

REFERENCE GUIDE

Dashboards

Making Your Numbers Work For You



A complete setup and reference companion for your dashboard training.

Your Dashboard Out-Of-The-Box

What It Is

A dashboard is a highly customizable, always up to date report on your account's activity, built from widgets that show your numbers at a glance.

How It Works For Your Business

- Every account opens to a default dashboard already built by whoever set up your software, so you have a starting view from day one.
- A dashboard sits in one of two states: with widgets (a full working report) or without widgets (a blank canvas that shows quick-start options to help you begin).
- View Mode is what you see day to day: a list of widgets with filters and a date range you can adjust.
- Edit Mode is a temporary switch (pencil icon) that lets you drag, resize, add, or remove widgets and change the dashboard's theme or title.
- The dashboard selection menu (blue button, top left) is where you search for a dashboard, see your own list, and see any dashboards shared with you.

You're not going to break anything by clicking around. Explore freely as you get comfortable with your out-of-the-box view.

Tips & Guidelines

Tips

- Spend your first few sessions in View Mode getting comfortable with what's already there before touching Edit Mode.
- The "Summarize with AI" option can give you a plain-language overview of what a dashboard is currently showing.
- If your software administrator set your dashboard up, ask them what each widget means before you start changing anything.
- Your selected date range is saved automatically per person, so what you see won't change what a teammate sees.

DO

- Look at your dashboard daily before checking anything else
- Ask what a widget means before assuming
- Get comfortable in View Mode first
- Use the pin feature if you have more than one dashboard

DON'T

- Assume every user's dashboard looks the same
- Feel like you need to memorize every widget on day one
- Worry about breaking something by clicking around
- Skip exploring the quick filters bar

Customize Your Dashboard

What It Is

Depending on your access, you can build your own dashboards from scratch, from a template, or by cloning one that already works, and control who can see or edit each one.

How It Works For Your Business

- If you have admin rights, you can create a new dashboard from the dashboard selection menu with "+ Add Dashboard."
- Three starting points: a blank dashboard, a ready-made template from the library, or a clone of one you already have.
- When creating a dashboard, you choose whether it is private (visible only to you) or shared, and set an access level for each role on your team.
- A blank dashboard opens to quick-start options; you can accept suggested widgets in one click or add each one manually.
- Once widgets are in place, click "Save Changes" to lock in your layout, or "Cancel" to back out without saving.

Tips & Guidelines

Tips

- Start from a template or a clone whenever one is close to what you need. It's faster than building from a blank dashboard.
- Give a new dashboard a clear, specific name (like "Sales Overview") so it's easy to find later.
- Decide who needs to see a dashboard before you build it. It's easier to set sharing up front than to change it later.
- Not every plan includes custom dashboards. If you don't see the option, check with your software provider.

DO

- Name dashboards clearly and specifically
- Choose private vs. shared before you build
- Use a template when one exists
- Confirm before saving so you don't lose your layout

DON'T

- Build every dashboard completely from scratch
- Leave a dashboard set to "shared" by accident
- Rename a dashboard your team already relies on without a heads up
- Forget to click Save Changes when you're done editing

Filters, Dates and Your Numbers

What It Is

The date picker and quick filters control what time period and what data your numbers reflect, so the same dashboard can answer different questions just by adjusting them.

How It Works For Your Business

- The date picker (top of the dashboard) sets the time range for every widget on that dashboard, and it saves per person so it reopens where you left it.
- You can also set a comparison date range, so widgets show a trend (like up 12% vs. last week) alongside the raw number.
- Quick Filters (up to five) let you filter the whole dashboard by fields across your data, like status, pipeline, or source, without editing every widget one by one.
- Filter pills use logic like "is," "is not," "is one of," or "is empty" to narrow results exactly the way you need.
- If a widget has its own comparison range set, that widget-level setting overrides the dashboard-level one.

Tips & Guidelines

Tips

- Set your comparison range first. It's what turns a flat number into a trend you can act on.
- Use Quick Filters when several widgets need the same filter, instead of setting the same condition over and over.
- If a saved filter's option disappears (like a deleted pipeline), the system automatically picks the first available option, so double check it still makes sense.
- Clear filters between unrelated questions so you don't accidentally view a report through the wrong lens.

DO

- Set a comparison range so numbers show trend, not just a snapshot
- Use Quick Filters for anything that applies dashboard-wide
- Re-check filters after a deleted pipeline or stage
- Clear filters when you're done with a specific question

DON'T

- Assume a filter carries over correctly forever
- Stack more filter groups than you can explain to a teammate
- Forget your date range is per-person, not shared
- Leave a comparison range set on a widget that doesn't need one

Dashboard Widget Types

What It Is

A widget is a small, focused report; your software groups them into categories (Contacts, Appointments, Opportunity, Visitor Data, Emails, Calls, Conversations, and General) so you can find the right one fast.

How It Works For Your Business

- Each category holds widgets built around one kind of data, like contact counts by tag, appointment show/no-show rates, or opportunity value by stage.
- Every widget can be displayed as one of six chart types: Numeric, Donut, Line, Bar, Horizontal Bar, or Table, whichever tells the story clearest.
- Underneath the chart, a widget calculates its number using one of five aggregations: Sum, Min, Max, Average, or Count.
- General widgets cover cross-cutting reports like Lead Source, Sales Efficiency, and ad performance from connected platforms.
- Elements (titles, text boxes, and images) can be added alongside widgets to organize a dashboard into labeled sections.

Tips & Guidelines

Tips

- Start from the category that matches the question you're asking (want to know about deals? Start in Opportunity), then pick the chart type.
- A Table widget is the best choice when you need to see the detail behind a number, not just the number itself.
- Use elements like section titles to group related widgets, especially on a dashboard with many widgets.
- Not every category will apply to every business; skip the ones (like Visitor Data) that don't match what you actually use.

DO

- Match the chart type to the story you're telling
- Use Table widgets when detail matters more than a single number
- Group related widgets with a titled section
- Explore each category once to see what's available

DON'T

- Add a widget just because it exists
- Default to Numeric for everything without considering a chart
- Ignore categories that don't apply to your business
- Overcrowd one dashboard with every widget type at once

Create and Add Dashboard Widgets

What It Is

Adding a widget is a guided, several-step process: pick a category and chart type, configure what it measures, apply any filters, then save it to your layout.

How It Works For Your Business

- Click "+ Add Widget" (or the pencil icon to enter Edit Mode first) to open the widget panel.
- Browse by category or search by keyword to find the right widget, then choose the chart type that fits.
- In Configure, you can rename the widget and choose the metric or metrics it should track.
- Switch to Conditions to filter the widget's data. Use "+AND" to narrow within one group, or start a new group for an "or" condition.
- Click Save to add it to the dashboard, then drag, resize, and reposition it before clicking Save Changes to lock the layout.

Tips & Guidelines

Tips

- Give every widget you add a clear title. The default name isn't always self-explanatory to a teammate.
- Build one filter group at a time and check the results before adding more conditions.
- If a widget can't be saved, it usually means a filter isn't matching any of your data. Adjust or remove it.
- Resize widgets after adding them. A number that matters deserves more visual space than a minor one.

DO

- Rename every widget with a clear title
- Test filters one group at a time
- Resize your most important widgets larger
- Save your layout with Save Changes when you're finished

DON'T

- Leave default widget names in place
- Stack unrelated conditions into one filter group
- Ignore a "can't be saved" warning
- Forget to click Save Changes after rearranging

Customize Dashboard Widgets

What It Is

Every widget you've already added can be reopened and adjusted anytime, its title, its metric, its filters, even its chart type, without needing to delete and rebuild it.

How It Works For Your Business

- Click into an existing widget to reopen its settings, then choose Configure to adjust title, metrics, grouping, or date range.
- "Group" and "View By" control how a chart breaks the data down, useful for Donut or Line charts that compare categories.
- A widget's date range can override the dashboard's overall date range when that widget needs its own time frame.
- Under Conditions, nested filter groups support "or" logic. The same field, like a lead source, can even be used twice across two groups.
- Linked filters (like pipeline and stage) will show a warning if the combination doesn't make sense together, so you can fix it before saving.

Tips & Guidelines

Tips

- Revisit your widgets periodically. What mattered last quarter may not be what matters now.
- Use a widget-level date range override sparingly, only when that one widget genuinely needs a different window than the rest of the dashboard.
- Pay attention to linked filter warnings. They're catching a real conflict, not just being cautious.
- If no data matches a filter, the widget won't save. Loosen the filter rather than leaving it broken.

DO

- Revisit and refresh widgets as your needs change
- Use date overrides only when truly necessary
- Resolve linked-filter warnings before saving
- Adjust chart type if the current one isn't telling the story

DON'T

- Set every widget to override the dashboard date range
- Ignore a linked-filter warning
- Leave a widget broken because a filter matches nothing
- Assume a widget's settings are fixed once you've added it

Create and Manage Multiple Dashboards

What It Is

Most businesses need more than one dashboard, one for sales, one for marketing, one for finance, and your software makes it easy to create, organize, and jump between them.

How It Works For Your Business

- Create a dedicated dashboard for each team or purpose from the dashboard selection menu's "+ Add Dashboard" button.
- Clone an existing dashboard when a new one should start close to a version you already have, then adjust from there.
- Pin your most-used dashboards (pushpin icon) so they always sit at the top of your list instead of sorted alphabetically.
- Set one dashboard as the default, so it's the first thing anyone sees when they open the software.
- If you manage more than one account, a dashboard can even be duplicated to another one entirely.

Tips & Guidelines

Tips

- Pin the two or three dashboards you check daily. It saves real time over the course of a week.
- Clone before you customize; it's faster than starting from a blank dashboard every time.
- Choose your default dashboard carefully. It should work well for everyone who logs in, not just you.
- Give each dashboard a distinct purpose. If two dashboards start looking the same, consider merging them.

DO

- Pin the dashboards you check most
- Clone instead of rebuilding from scratch
- Choose a default dashboard that works for the whole team
- Give each dashboard a clear, distinct purpose

DON'T

- Let unused dashboards pile up unpinned and forgotten
- Set a highly personal dashboard as the shared default
- Build near-duplicate dashboards that could be one
- Forget to rename a clone before it goes live

Dashboard Permissions and Sharing

What It Is

Every dashboard can be private to its creator or shared at one of several access levels, so the right people see the right numbers, and nothing more.

How It Works For Your Business

- Four permission levels: Full (create, edit, share, delete), Edit (change widgets, can't delete), View (read-only), and No Access (can't see it at all).
- Only the dashboard's owner, or someone with Full access, can change its permissions or set it as the default.
- Permissions follow a hierarchy: higher-level roles can't be given less access than a lower-level role holds, and lowering a higher role automatically lowers the roles beneath it.
- A private dashboard is visible only to its owner; even administrators can't see it unless it's shared.
- The Export Data permission separately controls whether a given user can download the raw numbers behind a widget.

Tips & Guidelines

Tips

- Set permissions when you create a dashboard rather than after it's already in use. It avoids confusion later.
- Use View access for anyone who just needs the numbers, and save Edit or Full for people who should be changing the layout.
- Keep truly personal dashboards private rather than sharing them and hoping no one edits them.
- If someone shouldn't be able to export data, check that setting separately. It isn't automatic based on their view/edit access.

DO

- Set sharing and permissions at creation
- Give View access to anyone who just needs to read the numbers
- Keep personal dashboards private
- Review who has Full access periodically

DON'T

- Hand out Full access by default
- Assume a private dashboard is visible to admins
- Forget to check export permissions separately
- Change permissions without telling the people affected

Dashboard Themes, Templates and Custom Values

What It Is

Beyond widgets and filters, a dashboard can be visually branded with a theme, saved as a reusable template, and personalized per viewer with custom values, tokens that swap in the right business details automatically.

How It Works For Your Business

- In Edit Mode, the Themes tab lets you choose a predefined theme or build a custom one: background color, text color, and widget styles.
- Individual widgets can carry their own theme, separate from the dashboard's overall look, when a section needs to stand out.
- A dashboard template saves an existing dashboard's layout so it can be recreated quickly elsewhere, useful when the same report structure serves multiple teams or accounts.
- Custom values are tokens like business name or address that automatically resolve to the right detail depending on who's viewing, so one dashboard design can serve many accounts.
- Custom values can be inserted into a widget's filter conditions, or into title and text elements, wherever you see the {} button next to a field.

Tips & Guidelines

Tips

- Save a dashboard as a template as soon as you know you'll need that same layout again elsewhere. It's far faster than rebuilding.
- Keep a theme simple and legible. A dashboard is a working tool first, a design piece second.
- Fill in the underlying business or personal details behind a custom value, or it will simply show up blank to the viewer.
- Use custom values any time the same dashboard design needs to feel personal to more than one person or account.

DO

- Save reusable layouts as templates
- Keep themes clean and easy to read at a glance
- Fill in the details behind any custom value you use
- Test a custom value from a different account's view before rolling it out

DON'T

- Over-design a dashboard at the expense of readability
- Reuse a token without confirming its value is filled in
- Forget that only editors, not viewers, can insert custom values
- Recreate the same layout by hand when a template would do it in seconds

Advanced Metrics, Custom Fields and Trend Reporting

What It Is

Beyond the built-in numbers, your software lets you turn your own custom data, and the direction it moves, into meaningful metrics: a way to measure what matters specifically to your business.

How It Works For Your Business

- Any Number or Monetary custom field on a contact or opportunity can become a metric, calculated as a Sum, Minimum, Maximum, or Average.
- The same custom field can answer several different questions just by changing the aggregation, filtering, or grouping applied to it.
- Every widget with a number shows a small trend badge (an arrow and a percentage) comparing it to a prior period; by default, up is shown as good and down as bad.
- You can flip that logic per metric, so a number where lower is genuinely better (like cost per lead) turns green when it drops, not red.
- Custom metrics can also combine more than one metric into a single formula, useful for calculated KPIs that go beyond a single field.

Tips & Guidelines

Tips

- Set up a custom field metric any time your business tracks a number that doesn't fit a built-in field, like property value or project cost.
- Always check whether "increase is positive" or "decrease is positive" actually fits the metric you're looking at.
- Remember, a custom field metric and a built-in value that looks similar (like a custom Monetary field and standard Opportunity value) are two separate things.
- Use custom metrics sparingly, for the KPIs that genuinely need a formula, not as a replacement for simple widgets.

DO

- Turn business-specific numbers into custom field metrics
- Set the correct direction for each metric's trend badge
- Keep custom vs. built-in values straight in your head
- Reserve custom metric formulas for real calculated KPIs

DON'T

- Assume every metric should show green when it goes up
- Duplicate a custom field just to calculate it differently
- Confuse a custom Monetary field with a built-in value field
- Build an overly complex formula when a simple widget would do

Key Terms Glossary

Dashboard

A customizable, always up to date report on your account's activity, built from widgets.

Widget

A small, focused report that shows one piece of data as a chart, number, or table.

View Mode

The everyday view of a dashboard: widgets, filters, and a date range you can adjust.

Edit Mode

The temporary mode for adding, removing, resizing, or rearranging widgets.

Quick Filters

Up to five saved filters that apply across an entire dashboard at once.

Comparison Date Range

A second time period a widget's number is measured against to show a trend.

Aggregation

The calculation (Sum, Min, Max, Average, Count) a widget applies to its data.

Chart Type

How a widget's data is displayed: Numeric, Donut, Line, Bar, Horizontal Bar, or Table.

Permission Level

How much access someone has to a dashboard: Full, Edit, View, or No Access.

Private Dashboard

A dashboard visible only to the person who created it.

Default Dashboard

The dashboard everyone sees first when they open the software.

Dashboard Template

A saved copy of a dashboard's layout, ready to recreate elsewhere.

Custom Value

A token that automatically fills in the right detail (like a business name) for whoever is viewing.

Trend Badge

The small arrow and percentage next to a number, showing whether it's moving up or down.

Custom Field Metric

A business-specific number field turned into a measurable metric.

Custom Metric

A formula that combines more than one metric into a single calculated KPI.

Your Dashboard Rhythm & Getting Help

1

Check It Daily

Start each day with a quick look at your key numbers before diving into the details.

2

Adjust Your Filters

Set the date range and filters that match the question you're asking today.

3

Build As You Grow

Add or customize widgets and dashboards as your business needs change.

4

Ask For Help

Reach out to whoever set up your software if a number doesn't look right.

Your dashboard only works as well as the numbers you look at it for. Check it, adjust it, and let it grow with your business.

Getting Help

- Keep this guide close as you work through the course, and come back to it anytime you need a refresher.
- Remember, you're not going to break anything. Explore, click around, and give yourself a little time each day.
- If you have questions your software administrator can't answer, reach out to your support team for help.