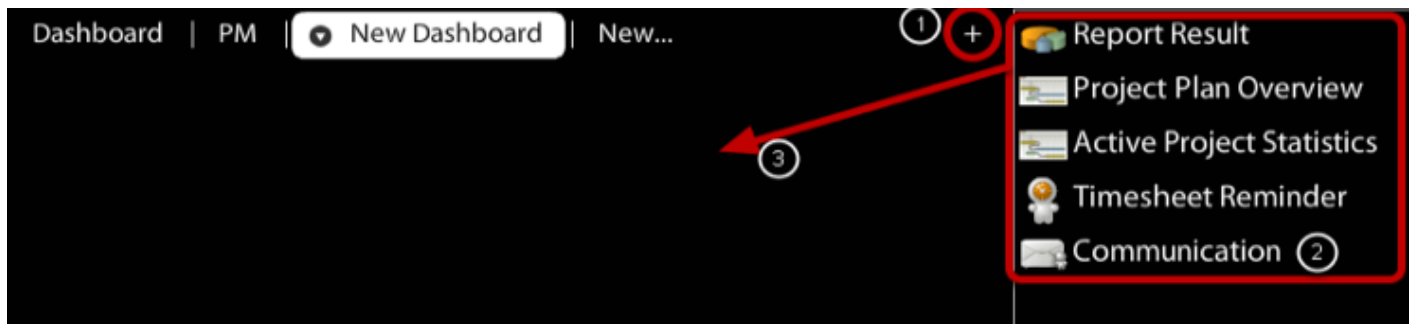


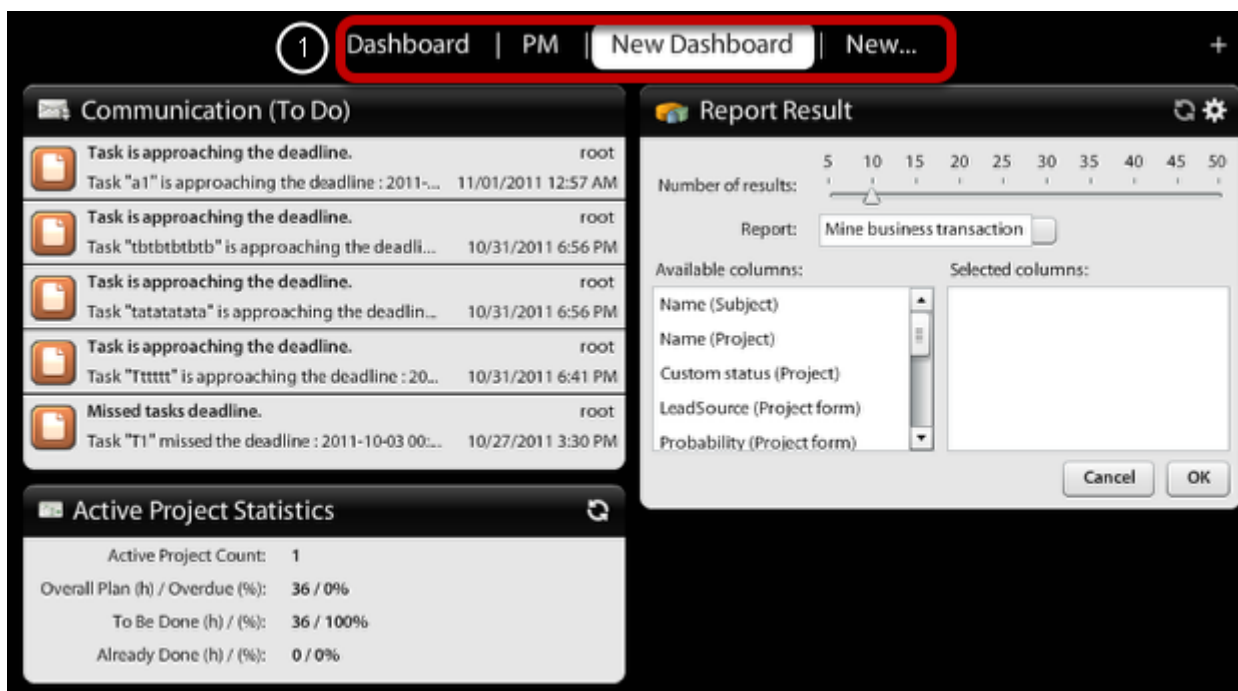
Set-up Dashboard

How to Add/Remove Dashboard Widgets?

It is quite easy! Follow this manual:

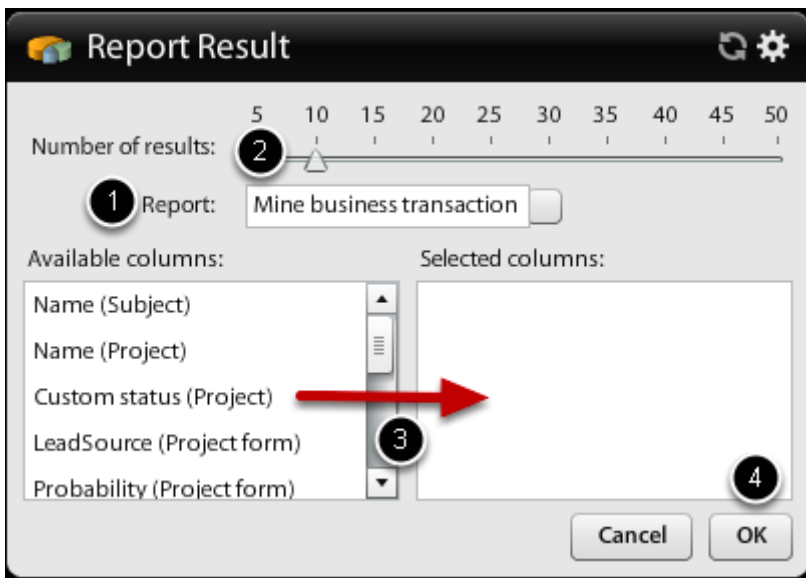


- After you **click on plus (1)** you'll get **widget menu on right side (2)**. Choose widgets you would like to have on your dashboard, **drag&drop them into Dashboard (3)**.



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...

Organization Widgets
Profile Widgets
My Widgets

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
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

Created 16 March 2020 17:18:57 by Jan Safka

Updated 16 March 2020 17:22:52 by Jan Safka