

The Dashboard which is accessed via the Home menu contains a series of pages comprised of interactive dashlets. Each dashlet houses an easy-to-read sales chart or graph. These include pending business and ranking information. Multiple dashlets can be on one page, and new pages may be added to the existing Dashboard allowing for maximum customization.

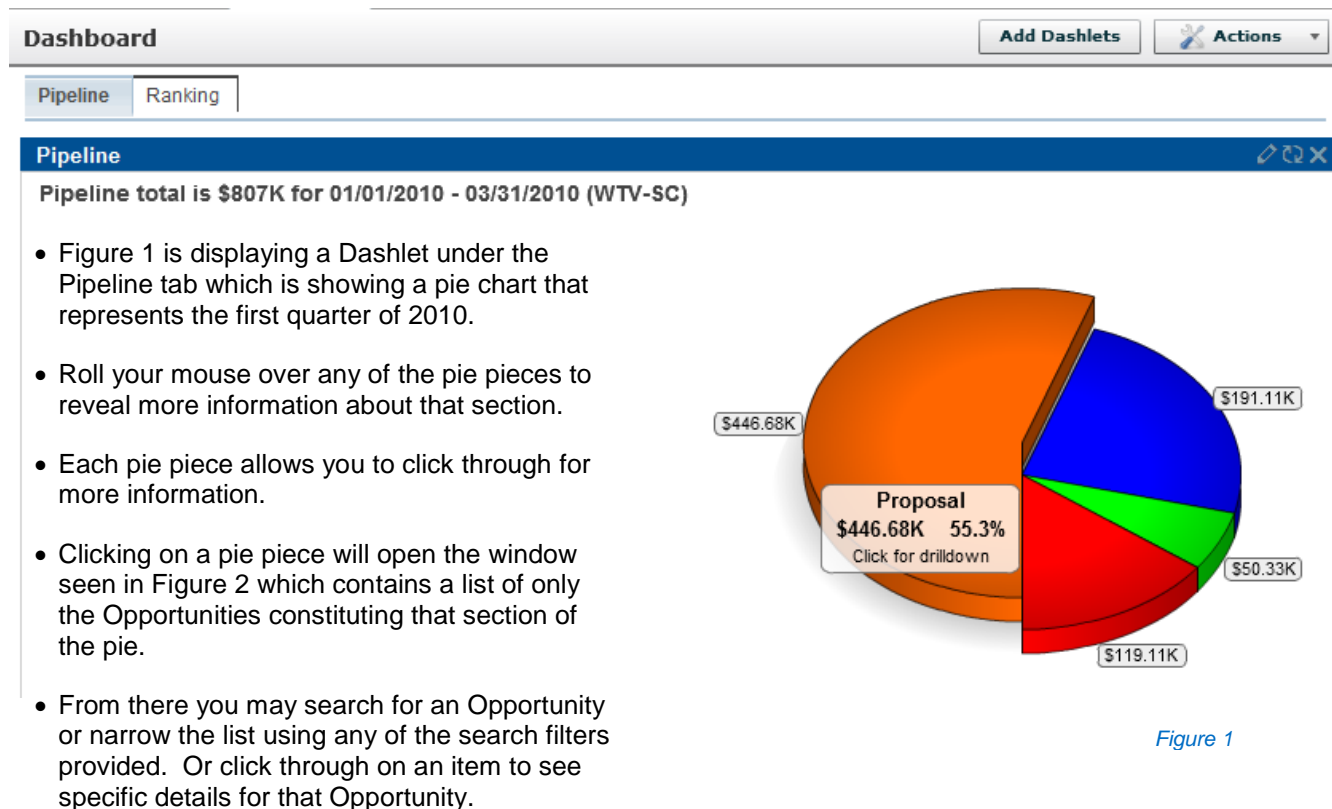


Figure 1

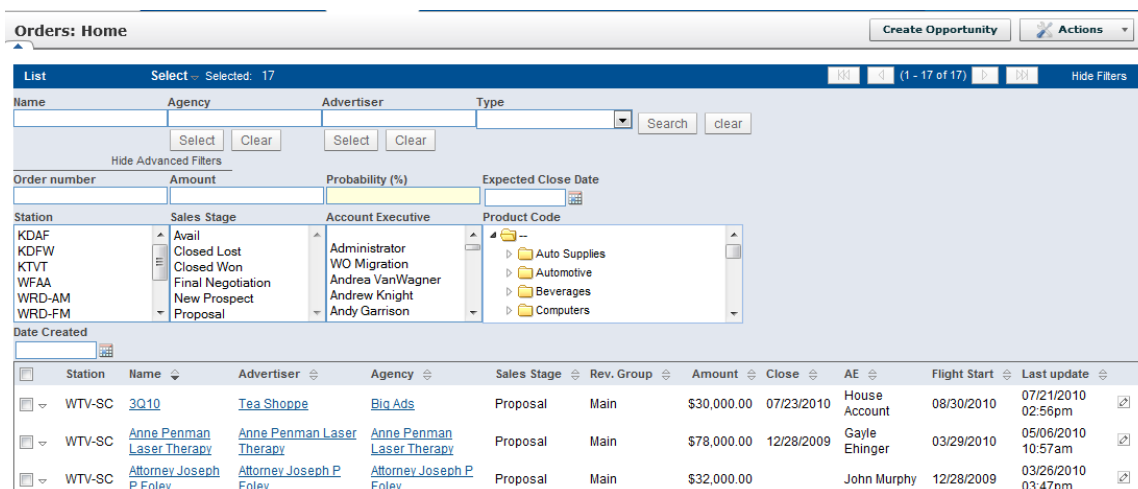

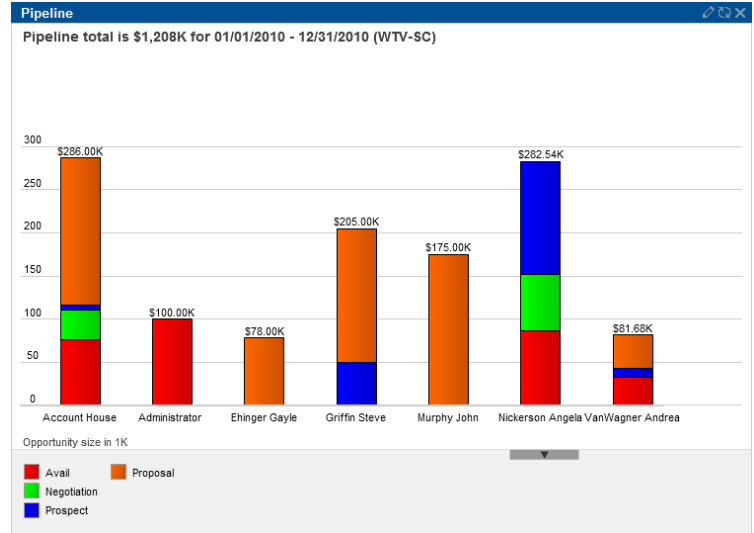


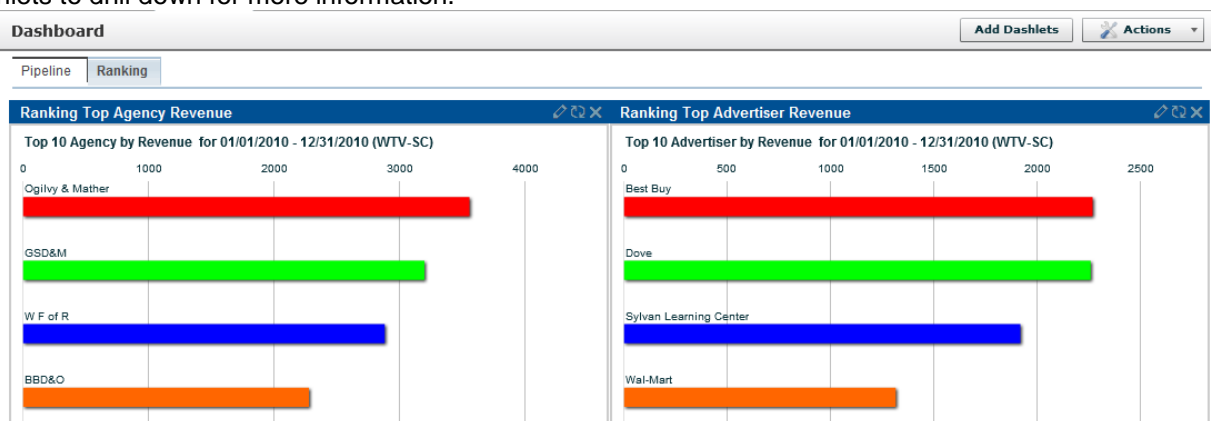
Figure 2

- The other type of graphic seen under the Pipeline tab is a bar graph, which can be viewed as vertical or horizontal bars.
- The behavior of this bar graph is similar to the pie chart, clicking on a selected bar will open the Orders:Home window.
- Clicking the edit icon  for **any** of the Dashlets allows you to edit the information that is displayed. Such as title, page size, date range and how revenue is displayed or ranked.





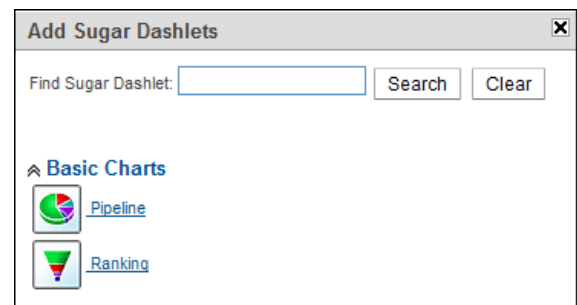
Ranking Tab

The Dashlets under the Ranking tab offer a quick ranking of new and/or regular business by Advertiser, Agency or AE. The revenue can be ranked by business Won, Lost or in the Pipeline. Click on any of the bars in these Dashlets to drill down for more information.



Adding a Dashlet



- Clicking the **Add Dashlets** button at the top of the screen opens the Add Dashlets window.
- Select the type of chart you would like to add to the page by clicking the appropriate link, then close the window.
- Clicking Edit  on the newly added Dashlet allows you to quickly customize the information yielded from the chart.
- Arrange dashlets in any order on a screen by dragging and dropping to any area of a screen.
- Delete a dashlet from a page by clicking  at the top of the dashlet you want to remove.



Add Sugar Dashlets

Find Sugar Dashlet:

Basic Charts

-  [Pipeline](#)
-  [Ranking](#)



Adding a Page

The dashboard can hold several pages. So a new page may be added to house additional dashlets. Each dashlet is then edited so you can see as much or as little information as you want on your own dashboard customized by you to your preferences.

- From the **Actions** drop down menu select **Add Page**.
- You may title the page however you would like and select the number of columns you would like on the page.
- Click **Submit** to accept the changes.
- Once the new page is created Dashlets may be added.

A screenshot of the "Add Page" dialog box. It has a title bar "Add Page" with a close button (X). Below the title bar, there is a "Page Name:" label followed by a text input field. Underneath that is a "Number of Columns:" label followed by three radio button options labeled 1, 2, and 3. At the bottom right, there are two buttons: "Submit" and "Cancel".

Add Page

Page Name:

Number of Columns:

☐ 1 ☒ 2 ☐ 3

Notes

- It is important to note that Account Executives will only be able to see their own information, where as Sales Management with proper security rights will be able to view all AE's and stations.