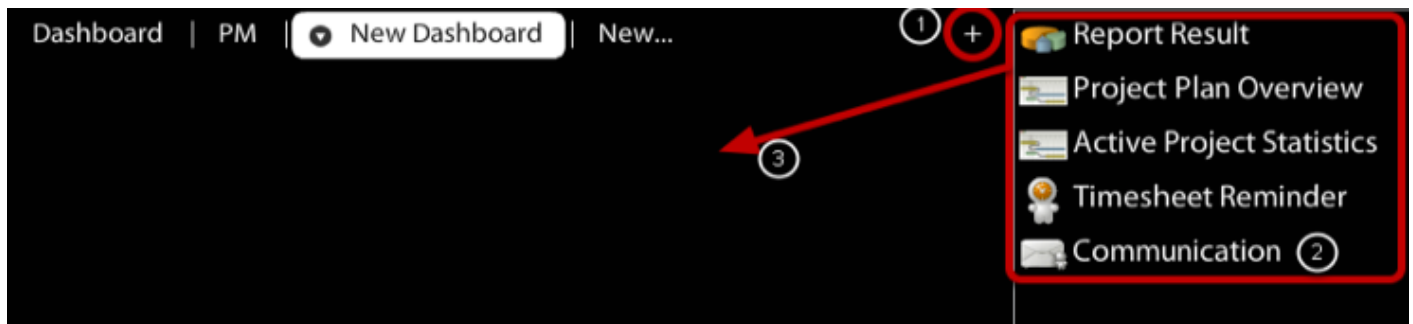


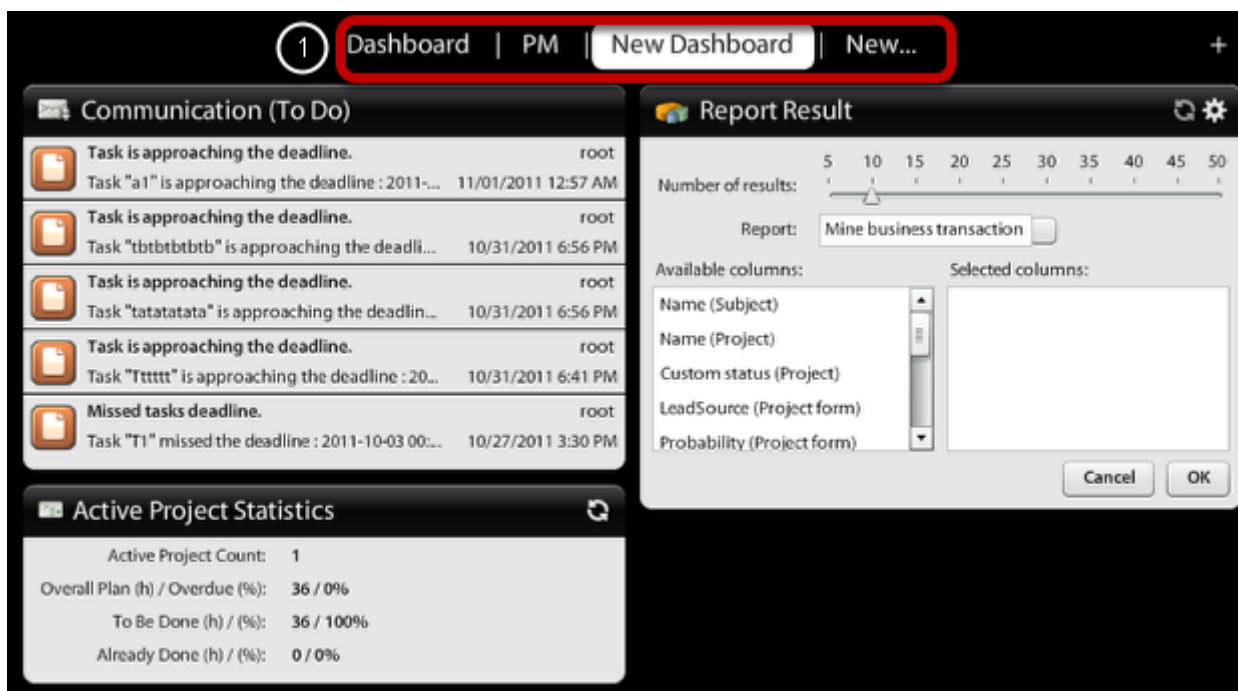
Set-up Dashboard

How to Add/Remove Dashboard Widgets?

It is quite easy! Follow this manual:

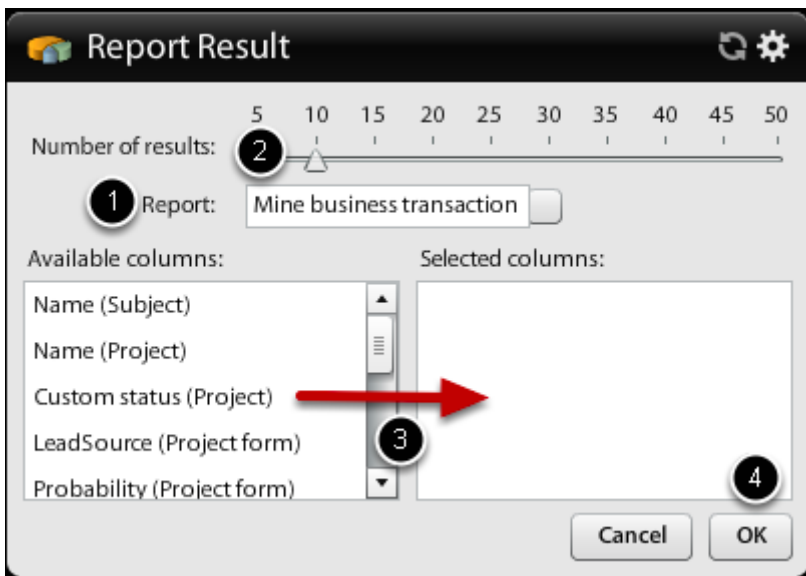


- After you **click on plus (1)** you'll get **widget menu on right side (2)**. Choose widgets you would like to have on your dashboard, **drag&drop them into Dashboard (3)**.



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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