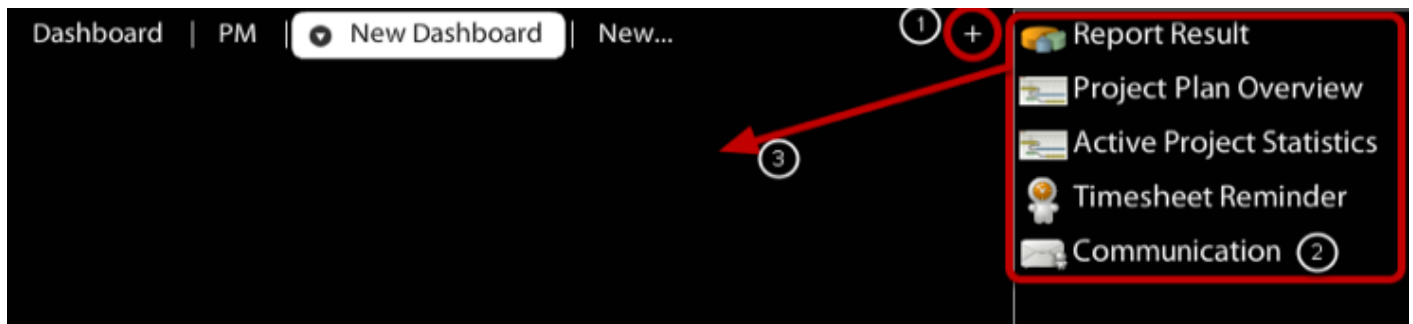


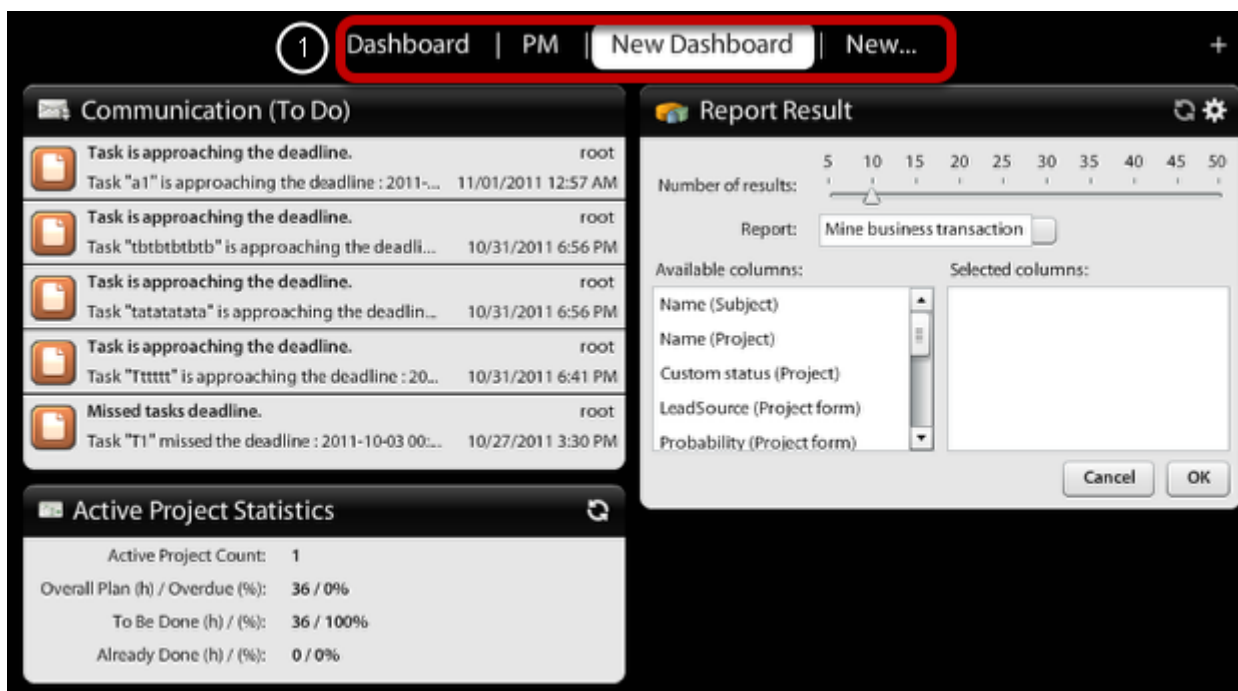
# Set-up Dashboard

## How to Add/Remove Dashboard Widgets?

It is quite easy! Follow this manual:

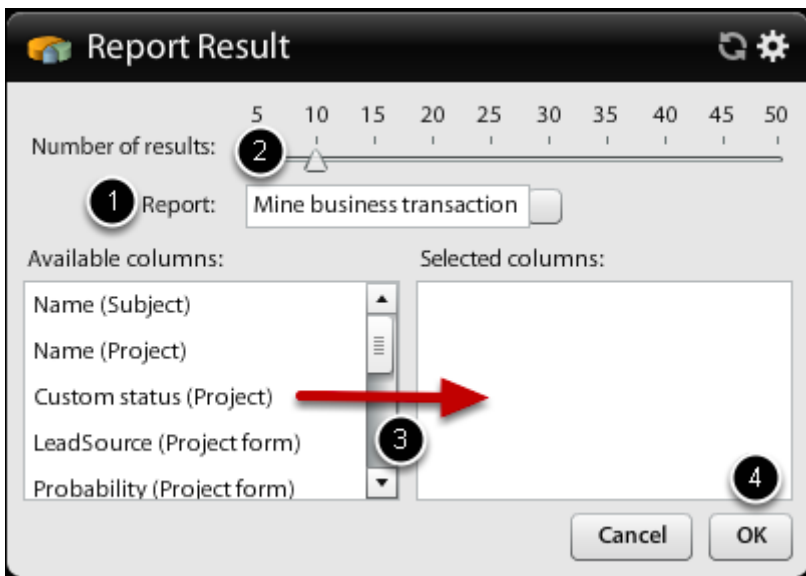


- After you **click on plus (1)** you'll get **widget menu on right side (2)**. Choose widgets you would like to have on your dashboard, **drag&drop them into Dashboard (3)**.



## 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 columns 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

| 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        |

Recent Sales Opportunities

| 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  |

Upcoming presentations

No result.

Communication (To Do)

|                                       |                                  |                     |
|---------------------------------------|----------------------------------|---------------------|
| Task is approaching the deadli...     | root                             | 07/10/2012 11:01 AM |
| Task "Please solve request." is ap... |                                  |                     |
| Task is approaching the deadli...     | root                             | 06/04/2012 11:28 AM |
| Task "New Task" is approaching...     |                                  |                     |
| Re: Estimate                          | Luke Perry <perryluke33@gmail... | 05/06/2012 12:09 AM |
| Hey, thx.                             |                                  |                     |
| Notification: Info                    | Admin Joe                        | 05/05/2012 8:21 PM  |
| Task is approaching the deadli...     | root                             | 06/30/2010 12:27 PM |
| Task "Prepare proposal for Cons...    |                                  |                     |

Report Result

Project Plan Overview

Active Project Statistics

Communication

Timesheet Reminder

Revision #1

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