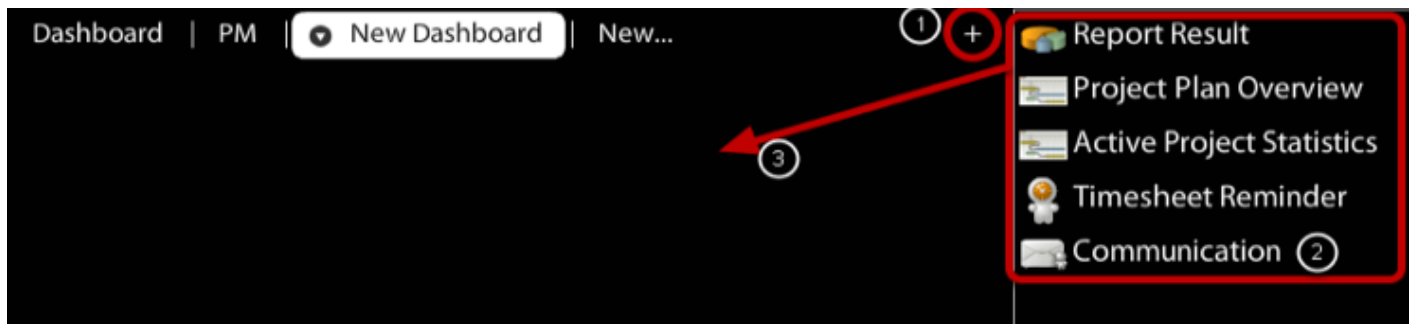


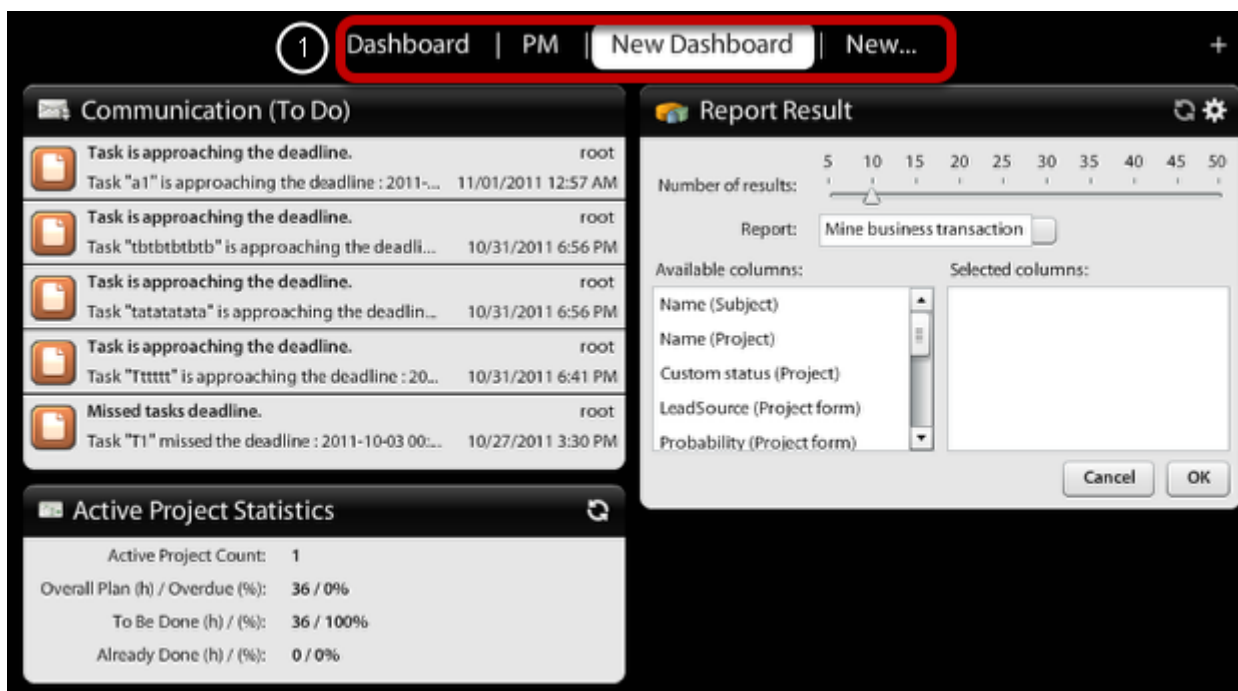
Set-up Dashboard

How to Add/Remove Dashboard Widgets?

It is quite easy! Follow this manual:

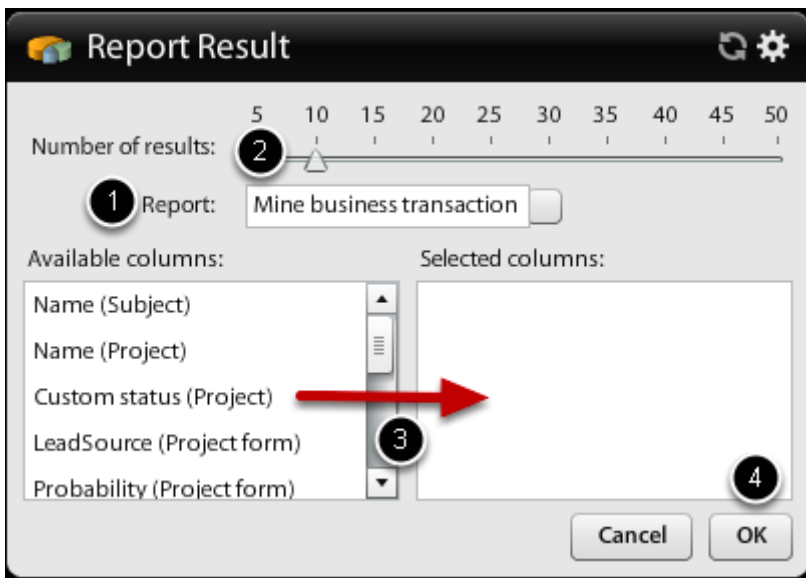


- After you **click on plus (1)** you'll get **widget menu on right side (2)**. Choose widgets you would like to have on your dashboard, **drag&drop them into Dashboard (3)**.



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 | |
| 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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