PAMS FRESH GENERATION

Dashboard

September 10, 2026

Dashboard

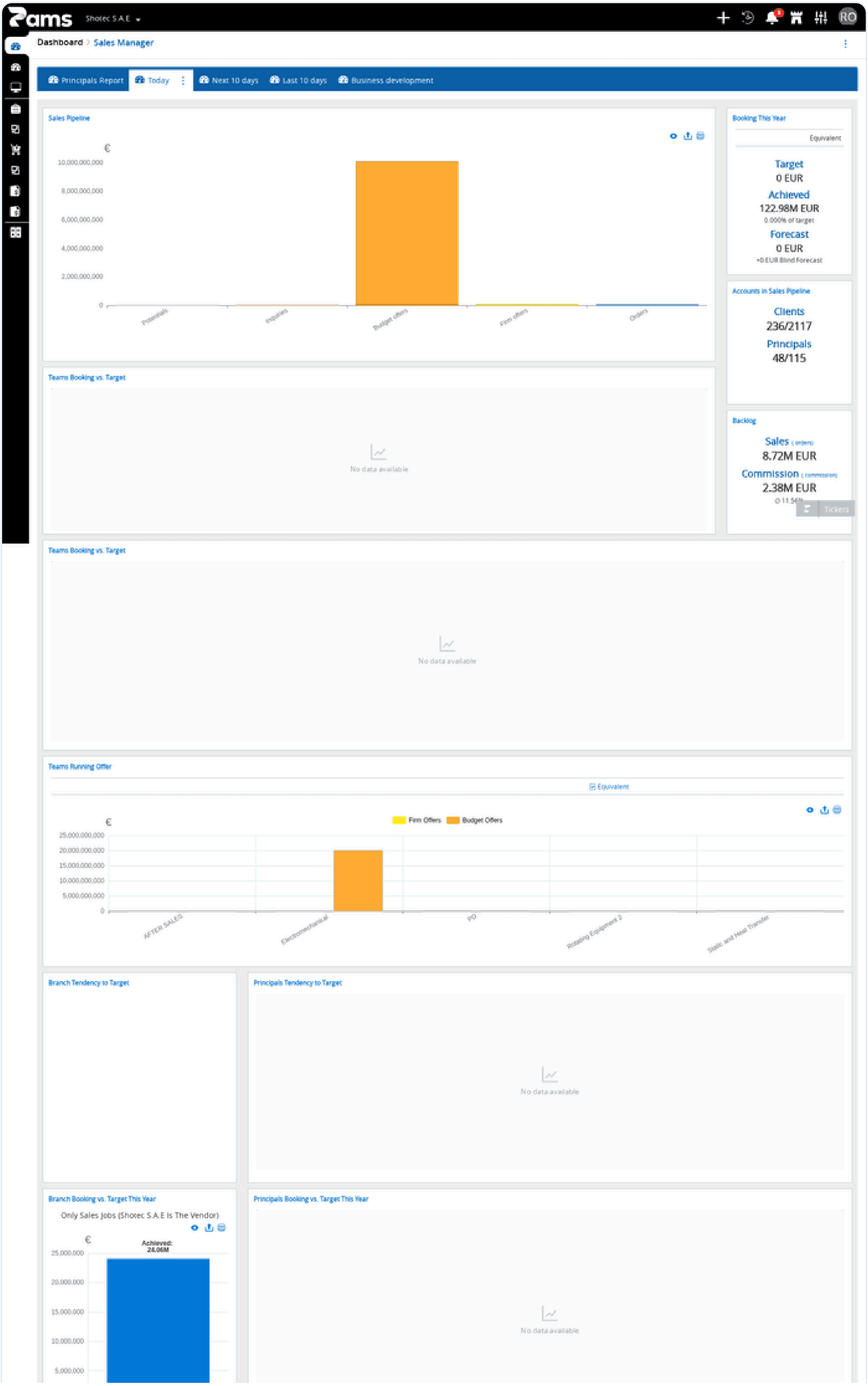
What the Dashboard is

The Dashboard is a set of role-based tabs that presents the cards and charts chosen for your
work. Use it to review operational measures such as sales, backlog, pipeline and status, or to
review finance and management measures without opening each underlying record.

The widget gallery contains 109 dashboard components. A component can present a card, chart,
ranking, status, trend or management measure. The tabs divide those measures into separate views;
the available tabs depend on your role and saved dashboard setup.

If you need to…	Go to
Review the measures on your role's dashboard	Open the Dashboard
Read cards, charts and sorting controls	Read dashboard content
Find a card or chart already on a tab	Find widgets and continue to customization
Review the principal report variant	Use the dashboard variants
Understand an empty dashboard	When the Dashboard is unavailable
Build or customize tabs and widgets	Dashboard settings
Review the widget gallery by business question	Dashboard widget catalog
Review operational sales and backlog measures	Sales and backlog widgets
Review pipeline and status measures	Pipeline and status widgets
Review finance and management-report cards	Management report widgets

The principal-dashboard role variant can include **Principals Report**. The dashboard library also
defines **Eagle View** as a separate dashboard tab. The names and available surfaces come from the
dashboard assigned to your role.


Dashboard > Sales Manager
Principals Report
Today
Next 10 days
Last 10 days
Business development
Sales Pipeline
Booking This Year
Target
0 EUR
Achieved
122.98M EUR
Forecast
0 EUR
Accounts in Sales Pipeline
Clients
236/2117
Principals
48/115
Backlog
Sales
8.72M EUR
Commission
2.38M EUR
Teams Booking vs. Target
No data available
Teams Running Offer
Firm Offers
Budget Offers
Branch Tendency to Target
Principals Tendency to Target
Branch Booking vs. Target This Year
Only Sales Jobs (Shotec S.A.E Is The Vendor)
Principals Booking vs. Target This Year

Before you start

The Dashboard opens the saved dashboard assigned to your role. Your role and subscription determine
which tabs and widget surfaces are available, so the view can differ between roles.

Before you start	Why it matters
Sign in with a role that has a dashboard assigned	The shell loads the role's saved tabs and widgets.
Confirm that the required dashboard feature is available to your role	A widget checks the feature subscription before showing its report surface.
Know whether you are reviewing or changing the dashboard	Reviewing the Dashboard does not require a data change; building or customizing it belongs in Dashboard settings.
Have the business question you want to answer	The widget title helps you choose the card or chart that matches that question.

The role dashboard controls the tab names, widget titles and report columns that you see. The
principal report's six report grids use column lists from the dashboard setup, so use

the headers
shown in your own report when you interpret those grids.

Open the Dashboard

Open the Dashboard to review the dashboard assigned to your role.

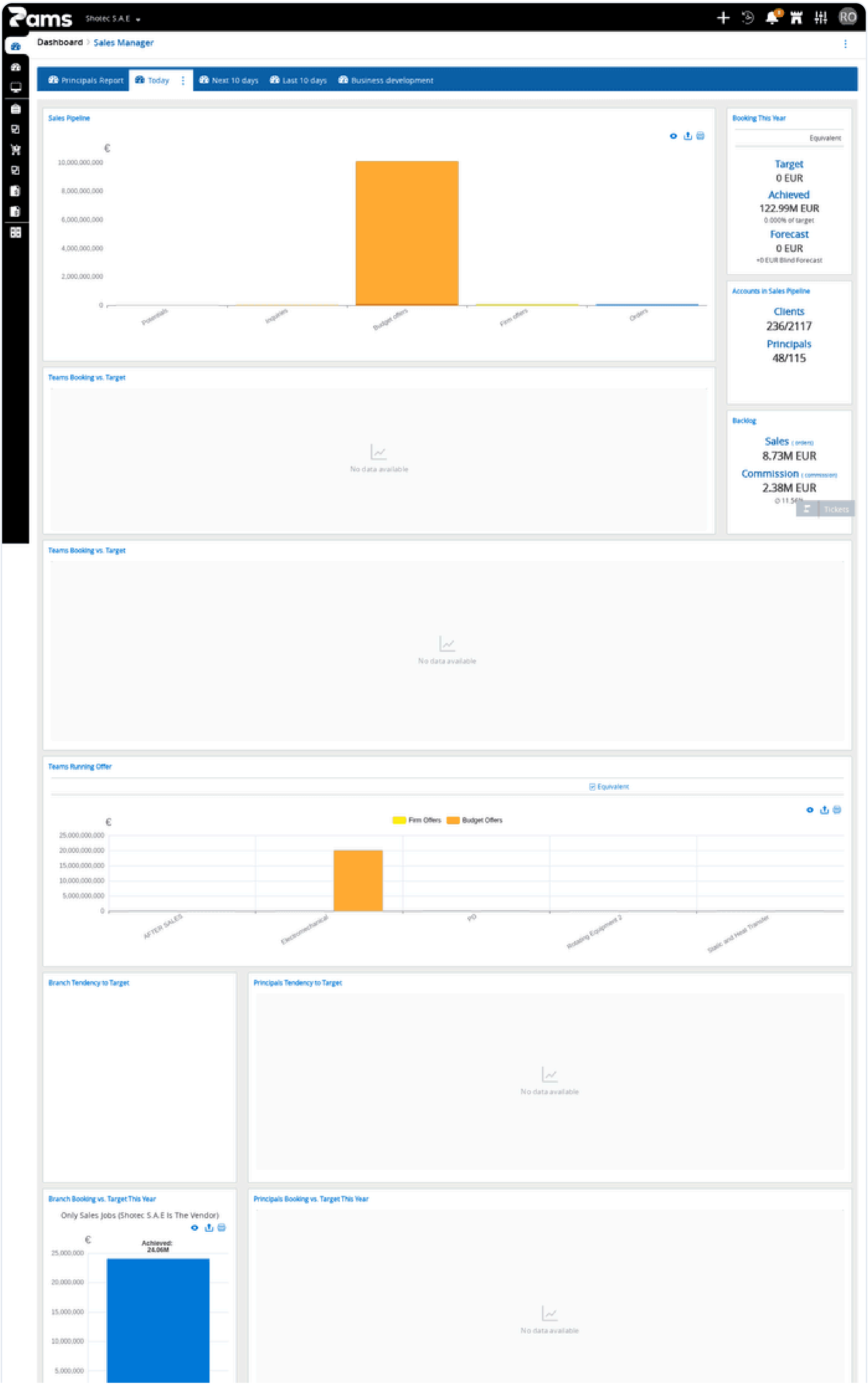
Prerequisites

- You are signed in.
- Your role has a dashboard assigned.

Steps

1. Open the Dashboard.
2. Choose the view you need from the visible tab strip:

If you need to…	Action
Review the assigned dashboard	Confirm that the page contains **Dashboard**.
Review the principal report	Select **Principals Report**.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Principals Booking vs. Target This Year
No data available

Result: The Dashboard opens. The active tab shows its cards and charts; the principal report is available when your role includes **Principals Report**.

Read dashboard content

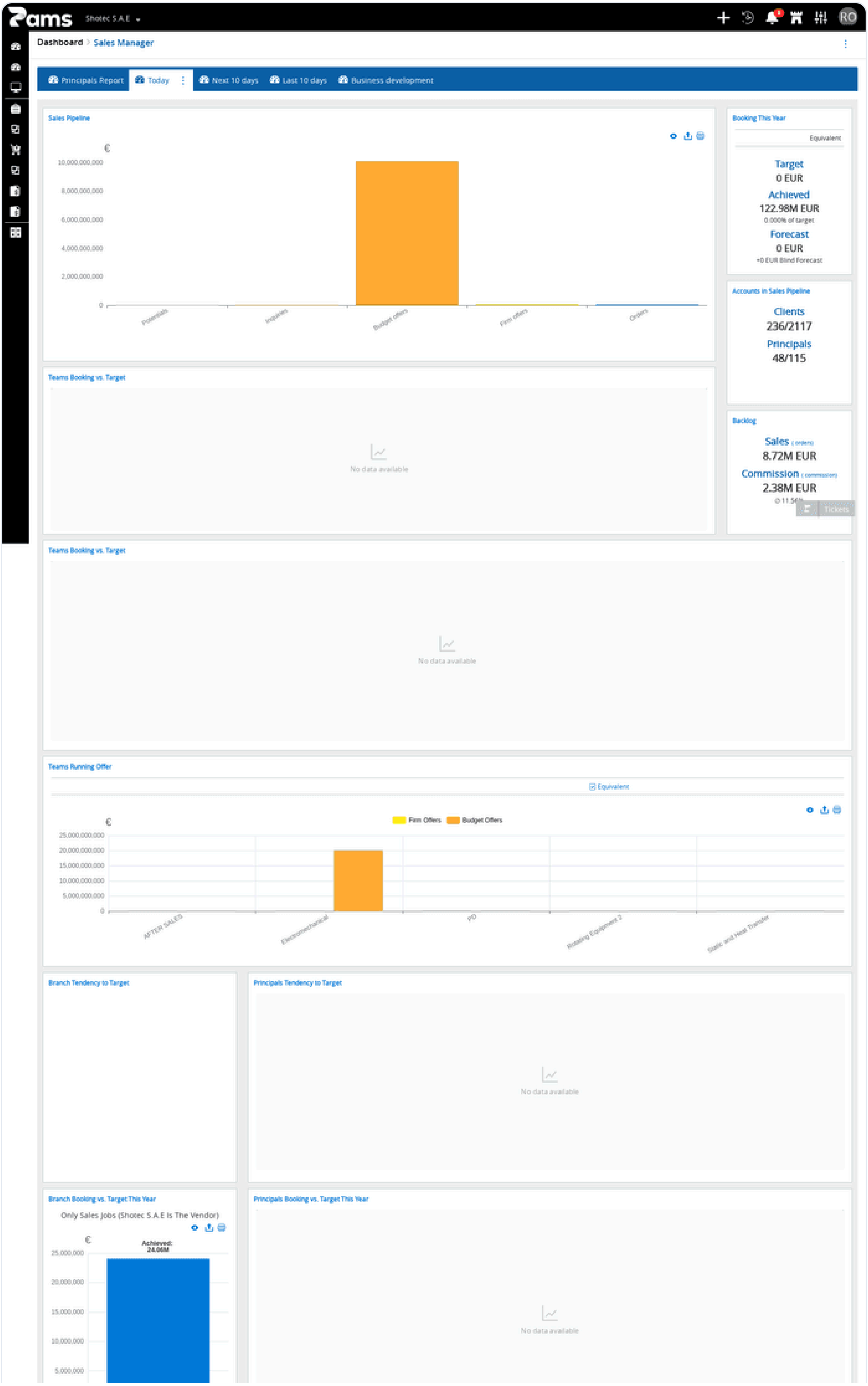
The active tab is the view whose cards and charts you are reading. The dashboard grid appears for an active user or management-report tab. The main Dashboard can show measures including **Sales Pipeline**, **Booking This Year**, **Accounts in Sales Pipeline**, **Teams Booking vs. Target**, **Backlog**, **Teams Running Offer**, **Firm Offers**, **Budget Offers**, **Branch Tendency to Target**, **Principals Tendency to Target**, **Branch Booking vs. Target This Year**, **Principals Booking vs. Target This Year**, **Branch Running Offers**, and **Principals Running Offers**.

The booking comparison view provides three sorting choices:

If you want to compare by…	Select
Booking amount	`Sort by Booking`

If you want to compare by…	Select
Target amount	`Sort by Target`
Achievement	`Sort by Achievement`

These three sorting controls arrive without a required marker. The principal report can also show report columns selected by your dashboard setup. Use the visible report headers when you read those grids.



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Next 10 days
Last 10 days
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Find widgets and continue to customization

To locate a widget already placed on the active tab, use **Search for widget** in the active tab's options menu. Adding, arranging, renaming, deleting and saving dashboard content is maintained in Dashboard settings.

Prerequisites

- The active tab contains the widget you want to locate.
- Dashboard editing is available when you need to add or change widgets.

Steps

1. Enter the widget title in the search field.
2. Select the matching widget title.

The active tab scrolls to the matching widget. When you are maintaining the dashboard, the widget
selection flow uses these controls:

If you need to…	Use
Add a widget to the active tab	**Widget**, then **Select widget**
Select every available widget	**Select all**

If you need to…	Use
Narrow the available widget list	**Keyword to search...**
Confirm the selected widgets	**OK**
Change the active tab name	**Rename tab**
Remove the active tab	**Delete tab**

The add and edit tab dialogs use the required **New Tab** field. Continue with
Dashboard settings
for the edit-mode controls, including **Widget** and **Save**, and for the complete tab-maintenance
procedure.

Result: The active tab is positioned on the widget title you searched for, or you have the exact
Dashboard settings task to add, arrange or save dashboard content.

Use the dashboard variants

Dashboard variants are separate views for different questions. **Principals Report** is the
principal-report view; **Eagle View** is the custom dashboard view. The role's saved dashboard also
determines whether a Business Analysis view is available.

Prerequisites

- You are signed in.

Steps

1. Select **Principals Report**, **Eagle View**, **Settings**, **Introduction & Outline**, **All**, or **Top 50**, according to the task in the table.

If you need to…	Use this view or control
Review the principal report	**Principals Report**
Configure which report charts are enabled	**Settings**
Read a report outline	**Introduction & Outline**
Review the custom analysis controls	`Analyze`, **Over**, **Highlight**, and **Interval**
Show all custom analysis results	**All**

If you need to…	Use this view or control
Limit custom analysis results	**Top 50**

When **Settings** is open in **Principals Report**, the panel can show the required **Report** field.
Its report choices include:

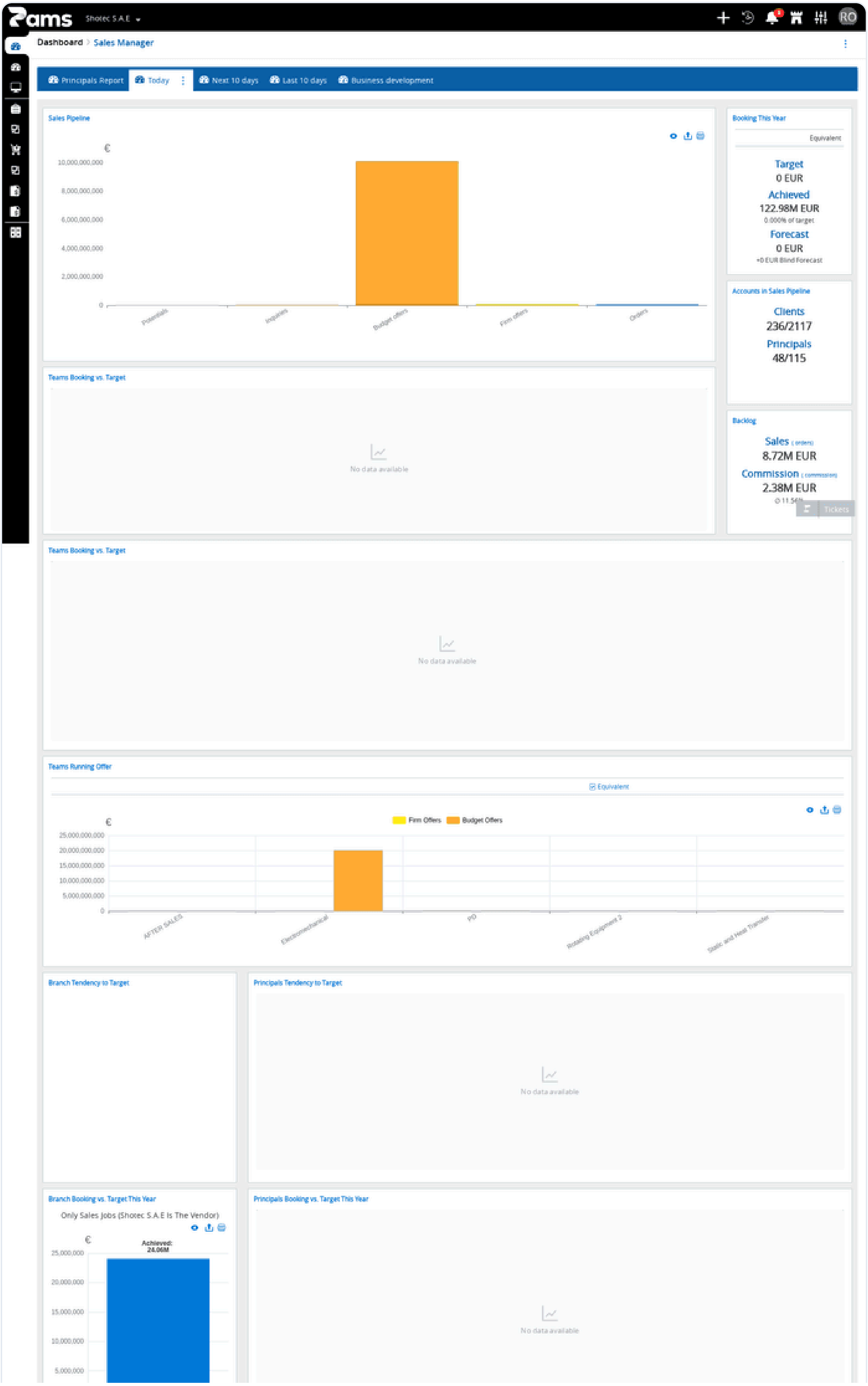
Report choice	Display option
Running jobs	**Bar** or **Pie**
Status of running firm offers	**Bar** or **Pie**
Status of running orders	**Bar** or **Pie**
Reasons for lost jobs	**Bar** or **Pie**
Bookings over time	**Monthly**, **Quarterly**, or **Yearly**
Deliveries over time	**Monthly**, **Quarterly**, or **Yearly**
Status of submitted offers	**Bar** or **Pie**
Sales Overview + Overall Analysis	**Monthly**, **Quarterly**, or **Yearly**
Show Lists	List display
Client	Client selection
Product Type	Product type selection
Tickets	Ticket selection

The report settings panel includes **Generate Report**, **Download as PDF**, and **OK**. The custom
analysis controls are available only when **Eagle View** is the active tab.

The **Introduction & Outline** view provides these report sections:

Report section	Use it for
Introduction :	The report introduction
Sales Analysis :	Sales analysis
Lost Opportunities and Competition :	Lost opportunities and competition
Client Complaints and Difficulties :	Client complaints and difficulties
Suggestions for Business Improvement :	Suggested business improvements
Booking Forecast :	Booking forecast

Report section	Use it for
Conclusion :	The report conclusion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Achieved:
24.06M
Principals Booking vs. Target This Year

Result: The selected dashboard variant or settings panel is displayed with its available
controls.

When the Dashboard is unavailable

An empty role dashboard is the branch to use when no dashboard has been defined for your role.

What you see	What to do
`Your role has no dashboard`	Contact your administrator to define a dashboard for your role.
`Kindly, Contact your administrator to define a dashboard`	Ask your administrator to define the role dashboard.
Eagle View is not available	Use the tabs available to your role, or ask your administrator about the role's dashboard setup.

When a principal report request cannot be processed, the page can display these exact messages:

Message	What to do
`An error occurred while processing your request`	Review the report choices and try the report action again.
`Please choose one or more principals`	Choose one or more principals before generating the report.

Continue to Dashboard settings

Use Dashboard settings when you build or customize role dashboards. That page owns the dashboard-maintenance tasks for tabs, widgets, saved arrangements and role-specific dashboard setup.

The Dashboard settings task uses the success message `Your request was completed successfully` after a completed settings request.