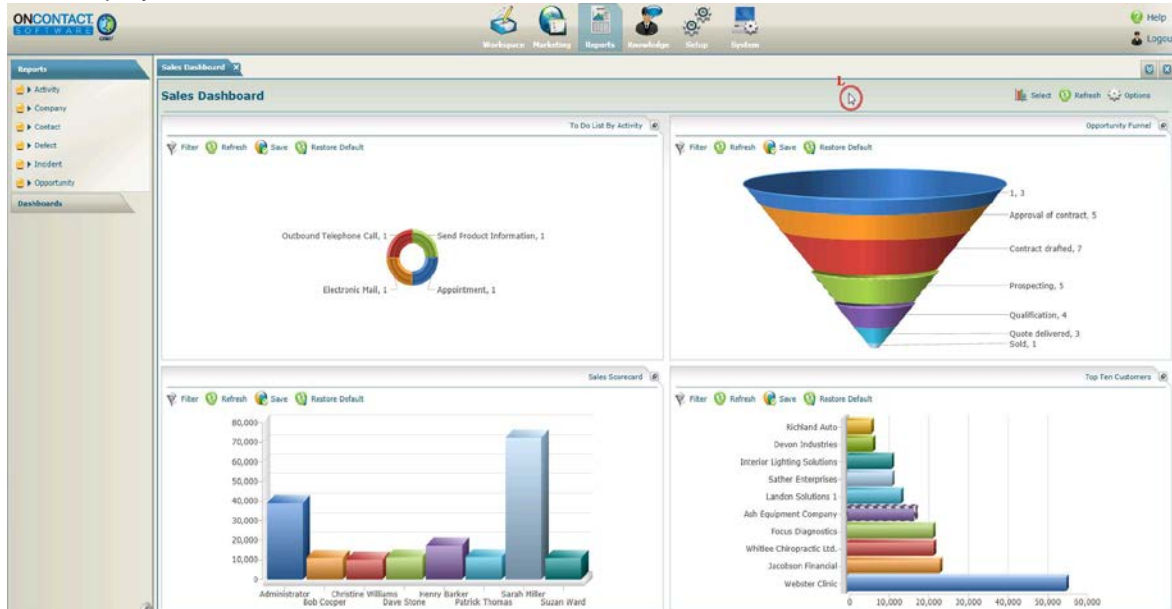


## Using the Sales Dashboard

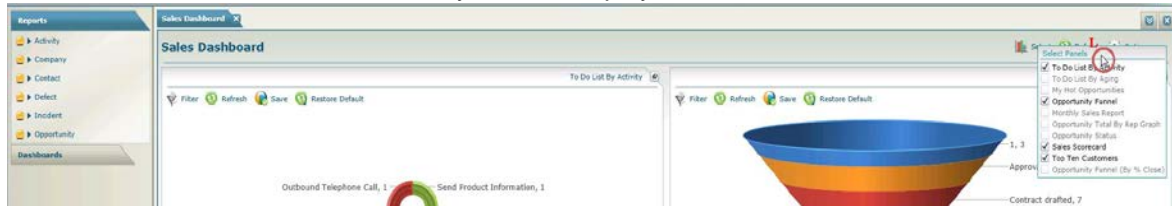
1. The Sales Dashboard displays up to four panels at a time. You can choose the set of panels you want displayed, and set different filters for each of them.



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

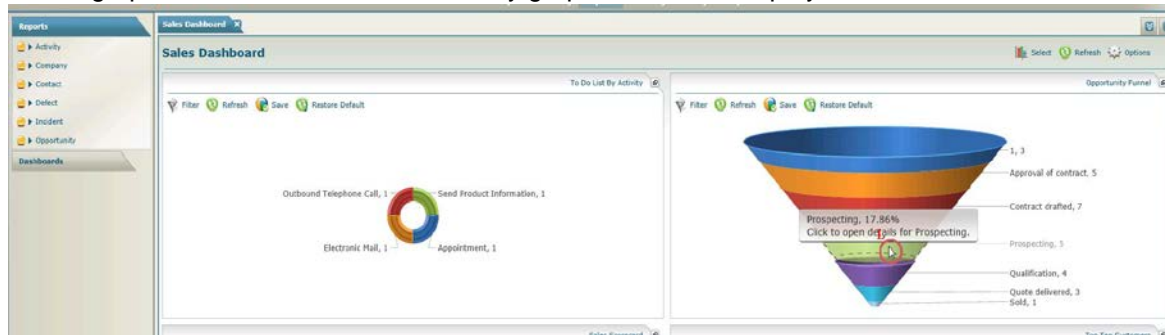


3. Left Click to check the Dashboards you want displayed.



## 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.

The Opportunities view includes search filters for Description, Company, Opened From, Opened To, Expected From, Expected To, Status, Territory, % To Close From, % To Close To, Representative, Closed To, Amount From, Closed From, Interest, Amount To, and Source. Below the filters is a table with the following data:

| Description                     | Status | Company                  | Amount       | Expected Close Date | Representative | Lead To | Percent To Buy | Percent To Close | Territory |
|---------------------------------|--------|--------------------------|--------------|---------------------|----------------|---------|----------------|------------------|-----------|
| 200 units - 125k opp - PVC      | Active | Partview Vending Company | \$120,000.00 | 7/31/2013           | Sarah Miller   | 25      | 25             |                  |           |
| Glacier Hardware and SW Sales   | Active | Glacier Laboratories     | \$125,000.00 | 6/17/2013           | Bob Cooper     | 50      | 75             |                  |           |
| Jacobson monitor upgrade        | Active | Jacobson Financial       | \$55,000.00  | 8/22/2013           | Patrick Thomas | 75      | 75             |                  |           |
| Product C - 200k opp - ABM      | Active | ABM Corporation          | \$50,000.00  | 8/22/2013           | Sarah Miller   |         | 75             |                  | Northeast |
| Product D - 50k opp - Rich Auto | Active | Richland Auto            | \$20,000.00  | 8/7/2013            | Sarah Miller   | 25      | 25             |                  |           |

6. Left Click Workflow.

This screenshot is identical to the previous one, but with a red circle highlighting the 'Workflow' icon in the toolbar above the table.

## Using the Sales Dashboard

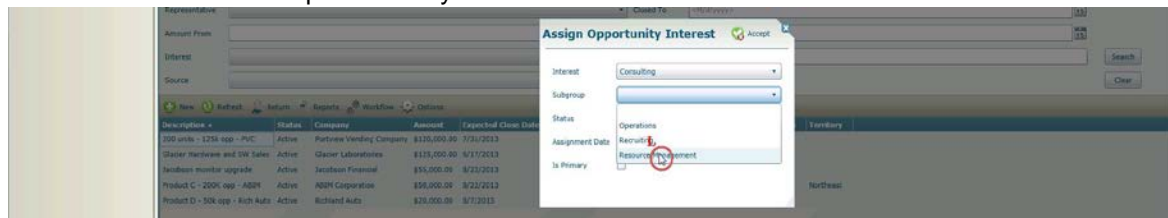
7. You can choose from several options. We will choose to assign a product Interest to each of these Opportunities.



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.

