

Basic terminology

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Basic terminology

The Dashboard is the signed-in home surface where PAMS presents dashboard views and business readouts.

If you need to...	Go to
understand the dashboard terms	Read the dashboard terms
check what you need before opening the dashboard	Before you start
understand a message or an unavailable choice	Messages and unavailable choices
learn the wider dashboard surface	Dashboard overview
change your dashboard workspace	Personalizing your workspace
open navigation guidance	Navigation basics
get help with a dashboard you cannot access	Getting help
understand principal-specific reporting	Principals Report

What these terms mean

When your role has no dashboard, PAMS displays the message `Your role has no dashboard` and the guidance `Kindly, Contact your administrator to define a dashboard`.

Before you start

Sign in before you open the dashboard. PAMS protects this surface with an authentication requirement, so a signed-in session is needed before you use the dashboard terminology. After signing in, continue with the dashboard labels below.

Read the dashboard terms

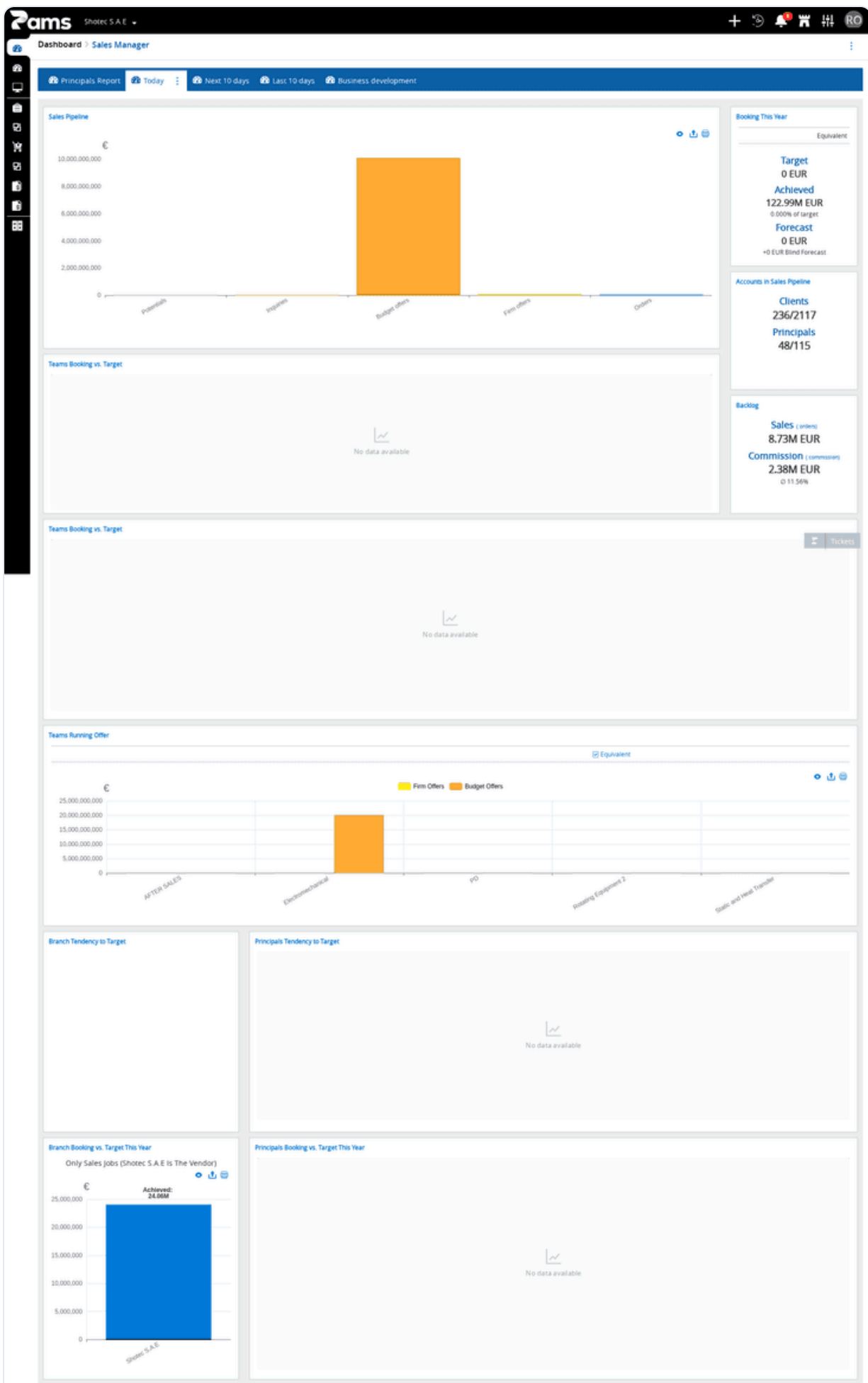
The dashboard combines named views, result-order controls, and business readouts.

The

following labels help you identify what you are looking at:

Label	What it identifies
Sales Pipeline	A dashboard readout.
Accounts in Sales Pipeline	A dashboard readout.
Teams Booking vs. Target	A dashboard readout.
Booking This Year	A dashboard readout.
Equivalent	A dashboard value label.
Target	A dashboard value label.
Achieved	A dashboard value label.
Forecast	A dashboard value label.

The dashboard also includes the labels **Potentials**, **Inquiries**, **Budget offers**, **Firm offers**, and **Orders**. Use the labels visible in your dashboard to orient yourself among the displayed readouts.





New Tab is the field label used when a dashboard tab is added or renamed. The field is required in those tab dialogs.

Use one of the following controls to choose the order of the principal results.

Prerequisites

The principal results are visible.

Steps

1. Choose one result order.

If you need to...	Select
order the results by booking	Sort by Booking
order the results by target	Sort by Target
order the results by achievement	Sort by Achievement

Result: The principal results are ordered by the criterion you selected.

The arrival view showed three named controls and five additional visible controls.

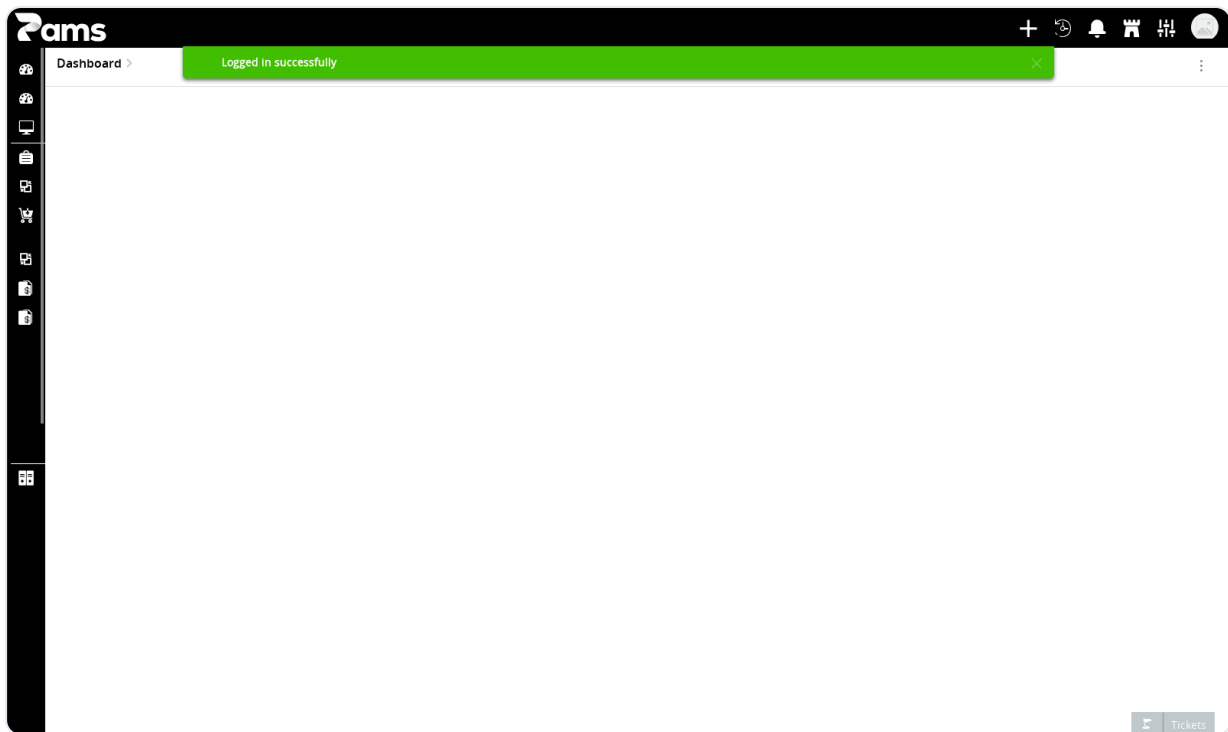
None of

the three named controls carried a required marker, and no table headers appeared.

Messages and unavailable choices

The home surface presents the dashboard terms above. **Global view** and **Single view** do

not appear as available choices. Use the views and readouts that are visible on your dashboard.



When dashboard actions produce messages, use the wording below to identify the outcome:

Situation	Message	What to do
The dashboard service reports success	Your request was completed successfully	Continue with the dashboard result.
The active-dashboard change reports an error	An error occurred while processing your request	Check the active dashboard selection and repeat the change.
Your role has no dashboard	Your role has no dashboard	Contact your administrator to define a dashboard.
The dashboard gives the empty-dashboard guidance	Kindly, Contact your administrator to define a dashboard	Contact your administrator to define a dashboard.

The message `Please choose one or more principals` belongs to [Principals Report](#), not to the home terminology surface.

The arrival view showed no dialog or message. The available home surface is therefore the place to read the dashboard labels and choose among the visible result-order controls.

Result: You can identify the Dashboard terms, recognize the available ordering controls,
and distinguish home messages from the principal-report message.