

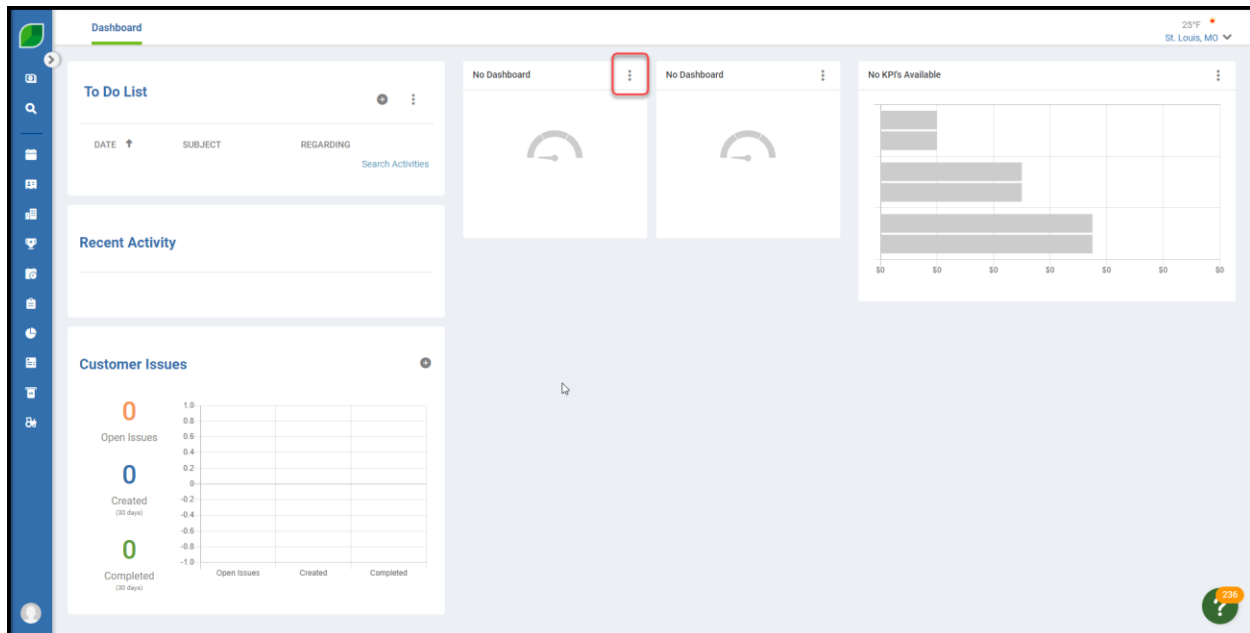
Creating a New Dashboard

Purpose: Dashboards are visual dial representations of lists.

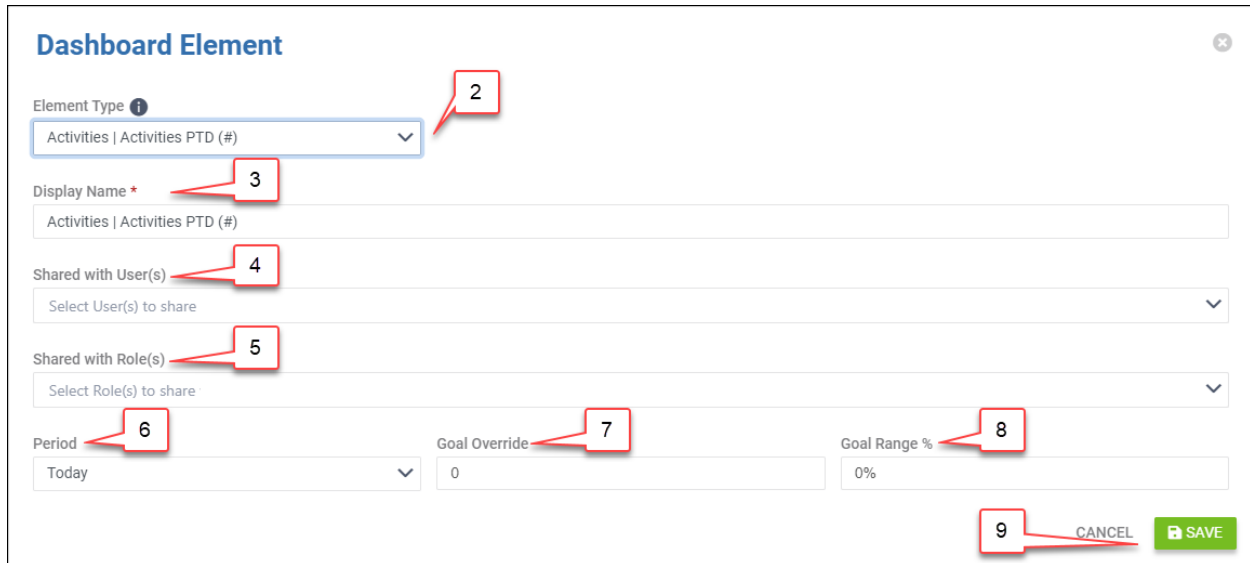
Prerequisites:

1. None

To create a Dashboard, follow these steps:

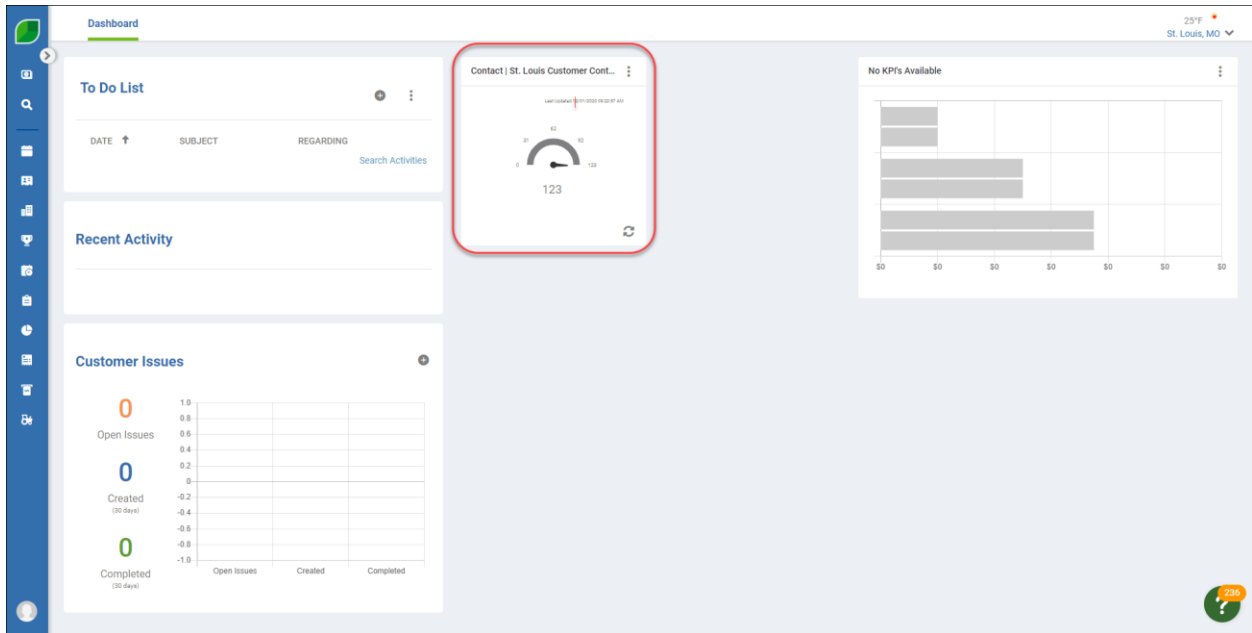


1. Click on the three dots in the Dashboard section on the Home screen.



The screenshot shows a 'Dashboard Element' configuration form. It includes a dropdown for 'Element Type' (1) with the value 'Activities | Activities PTD (#)' (2). A text field for 'Display Name' (3) contains the same text. Two dropdowns for 'Shared with User(s)' (4) and 'Shared with Role(s)' (5) are set to 'Select User(s) to share' and 'Select Role(s) to share' respectively. A 'Period' dropdown (6) is set to 'Today'. A 'Goal Override' text field (7) contains '0'. A 'Goal Range %' text field (8) contains '0%'. At the bottom right, there are 'CANCEL' and 'SAVE' buttons (9).

2. Select the Element Type.
Note: User created lists can be found in Select Advanced Search.
3. Type in a name for the Dashboard.
4. Type in specific users that the dashboard will be shared with
5. Type in specific roles that the dashboard will be shared with
6. Select the period that will be displayed within the dashboard
7. If desired, enter a Goal Override. This should be a desired number based upon the record count. An example might be you set up a dashboard to track monthly sales and the goal override would be the value of expected sales for the month.
8. If desired, enter a Goal Range %. This is a value plus or minus that is acceptable for the goal.
9. Press Save.



10. Clicking on the Dashboard's title will direct the user to the list.