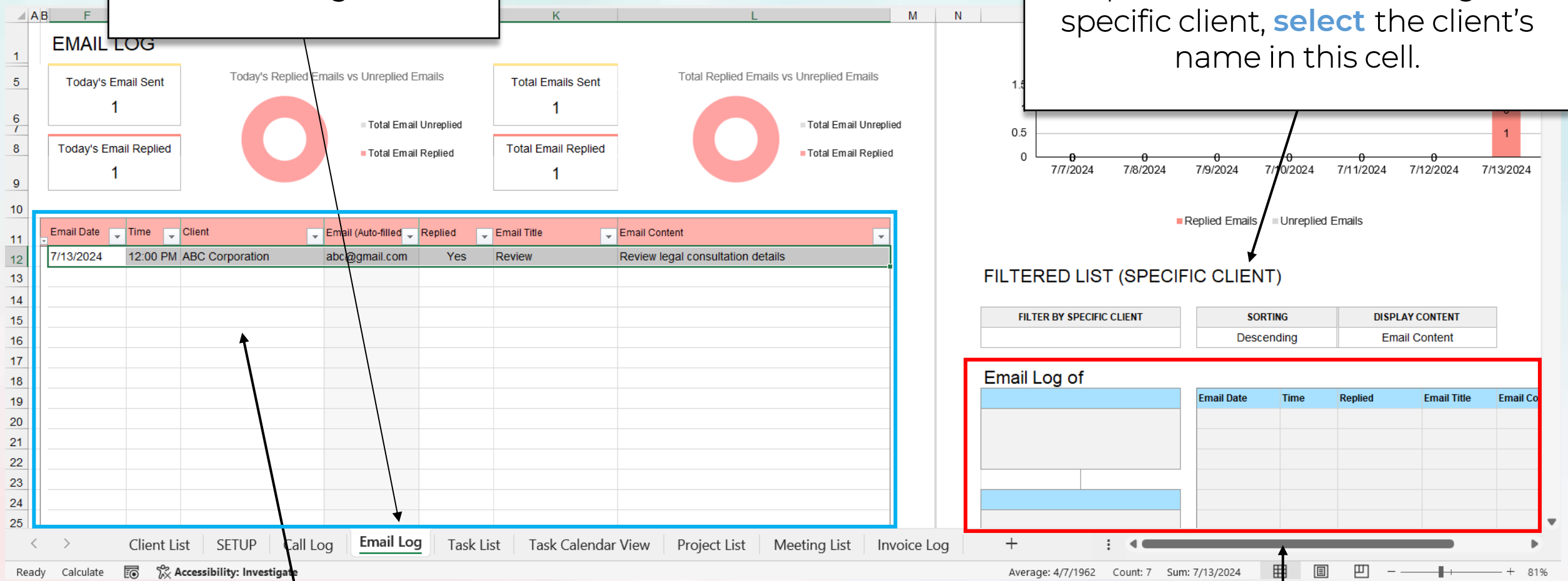
Step 7: After you have made a call, **Enter** your call details here

Note: **Do not** edit this section. They are automatically generated.

Email Log Tab

Step 9: **Click** on the 'Email Log' tab

Step 11: To view the email log of a specific client, **select** the client's name in this cell.



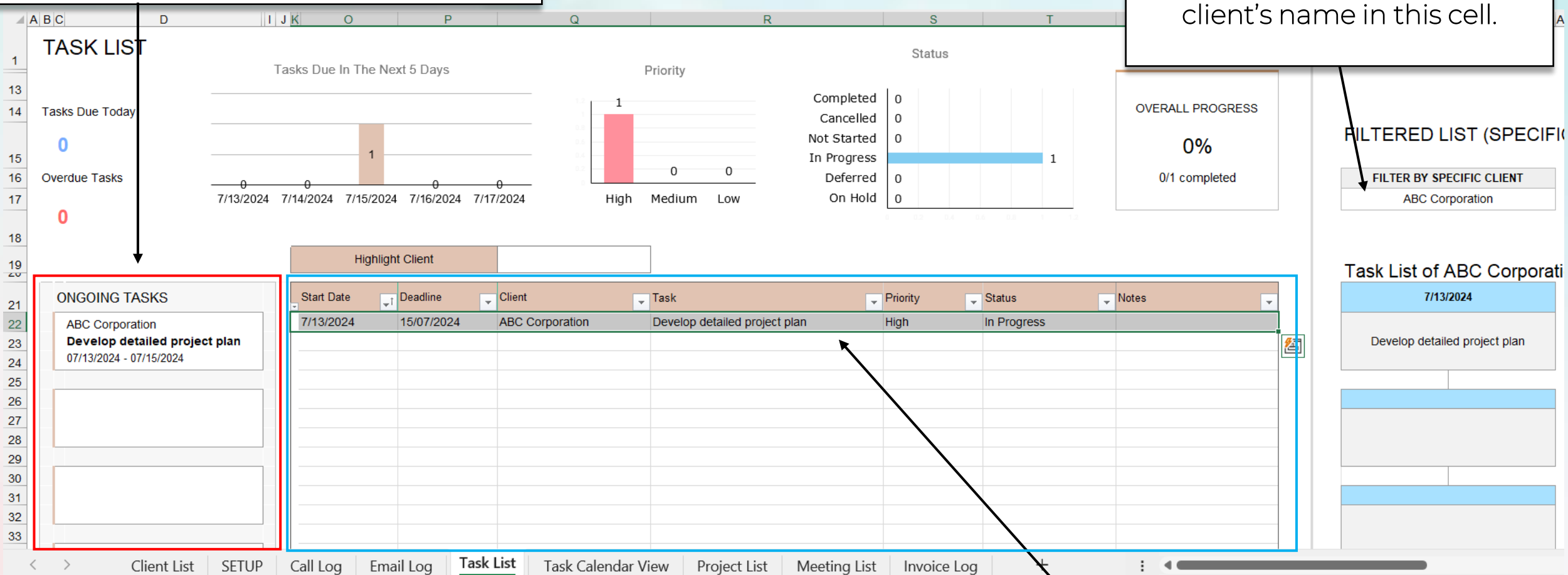
Step 10: After you have sent out an email, **Enter** your email details here

Note: **Do not** edit this section.

Note: **Do not** edit this section.

Task List Tab

Step 14: To view the task list of a specific client, **select** the client's name in this cell.

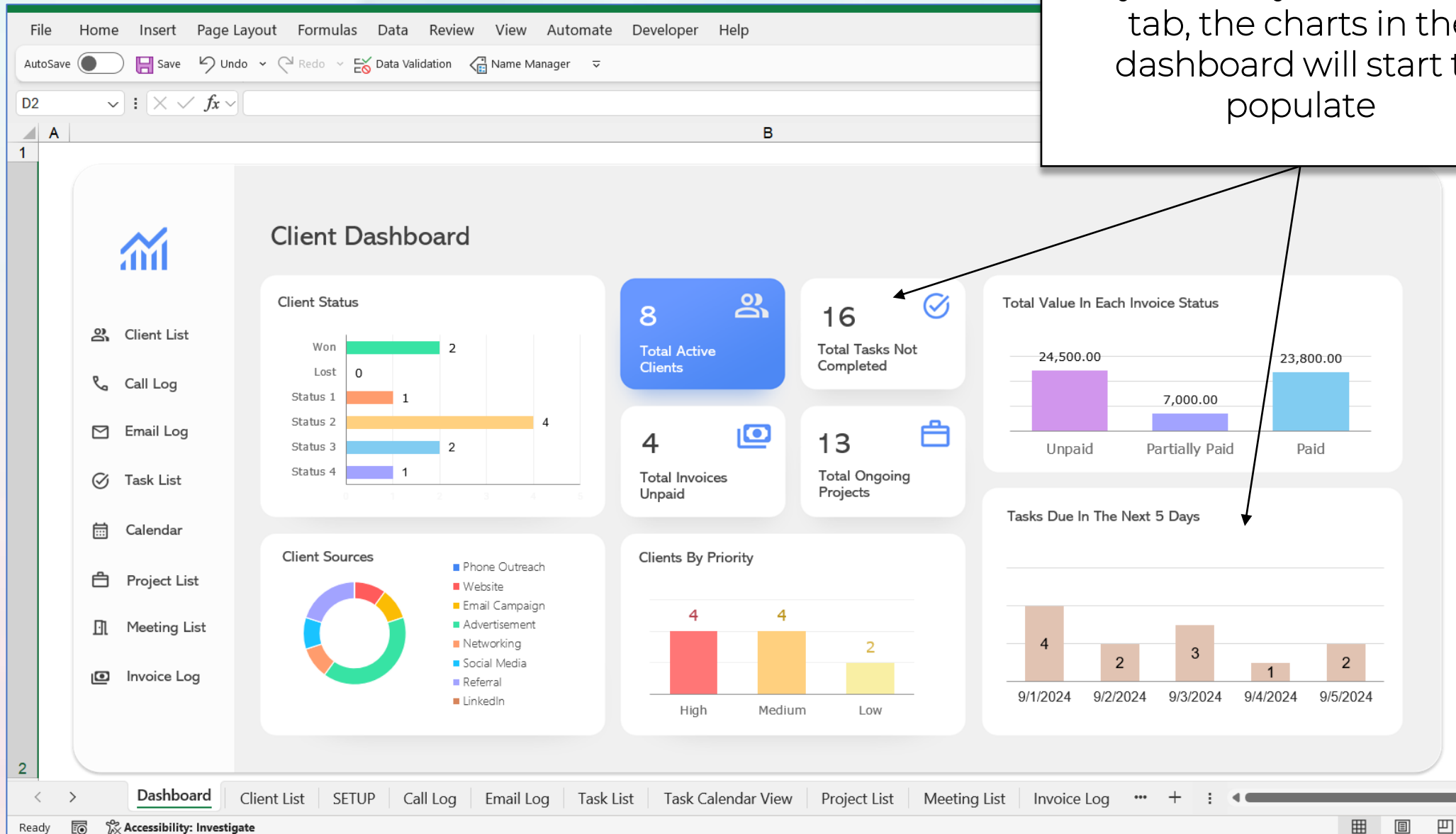


Step 12: **Click** on the 'Task List' tab

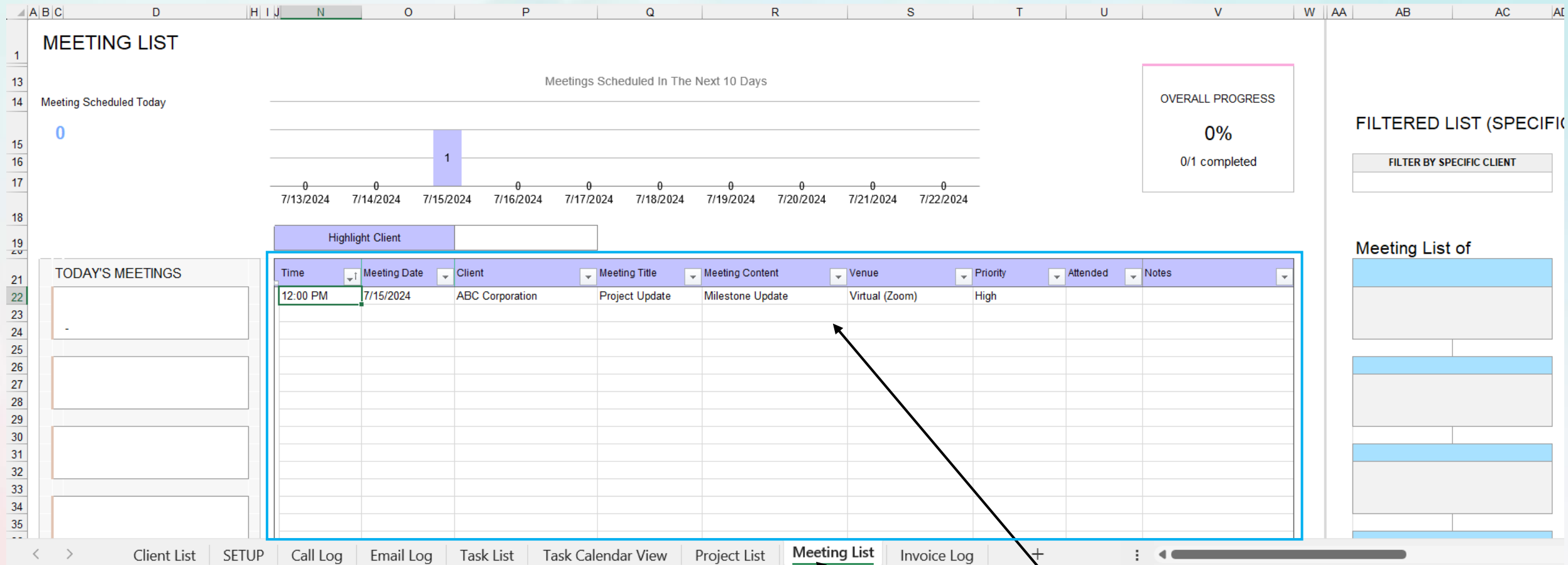
Step 13: **Enter** your tasks here.

Dashboard Tab

As you fill in your **'Task List'** tab, the charts in the dashboard will start to populate



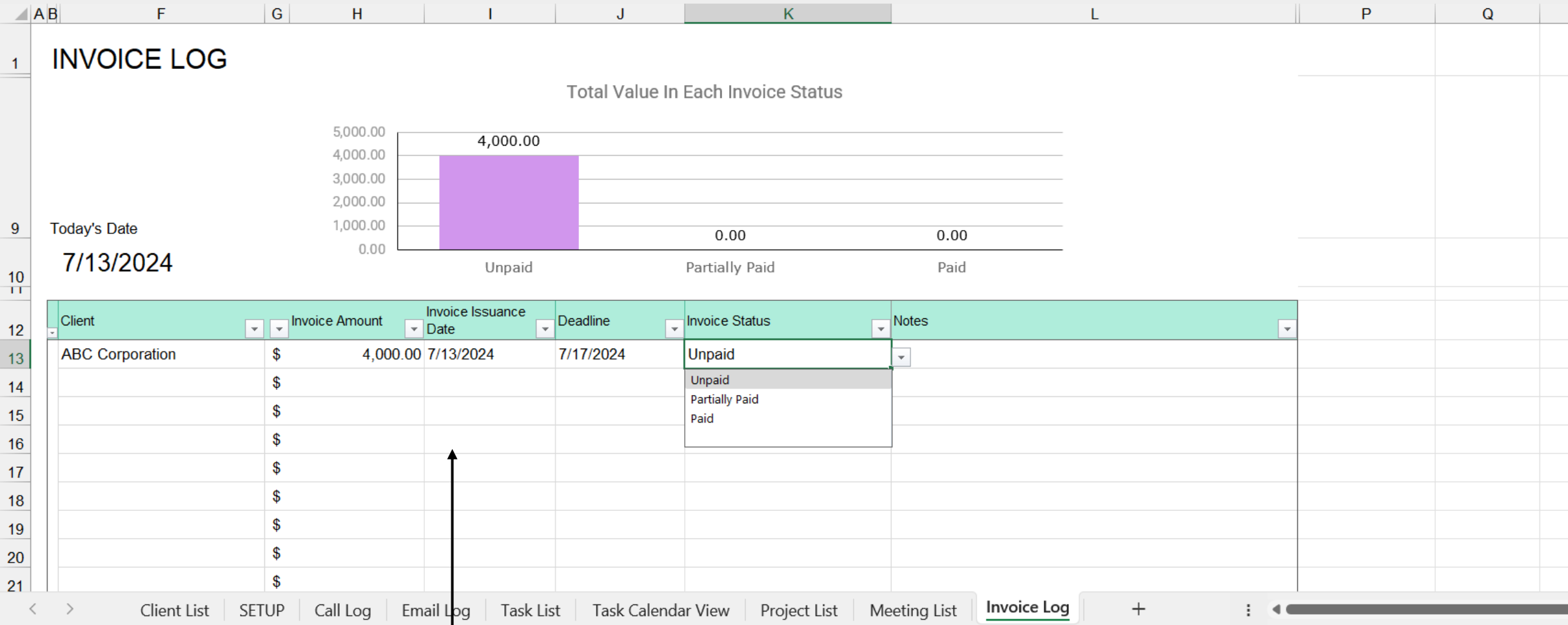
Meeting List Tab



Step 15: **Click** on the
'Meeting List' tab

Step 16: **Enter** your scheduled meeting details here.

Invoice Log Tab

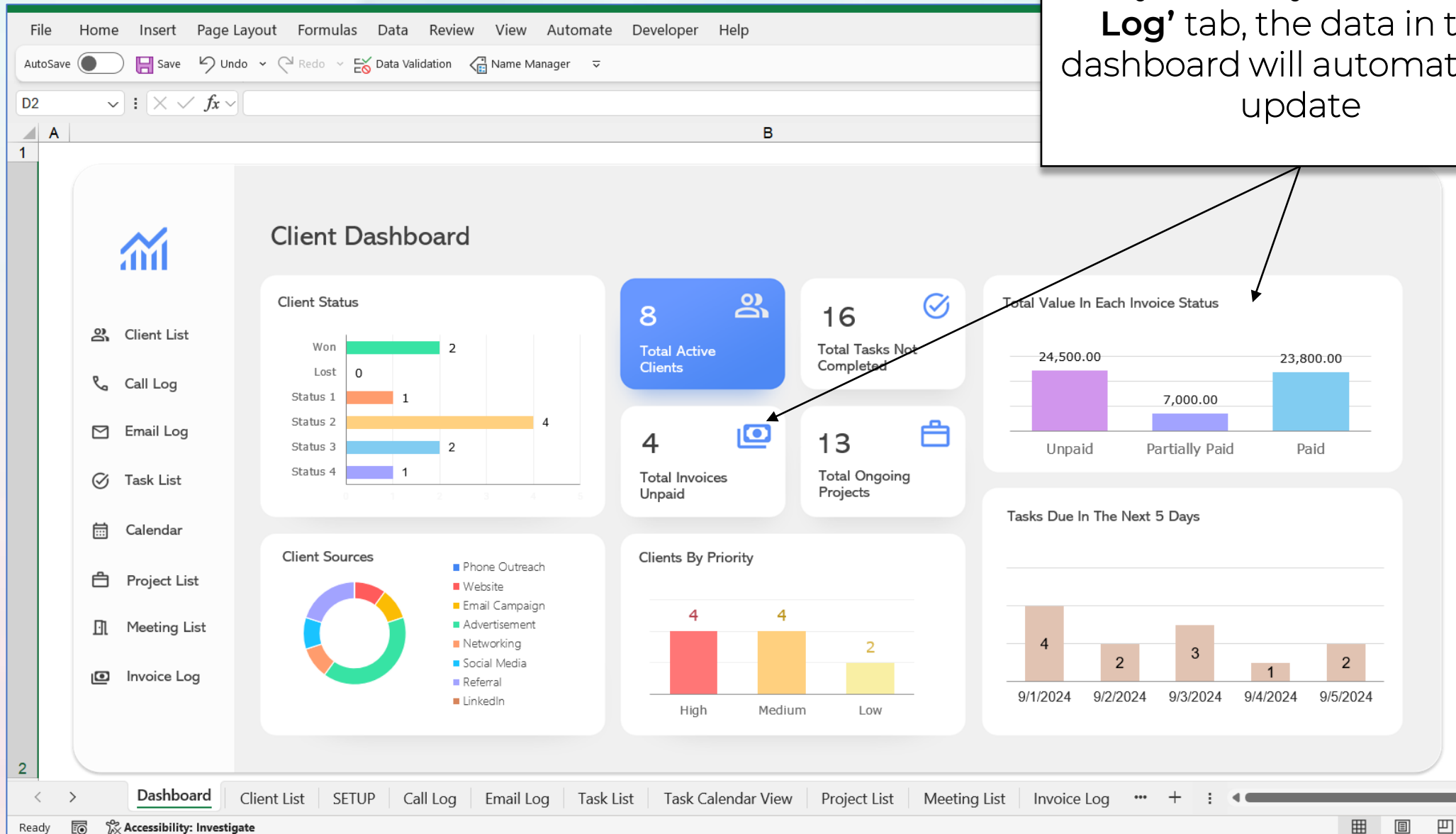


Step 18: **Enter & track all** your invoice records here.

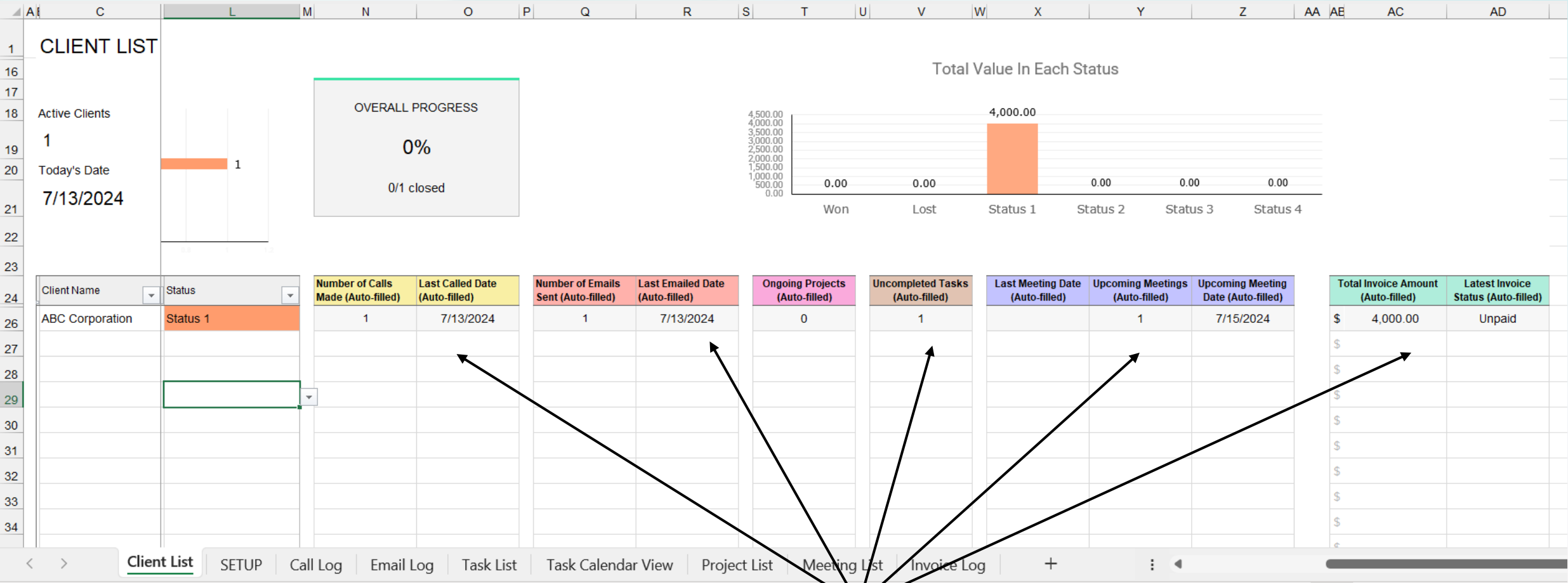
Step 17: **Click** on the 'Invoice Log' tab

Dashboard Tab

As you fill in your **'Invoice Log'** tab, the data in the dashboard will automatically update



Client List Tab



Note: All data that you have entered will be summarized in the **Client List tab**.

Step 19: **Set** the start date for your calendar to view specific month.

Start your calendar on a Monday or Sunday, it's up to you :)

Calendar View

	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
2																
3		START DATE	MONTH	SHOW COMPLETED TASKS	DUPLICATE TASKS	FILTER BY PRIORITY	FILTER BY CLIENT									
4		7/1/2024	JULY	X	X											
5																
6		MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY								
7		1	2	3	4	5	6	7								
8			Launch Digital Marketing Campaign	Develop Detailed Project Plan	Implement GreenTech Sustainability Program	Develop Detailed Project Plan	Revise Sales Plan	Develop Employee Wellness Program								
9			Conduct Legal Research on Recent Cases			Refine Architectural Designs for Presentation										
10			Implement GreenTech Sustainability Program													
11																
12																
13																
14																
15		8	9	10	11	12	13	14								
16		Refine Architectural Designs for Presentation		Survey Employees	Explore Research Collaborations	Plan and Organize Corporate Event	Develop Crop Rotation Plan	Launch Digital Marketing Campaign								
17		Plan and Prepare Sales														
18																
19																
20																
21																
22																
23		15	16	17	18	19	20									
24																
	<	>	Client List	SETUP	Call Log	Email Log	Task List	Task Calendar View	Project List	Meeting List	Invoice Log	+	:			

Step 21: **Filter** your calendar by priority or a specific client.

Need to Add Custom Columns?

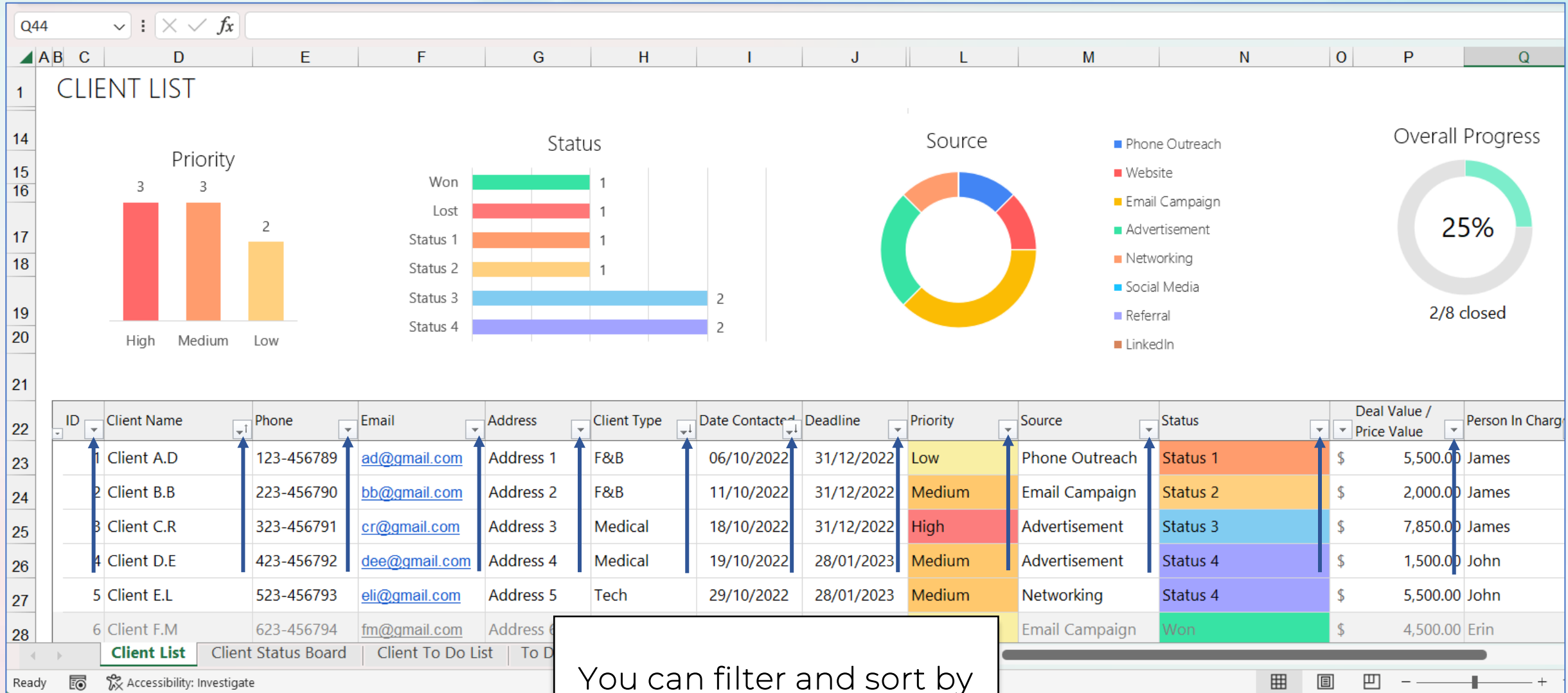
Watch the video below on How To Add Custom Columns In Your Client Tracker

WATCH HERE

<https://drive.google.com/file/d/1sX2YdtUp4S2V4VxlEIXxOI14lgokH0FF/view?usp=sharing>

Sort & Filter

Sort & Filter



Sort

Example: Sort by Source

Step 1: Click on the filter icon.

Step 2: You can sort in ascending order or descending order

The screenshot displays an Excel spreadsheet titled 'CLIENT LIST'. A filter menu is open for the 'Priority' column, showing options to sort A to Z, Z to A, or by color. A callout box points to the filter icon in the table header. The table contains 8 rows of client data, including ID, Client Name, Phone, Email, Address, Client Type, Date Contacted, Deadline, Priority, Source, Status, Deal Value / Price Value, and Person In Charge.

ID	Client Name	Phone	Email	Address	Client Type	Date Contacted	Deadline	Priority	Source	Status	Deal Value / Price Value	Person In Charge
1	Client A.D	123-456789	ad@gmail.com	Address 1	F&B	06/10/2022	31/12/2022	Low	Phone Outreach	Status 1	\$ 5,500.00	James
2	Client B.B	223-456790	bb@gmail.com	Address 2	F&B	11/10/2022	31/12/2022	Medium	Email Campaign	Status 2	\$ 2,000.00	James
3	Client C.R	323-456791	cr@gmail.com	Address 3	Medical	18/10/2022	31/12/2022	High	Advertisement	Status 3	\$ 7,850.00	James
4	Client D.E	423-456792	dee@gmail.com	Address 4	Medical	19/10/2022	28/01/2023	Medium	Advertisement	Status 4	\$ 1,500.00	John
5	Client E.L	523-456793	eli@gmail.com	Address 5	Tech	29/10/2022	28/01/2023	Medium	Networking	Status 4	\$ 5,500.00	John
6	Client F.M	623-456794	fm@gmail.com	Address 6	Tech	07/11/2022	28/01/2023	Low	Email Campaign	Won	\$ 4,500.00	Erin
7	Client G.J	723-456795	gjit@gmail.com	Address 7	Tech	09/11/2022	29/01/2023	High	Email Campaign	Lost	\$ 3,000.00	Erin
8	Client H.E	823-456796	hem@gmail.com	Address 8	Education	23/11/2022	30/02/2023	High	Website	Status 3	\$ 1,000.00	Erin

Filter

Example: Filter

AE102

CLIENT LIST

Priority

High Medium Low

Status

Source

Step 1: Click on the filter icon.

Step 2: Unselect all except "Status 4"

Step 3: Click "OK"

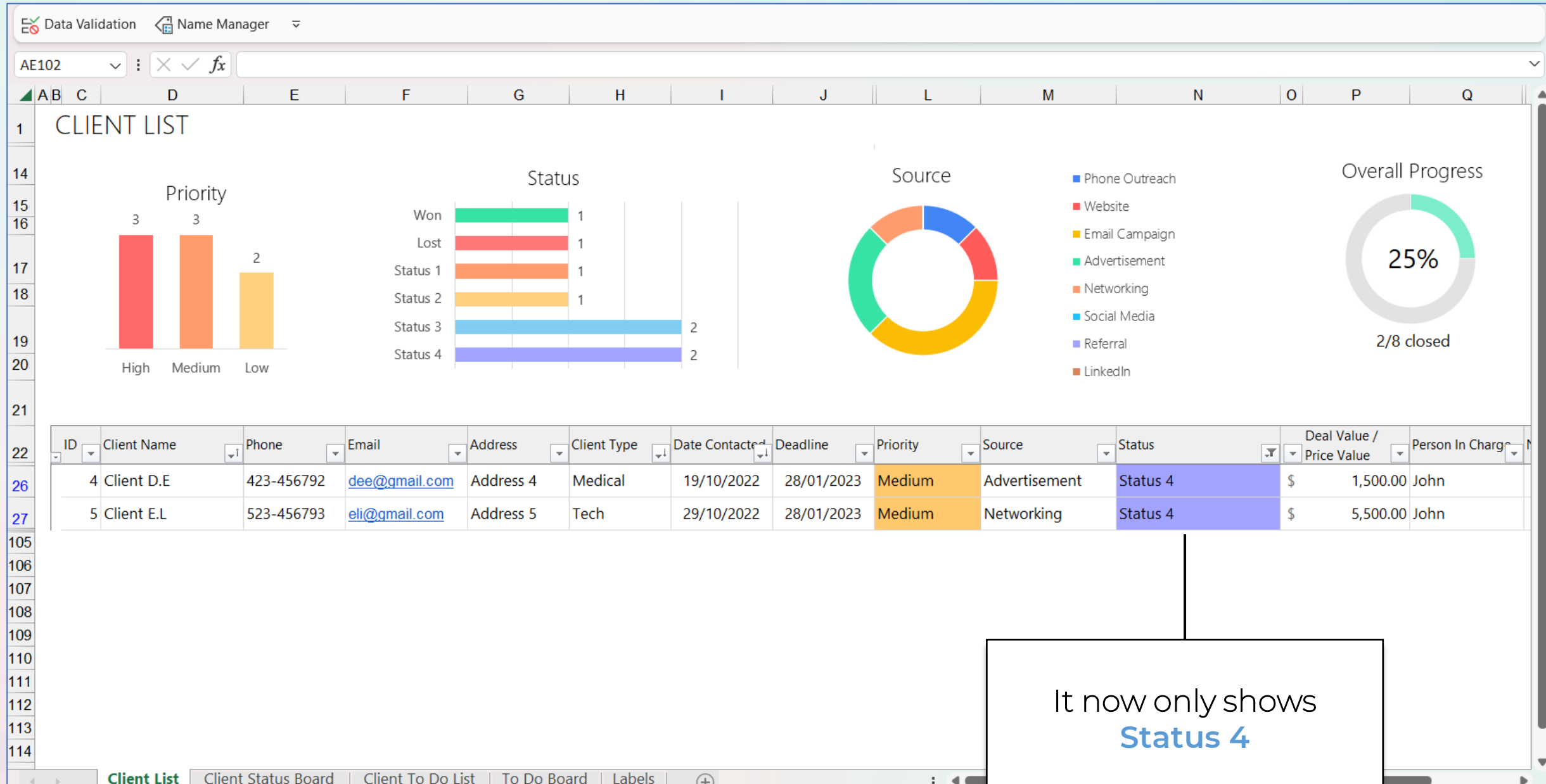
25%

2/8 closed

ID	Client Name	Phone	Email	Address	Client Type	Date Contacted	Deadline	Priority	Source	Status	Deal Value / Price Value	Person In Charge
1	Client A.D	123-456789	ad@gmail.com	Address 1	F&B	06/10/2022	31/12/2022	Low	Phone Outreach	Status 1	\$ 5,500.00	James
2	Client B.B	223-456790	bb@gmail.com	Address 2	F&B	11/10/2022	31/12/2022	Medium	Email Campaign	Status 2	\$ 2,000.00	James
3	Client C.R	323-456791	cr@gmail.com	Address 3	Medical	18/10/2022	31/12/2022	High	Advertisement	Status 3	\$ 7,850.00	James
4	Client D.E	423-456792	dee@gmail.com	Address 4	Medical	19/10/2022	28/01/2023	Medium	Advertisement	Status 4	\$ 1,500.00	John
5	Client E.L	523-456793	eli@gmail.com	Address 5	Tech	29/10/2022	28/01/2023	Medium			5,500.00	John
6	Client F.M	623-456794	fm@gmail.com	Address 6	Tech	07/11/2022	28/01/2023	Low			4,500.00	Erin
7	Client G.J	723-456795	gjti@gmail.com	Address 7	Tech	09/11/2022	29/01/2023	High			3,000.00	Erin
8	Client H.E	823-456796	hem@gmail.com	Address 8	Education	23/11/2022	30/02/2023	High	Website	Status 3	\$ 1,000.00	Erin

Client List Client Status Board Client To Do List To Do Board Labels

Example: Filter



You are good to go!

**If you have any questions, feel free to
message me.**