FINBITE

**Client Management Portal Template :**

https://finbite.notion.site/Dashboard-Your-or-firm-s-name-f1530e6d7ec1408f8c5ccd67e3383bb6?pvs=4

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**Video tutorials:**

| Sr. No. | Tutorial Name | Link |
|---|---|---|
| 1 | How to use Client Management Portal | https://youtu.be/j0f0-xBbTuU |
| 2 | How to configure Charts and Support Request Form | https://youtu.be/sSl72krGKl8 |
| 3 | How your client can use this portal<br>(You can send this link to your client along with private portal link, so he can know how to use his portal) | https://youtu.be/IeKNACLh3JE |

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Check steps to follow for reference on next page ⬇

## 1. How to add **Line Chart** on CA Dashboard:

1. Go to www.nochart.co/signup
2. Sign up on that site and click on **Create your first chart**
3. Click on **Connect to Notion**
4. Select your Notion Account from upper right corner
5. Click on Select pages
6. Select Returns (with last text **Return** and not Public access or Database) from Search bar
7. Allow access
8. Make a selection
    1) Choose Return Table
    2) Give name – Total Income
    3) Select 1st chart – line chart
    4) Sum of Fees of CA
    5) Click on Settings and set Prefix ₹
    6) Per – Date on which Return filed/Certificate Prepared
    7) Group by Month
    8) Order by - Date on which Return filed/Certificate Prepared
    9) Select any color of your choice
    a. Click Save and copy generated link
9. Go to Notion's **CA Dashboard**
10. Erase **Add line chart here** and write **/Embed**
11. Select Embed option and paste link here and click on **Embed link**
12. You will see your Line Char now.

How to add **Pie Chart** on CA Dashboard:

1. Go to www.nochart.co and Login
2. Go to Dashboard and click on **New**
3. Make a selection
    1) Choose Return Table
    2) Give name – Income by Category
    3) Select 3rd chart – pie chart
    4) Sum of Fees of CA
    5) Click on Settings and set Prefix ₹
    6) Per – Category
    7) Select any color of your choice or multi color option
    8) Click Save and copy generated link
4. Go to Notion's **CA Dashboard**
5. Erase **Add line chart here** and write **/Embed**
6. Select Embed option and paste link here and click on **Embed link**
7. You will see your Line Char now.

How to create **Support Request Form**?

1. Go to your Notion Account, click on 3 dots on upper right for Menu, Click on **connected to** and search Tally Forms and select it.
2. Go to https://tally.so/ and sign-up.
3. After signing up, go to https://tally.so/templates/support-request-form-template/mDpVlm
4. Click on **Use this template** from upper right corner
5. Click on **Publish**
6. Go to **Integrations** tab
7. Click on **Connect** Notion
8. Login Notion
9. Choose your database
10. Select **Support Requests DB** database
11. Connection name – CA Dashboard Support Request
12. What is your query map to > Query
13. Click on Add property
14. Email map to > Submitted By
15. Turn off Export existing submissions
16. Click on Connect with Notion
17. Go to Share tab and copy link
18. Go to Notion ? Database (Bottom of page) > Public Access > Click on Last Support Request with Document Emoji
19. Erase **Add Support Request form here** and write **/Embed** and paste the link
20. Adjust the size and it is ready for client to use