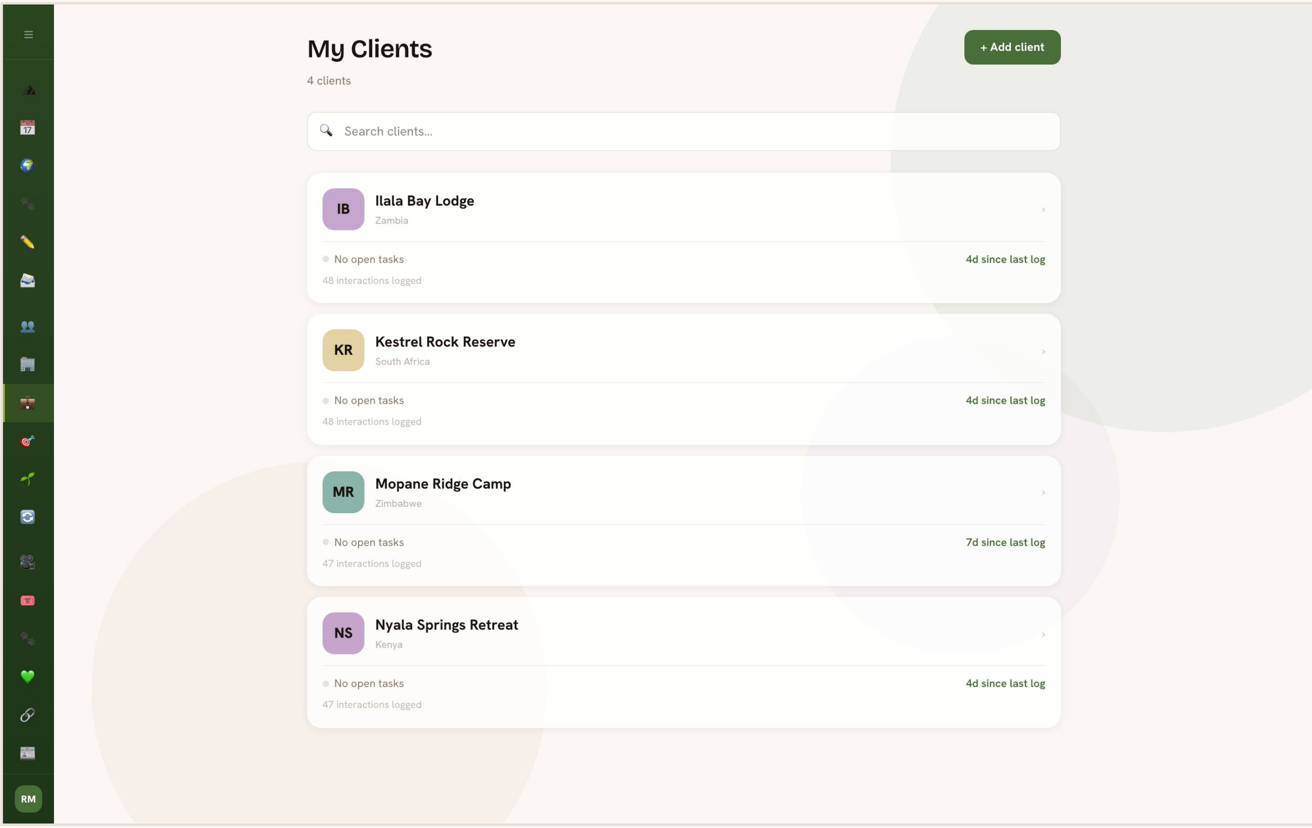
YOUR PEOPLE

My Clients

My Clients is your portfolio overview — at a glance you can see who has open tasks, who you've spoken to recently, and who's gone quiet.

Covers /dashboard/clients · for rep, dmc



The steps

01 Open My Clients

From the sidebar, open My Clients to see the properties and destinations you represent. The count under the heading tells you how many you're carrying.

02 Read a client card

Each card carries the client's name, trading name and country — your portfolio in one scroll.

03 Check open tasks

The dot and label on each card show outstanding work — a gold dot means there are open tasks to action.

04 Spot who's gone quiet

The right-hand label colour-codes how recently you last logged: green is recent, gold is getting on, terracotta means it's been a while. The line below counts interactions logged.

05 Search the portfolio

Search filters by name or trading name as you type — handy once the list grows. Clear it with the .

06 Open a client

Tap any card to open the full profile — interaction history, tasks and reporting.

07 Adding a client

New clients are added through the app — for example when you set up a client page or bring one in from the mobile app. They then appear here in your portfolio.

Next: A client's profile

Questions

What do the colours on the last-log label mean?

Green means you logged recently, gold means it's been a few weeks, and terracotta means it's been a while — a quick prompt for who to reach back out to.

What counts as an interaction?

Any meeting, call or note you've logged against the client. The "interactions logged" line tallies them so you can see how active the relationship is.

How do I add a new client?

Clients are added through the app — for example when you create a client page or add one in the mobile app — and then appear in your portfolio here.

Why can't I edit a client from this list?

This screen is your portfolio overview. Open a client to see their full profile, manage tasks, and generate reports.