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15 min read

The dashboard build kit

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TEMPLATES · 15 MIN READ · APR 20, 2026

Paste a morning prompt into Claude, teach it your business with a CLAUDE.md file, and connect the tools you already use. Takes about two hours the first time.

WHAT'S INSIDE

Section 1 is the daily dashboard prompt. Section 2 is a CLAUDE.md template so Claude knows your numbers, tools, and what to flag. Section 3 is the setup checklist for connecting Stripe, Sheets, Gmail, Notion, and Analytics.

COPY-PASTE TEMPLATES

Swap out data sources you don't use. The prompt works with whatever you can give Claude access to.

MORNING DASHBOARD PROMPT

```
# DAILY BUSINESS DASHBOARD
```

```
You are a business intelligence assistant for [YOUR BUSINESS NAME].
```

```
Read the data sources below and generate my morning dashboard.  
Be concise. Flag anything that needs attention today.
```

```
--- DATA SOURCES ---
```

```
STRIPE: Pull revenue month-to-date, new customers this  
week, any failed or overdue payments.
```

```
GOOGLE SHEETS: Read the "Weekly Tracker" tab. Pull  
current lead count, pipeline value, and any rows  
marked as overdue or at-risk.
```

```
GMAIL: Scan the last 48 hours. Flag any client emails  
needing a response and any payment or invoice threads.
```

```
NOTION: Check open tasks. List anything overdue by  
more than 2 days with the assigned owner.
```

```
ANALYTICS: Pull traffic this week vs last week.  
Note any significant drop or spike.
```

```
--- OUTPUT FORMAT ---
```

```
DASHBOARD - [DATE]
```

```
Revenue MTD: $X (vs last month: +/- X%)  
New leads this week: X  
Open pipeline: $X across X deals  
Cash position: [healthy / watch / urgent]
```

```
ALERTS:
```

```
- [anything requiring action today]
```

```
FOLLOW UPS:
```

```
- [any email or task needing a response]
```

CLAUDE.MD BUSINESS CONTEXT

[Your Business Name] – Business Context

What I do

[Describe your business in 2 sentences.]

Example: We're a residential HVAC company serving San Diego.

We run 8-12 jobs per week with a team of 4 technicians.

My numbers (update monthly)

- Revenue goal: \$[X]/month
- Average job value: \$[X]
- Lead target: [X] new leads/week
- Current team size: [X]

My tools

- Payments: [Stripe / Square / other]
- CRM / pipeline: [Sheets / HubSpot / other]
- Tasks: [Notion / Asana / other]
- Email: [Gmail / Outlook]
- Analytics: [GA4 / other]

What good looks like

[Tell Claude what a healthy week looks like for you.]

Example: A good week is 10+ leads, no overdue invoices, and revenue tracking at or above monthly goal pace.

What I need flagged immediately

- Any invoice overdue more than 7 days
- Revenue tracking more than 15% below goal pace
- Any client email unanswered for more than 24 hours
- Pipeline stalled deals (no activity in 5+ days)

Tone

Be direct. Give me the number first, context second.

No filler. Flag problems clearly, don't soften them.

SETUP WALKTHROUGH

Connect tools one at a time. Test the prompt after each connection.

- Install Claude Code from claude.ai/code
- Create a project folder (e.g. my-dashboard) and add your filled-in CLAUDE.md
- Connect Stripe via MCP or weekly CSV export to a data folder
- Connect Google Sheets via MCP or a read-only share link
- Connect Gmail via MCP (read/search only — no send required)
- Connect Notion via MCP or nightly markdown export of open tasks

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- Connect Analytics via weekly CSV or GA4 MCP connector
 - Run the dashboard prompt in Claude Code and refine over the first week
 - Optional: automate with Make, Zapier, or cron to email output every morning
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Questions? Reply to the newsletter or reach out via email.

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