

Dashboard settings

September 10, 2026

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Dashboard settings at a glance

Dashboard settings is the configuration list for role dashboards. A role dashboard is the set of tabs and widgets assigned to a role. A dashboard setting is the configuration entry you maintain for that role dashboard. Use the list to review its users and last modification time, or open

Forecast settings, the surface for reviewing forecast rules. The page leads to the dashboard-setting creation and editing pages.

If you need to...	Go to
Review the role dashboards and their columns	Understand the dashboard settings list
Find a role dashboard and open its setting	Find and open a dashboard setting
Review forecast-rule fields	Open forecast settings
Create a dashboard setting	New dashboard setting
Edit and save an existing dashboard setting	Edit dashboard setting
Use a configured dashboard	Dashboard overview

Before you begin

Prerequisites

- You can open the authenticated configuration routes for the list, new setting, and edit setting.
- Your subscription includes the dashboard-setting feature. When it does not, the page takes the subscription-upgrade branch instead of showing the dashboard list.

- The dashboard list is available before you open **Forecast settings**.

Use the list, new-setting page, and edit page for these three configuration tasks.

Find and open a dashboard setting

Use a dashboard setting when you need to review or hand off maintenance for one role dashboard.

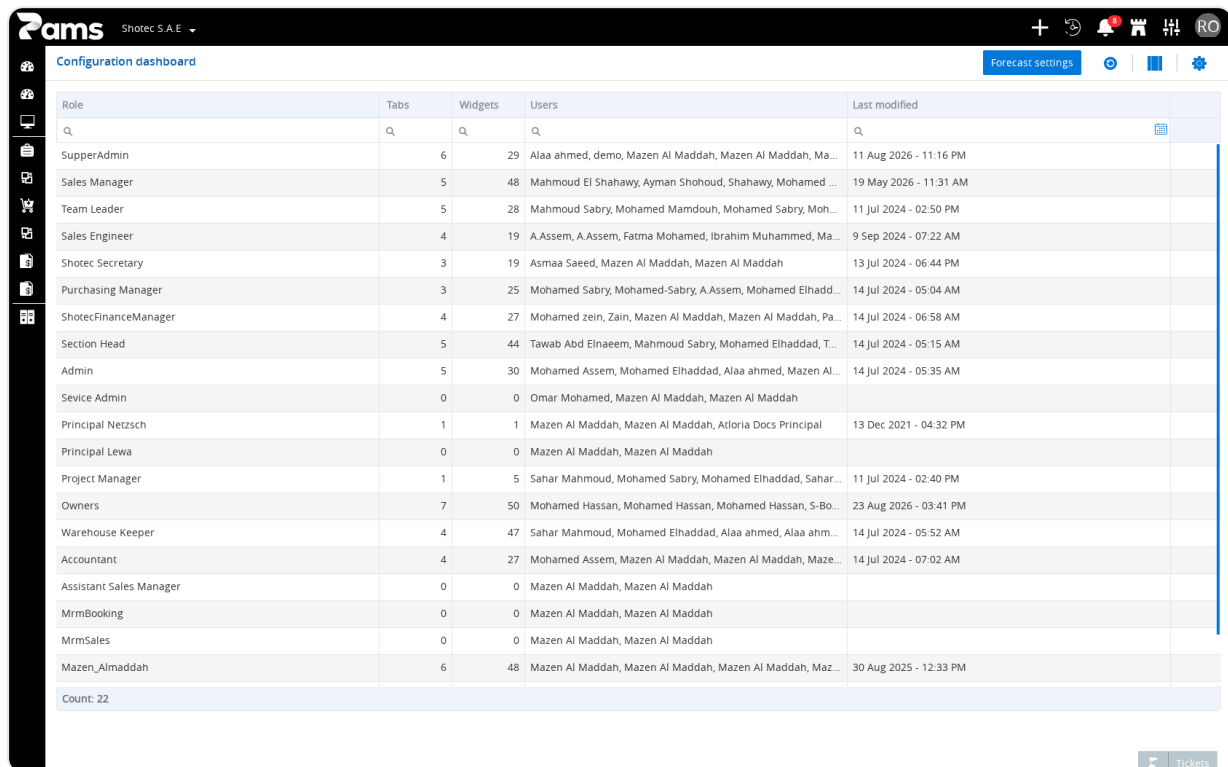
Prerequisites

- You can open the configuration area.
- The dashboard-setting list is available.

Steps

1. Open the configuration menu.
2. Select **Dashboard settings**.
3. Use the list headers to identify the role dashboard you need.
4. Select the dashboard row to open its setting.

Result: The selected dashboard setting opens on the edit page.



Role	Tabs	Widgets	Users	Last modified
SupperAdmin	6	29	Alaa ahmed, demo, Mazen Al Maddah, Mazen Al Maddah, Ma...	11 Aug 2026 - 11:16 PM
Sales Manager	5	48	Mahmoud El Shahawy, Ayman Shohoud, Shahawy, Mohamed ...	19 May 2026 - 11:31 AM
Team Leader	5	28	Mahmoud Sabry, Mohamed Mamdough, Mohamed Sabry, Moh...	11 Jul 2024 - 02:50 PM
Sales Engineer	4	19	A.Assem, A.Assem, Fatma Mohamed, Ibrahim Muhammed, Ma...	9 Sep 2024 - 07:22 AM
Shotec Secretary	3	19	Asmaa Saeed, Mazen Al Maddah, Mazen Al Maddah	13 Jul 2024 - 06:44 PM
Purchasing Manager	3	25	Mohamed Sabry, Mohamed-Sabry, A.Assem, Mohamed Elhadd...	14 Jul 2024 - 05:04 AM
ShotecFinanceManager	4	27	Mohamed zein, Zain, Mazen Al Maddah, Mazen Al Maddah, Pa...	14 Jul 2024 - 06:58 AM
Section Head	5	44	Tawab Abd Elnaeem, Mahmoud Sabry, Mohamed Elhaddad, T...	14 Jul 2024 - 05:15 AM
Admin	5	30	Mohamed Assem, Mohamed Elhaddad, Alaa ahmed, Mazen Al...	14 Jul 2024 - 05:35 AM
Service Admin	0	0	Omar Mohamed, Mazen Al Maddah, Mazen Al Maddah	
Principal Netzs	1	1	Mazen Al Maddah, Mazen Al Maddah, Atloria Docs Principal	13 Dec 2021 - 04:32 PM
Principal Lewa	0	0	Mazen Al Maddah, Mazen Al Maddah	
Project Manager	1	5	Sahar Mahmoud, Mohamed Sabry, Mohamed Elhaddad, Sahar...	11 Jul 2024 - 02:40 PM
Owners	7	50	Mohamed Hassan, Mohamed Hassan, Mohamed Hassan, S-Bo...	23 Aug 2026 - 03:41 PM
Warehouse Keeper	4	47	Sahar Mahmoud, Mohamed Elhaddad, Alaa ahmed, Alaa ahm...	14 Jul 2024 - 05:52 AM
Accountant	4	27	Mohamed Assem, Mazen Al Maddah, Mazen Al Maddah, Maze...	14 Jul 2024 - 07:02 AM
Assistant Sales Manager	0	0	Mazen Al Maddah, Mazen Al Maddah	
MrmBooking	0	0	Mazen Al Maddah, Mazen Al Maddah	
MrmSales	0	0	Mazen Al Maddah, Mazen Al Maddah	
Mazen_Almaddah	6	48	Mazen Al Maddah, Mazen Al Maddah, Mazen Al Maddah, Maz...	30 Aug 2025 - 12:33 PM

Count: 22

Understand the dashboard settings list

The dashboard settings list summarizes each role dashboard in one row. Read the headers from left to right when you compare role dashboards.

Header	What the list gives you	Type
Role	The role dashboard name	Text
Tabs	The number of tabs	Number
Widgets	The number of widgets	Number
Users	The users associated with the role dashboard	Text
Last modified	The last modification time	Date

The list actions include **Apply filter**, **Refresh**, **Table Layout**, and **Settings**. Use the grid and its five headers to compare role dashboards.

Selecting a data row opens the dashboard-setting editor. To review forecast rules, select

Forecast settings.

Open forecast settings

Use **Forecast settings** to review the calculation basis, tolerated deviation, average-booking basis, or the two payment-period values.

Prerequisites

- The dashboard settings list is visible.
- The dashboard-setting feature is included in your subscription.

Steps

1. Select **Forecast settings**.
2. Review the forecast-rule fields in the popup.

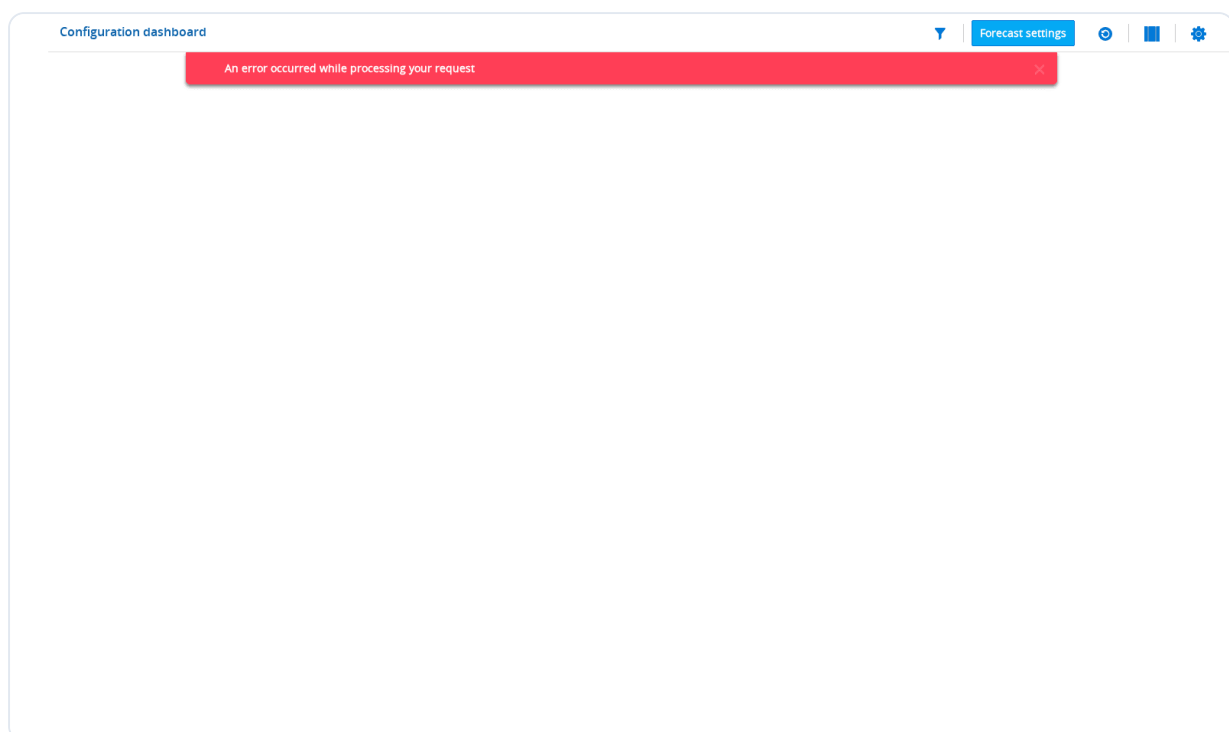
Field	Type	Required rule	Limits or condition
Forecast calculation type	Text/radio choice	Not required by the extracted rule	The popup must be open
Forecast calculation method	Text/radio choice	Not required by the extracted rule	The popup must be open

Field	Type	Required rule	Limits or condition
Tolerated deviation between forecasted and achieved monthly booking	Number	Not required by the extracted rule	From 0 to 100
Listing of the average monthly booking	Text/radio choice	Required	Minimum 0
Average Period For Goods Delivery Till Receiving The Commission Payment	Number	Required	Minimum 0
Average Period For Goods Delivery Till Receiving The Clients Payment	Number	Required	Minimum 0

The forecast-settings action is available when the dashboard-setting subscription is included.

If the fields do not appear, return to the list before continuing.

Result: The forecast-rule fields are ready for review when the popup opens.



When a dashboard setting is unavailable

Use the message and condition that matches what you see. The dashboard settings page has separate branches for subscription access, popup access, runtime report content, and actions

owned by the
dashboard-setting editor.

What you see	What it means	What to do
The dashboard list is replaced by the subscription-upgrade surface	The dashboard-setting feature is not included in the subscription branch	Ask your administrator about the subscription or use the available upgrade route.
Forecast fields do not appear after selecting Forecast settings	The forecast settings surface is unavailable	Return to the list before continuing.
No import choices appear after Import From	—	Return to the list.
Runtime report columns differ from one setup to another	The principal-report column sets come from the dashboard setup	Work from the headers visible in your report rather than assuming a fixed column list.
An icon-only action has no reader-facing label	The action label is not available on this surface	Use the labelled dashboard-setting procedures linked below.

The following messages are the exact strings associated with this page's actions:

Situation	Message
A successful request message	Your request was completed successfully
A common error message	An error occurred while processing your request
A duplicate tab message	You already have this tab in this dashboard
A principal-selection message	Please choose one or more principals

If this message appears, return to the list and use the relevant maintenance page.

Continue to dashboard maintenance

Dashboard maintenance changes the tabs, widgets, and report surfaces associated with a role dashboard. This page hands those jobs to their dedicated procedures.

If you need to...	Continue with...
Create a dashboard setting and add its tabs	New dashboard setting
Edit and save an existing dashboard setting	Edit dashboard setting

If you need to...	Continue with...
Use the configured dashboard	Dashboard overview

The details surface showed **Widget**, **Tab**, **Save**, and **Save and Close**. It also exposed these controls:

Control	Surface
Blank Tab	Tab menu
Principals Report	Tab menu
Eagle View	Tab menu
Highlight	Eagle View
Interval	Eagle View
New Tab	Tab popup

Use the linked maintenance pages for the procedures these controls begin.

1. Select **Eagle View**.

Result: The surface shows vendor-analysis settings with **Over**, **Highlight**, and **Interval**.

