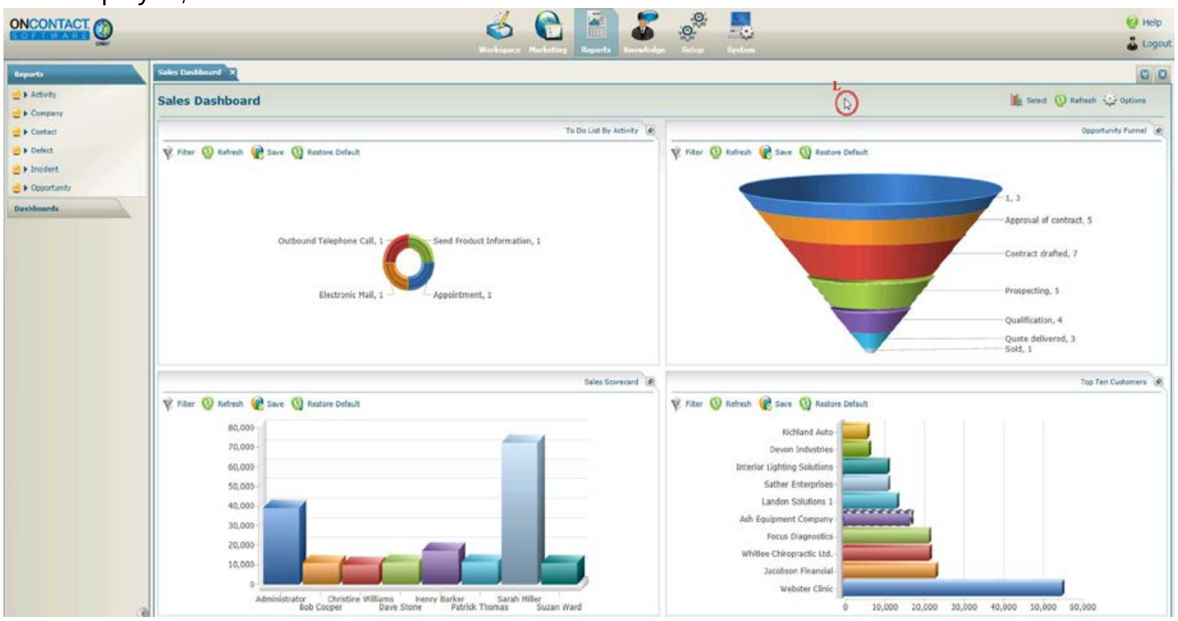
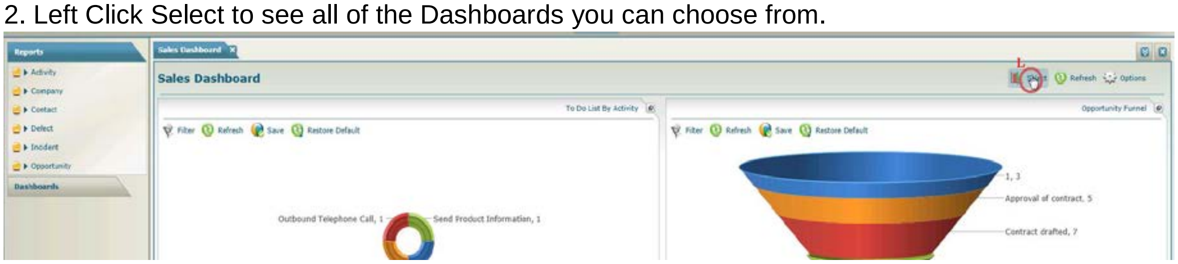
Using the Sales Dashboard

1. The Sales Dashboard displays up to four panels at a time. You can choose the set of panels you want displayed, and set different filters for each of them.



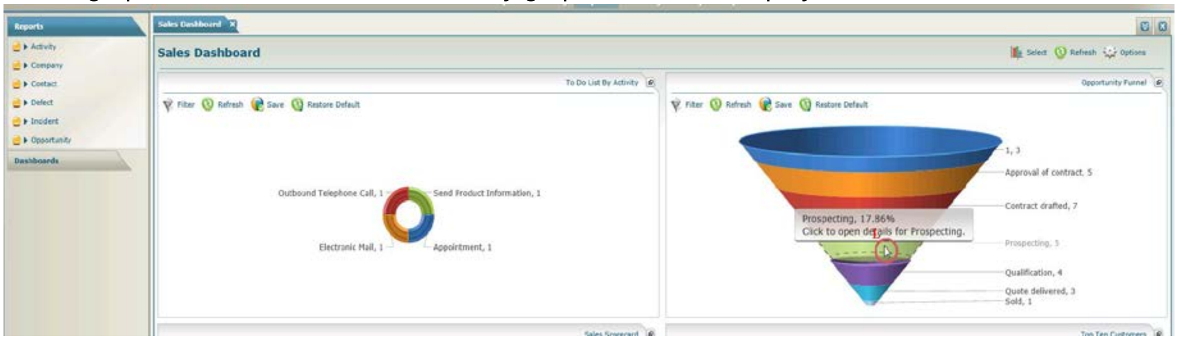
2. Left Click Select to see all of the Dashboards you can choose from.



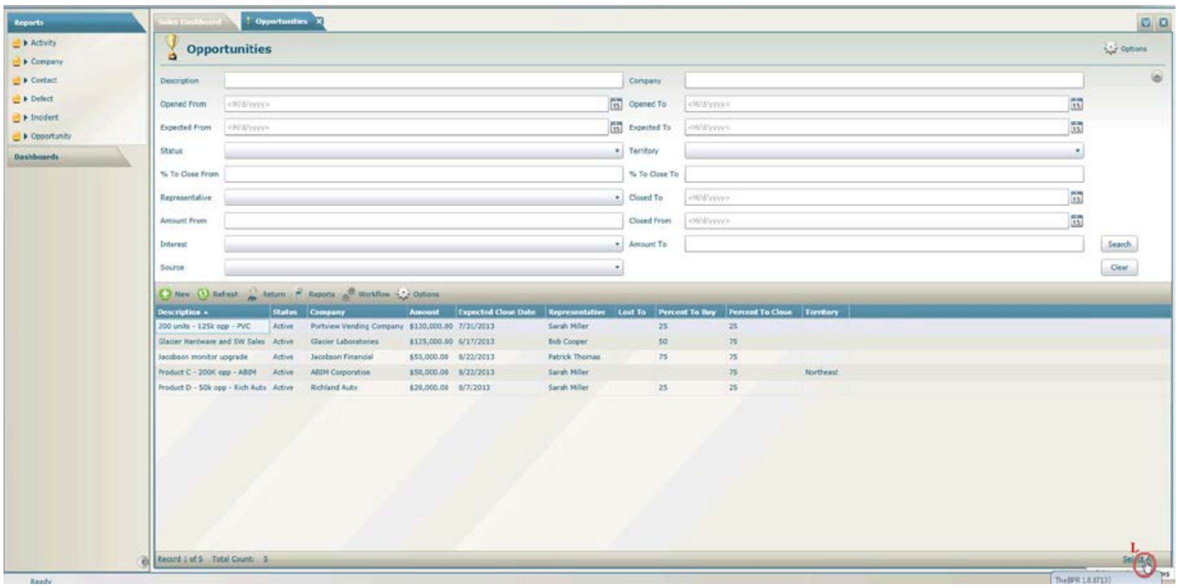
3. Left Click to check the Dashboards you want displayed.

Using the Sales Dashboard

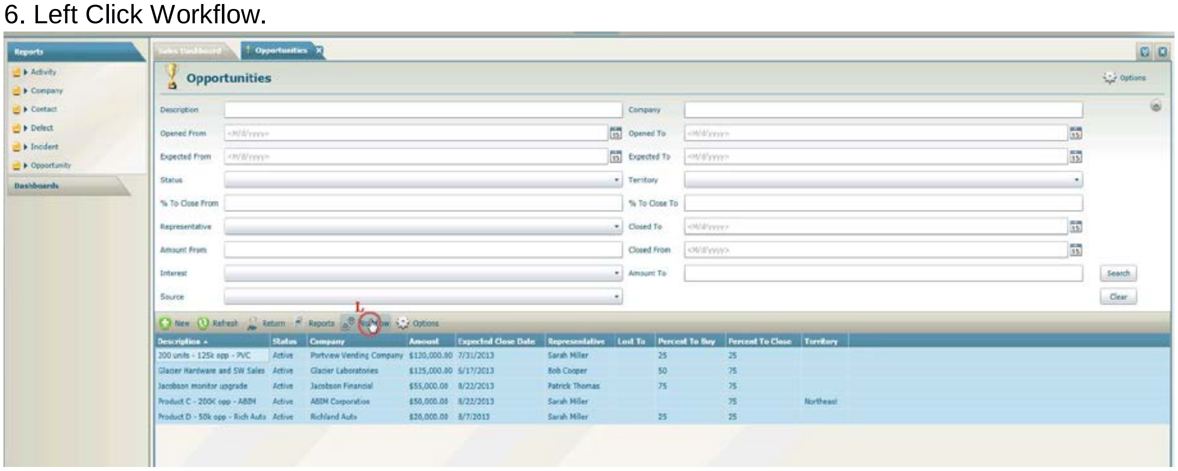
4. The graphs are interactive. Click into any graph element to display the details.



5. We selected the Opportunities currently in the Prospecting stage. You can open any of these records, or select some or all of them to work with. We will select all of them.



6. Left Click Workflow.

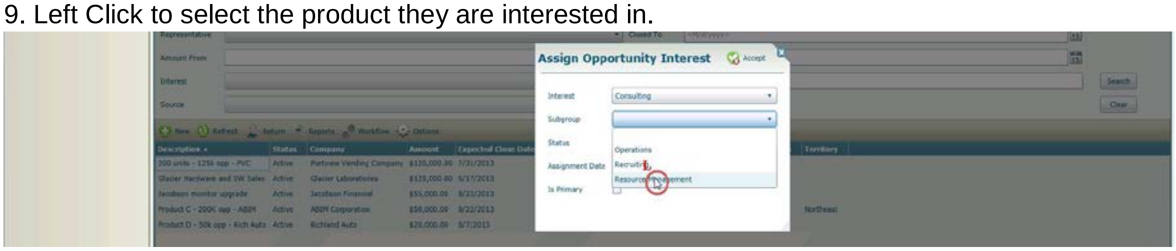


Using the Sales Dashboard

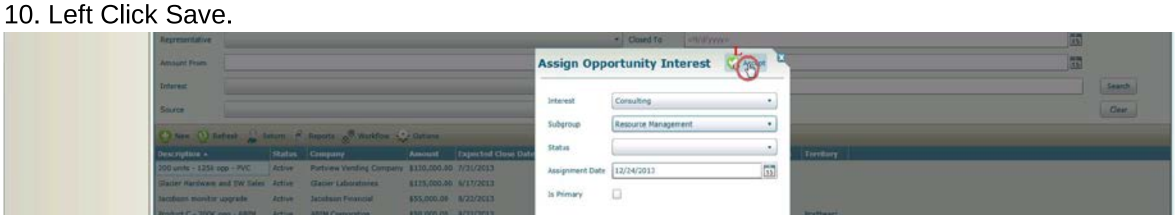
7. You can choose from several options. We will choose to assign a product Interest to each of these Opportunities.

8. Left Click to select the product they are interested in.

9. Left Click to select the product they are interested in.



10. Left Click Save.



11. You have now set each of these Opportunities area of Interest.