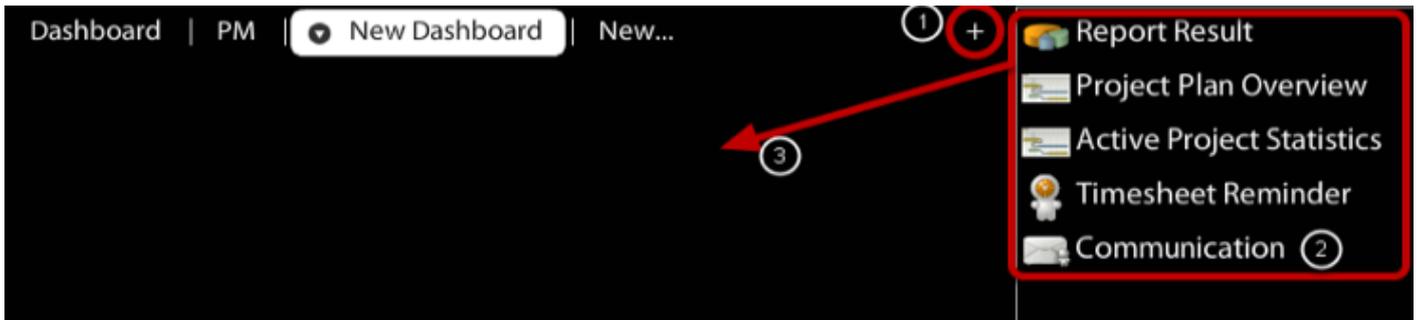


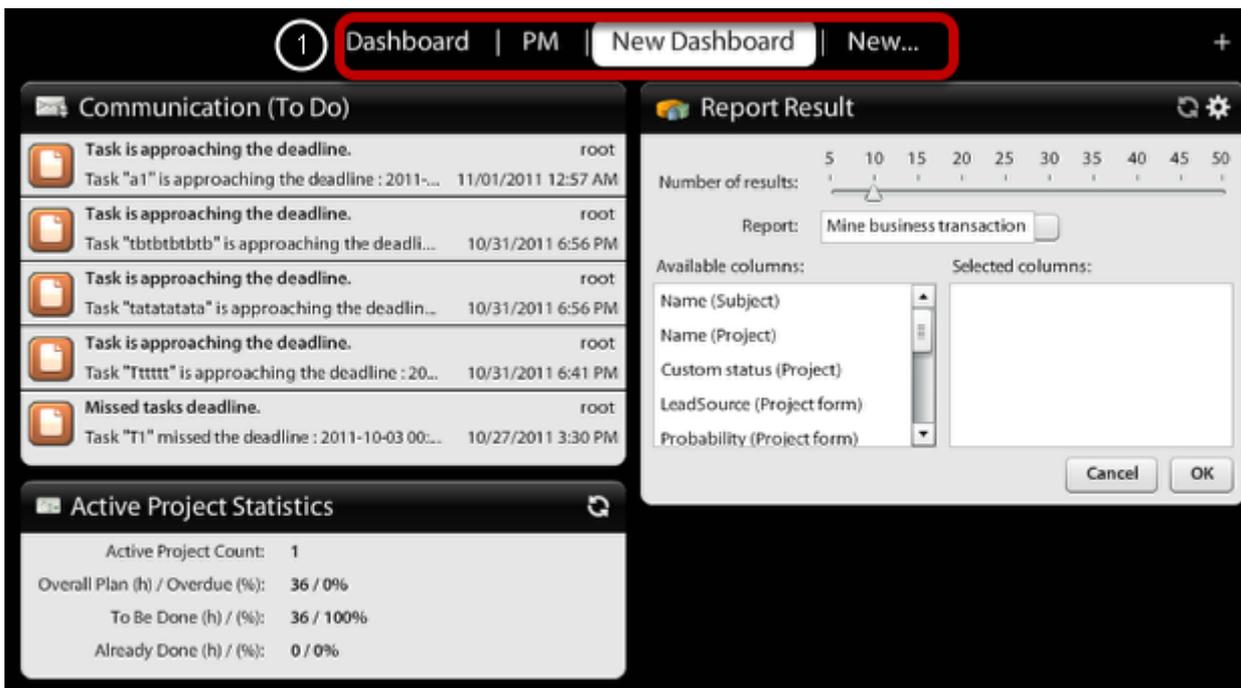
Set-up Dashboard

How to Add/Remove Dashboard Widgets?

It is quite easy! Follow this manual:

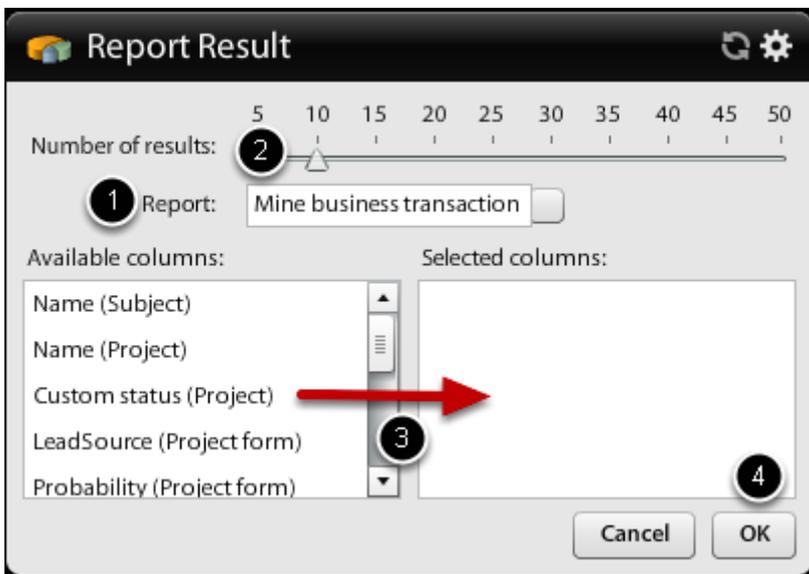


- After you **click on plus (1)** you'll get **widget menu on right side (2)**. Choose widgets you would like to have on your dashboard, **drag&drop them into Dashboard (3)**.



How to Adjust Report Widget?

- You can even create more dashboards for different needs (f.e.marketing dashboards, sales, project planning, etc.)
- You can switch them by using **top menu (1)**



- Setup Report Results

1. choose report (create special ones)
2. setup how many results you want to see
3. drag&drop colomns you want to see
4. click on OK



- You can see all your widgets including report results on your dashboard

How to adjust Dashboard for the whole organization?

Users that are authorized to update Organization settings (usually Admins or Power Users) can set-up home screen of Dashboard for the whole company. Using dashboard switch on home page you can show settings of **Organization Widgets** & update them (Add/Remove Dashboard widgets for the whole Organization).

- 1.) Click on (+) icon on Dashboard top menu
- 2.) Click on (>) drop-down icon next to Dashboard top menu & switch to **Organization Widgets**
- 3.) Adjust any widgets (add/remove) that are displayed for the whole organization

Dashboard | New...
+

My sales opportunities
My Widgets

Name	Name
▼ Daily News	Story Selling
▼ Bonner Springs-Edwardsville Chie	SO: System Support
▼ Acme Corporation	Sales opportunity
▼ Acme Corporation	OP INVENTORO XYZ
▼ Superstars.co.uk	Sales opportunity
▼ Superstars.co.uk	Sales opportunity
▼ Acme Corporation	SO: Training
▼ Acme Corporation	SO: Seminar

Upcoming presentations
No result.

Recent Sales Opportunities
My Widgets

Name	Name
▼ Acme Corporation	SO: Training
▼ Acme Corporation	SO: Seminar
▼ Acme Corporation	Sales opportunity
▼ Acme Corporation	OP INVENTORO XYZ
▼ Bonner Springs-Edwardsville Chie	SO: System Support
▼ Daily News	Story Selling
▼ Superstars.co.uk	Sales opportunity
▼ Superstars.co.uk	Sales opportunity

Communication (To Do)

- Task is approaching the deadli... root

Task "Please solve request." is ap... 07/10/2012 11:01 AM
- Task is approaching the deadli... root

Task "New Task" is approaching... 06/04/2012 11:28 AM
- Re: Estimate Luke Perry <perryluke33@gmail...>

Hey, thx. 05/06/2012 12:09 AM
- Notification: info Admin Joe

05/05/2012 8:21 PM
- Task is approaching the deadli... root

Task "Prepare proposal for Cons... 06/30/2010 12:27 PM

- Report Result
- Project Plan Overview
- Active Project Statistics
- Communication
- Timesheet Reminder

Revision #1

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