

Management report widgets

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Management report widgets are grouped report views for comparing management measures, financial information, rankings, aging, and bonus information. The groups keep related views together instead of requiring you to search for each widget separately.

If you need to...	Go to
Understand the overview first	Overview
Find the general widget picker	Widget catalog
Review sales and backlog measures	Sales and backlog widgets
Review pipeline and status measures	Pipeline and status widgets
Review principal-report selection	Principal report
Maintain tabs and widget settings	Settings

Prerequisites

Before you choose a management report widget, open the overview. Select the tab where you want to review or maintain widgets. The widget library is the surface where widgets are selected. Edit mode is the state in which widget tools and tab-management entries are available. The widget library is available when the module is included in your subscription. The widget grid appears when the selected tab contains at least one widget.

Before you start	What it determines
The module is included in your subscription	The widget library can appear.
The selected tab contains at least one widget	The widget grid appears.
The selected tab is in edit mode	Widget tools and tab-management entries are available.
Your role, subscription, and setup support the catalog branch	The available rows can differ.
The selected tab supports the widget picker	The widget picker can appear.

Find and open the widget catalog

The widget catalog is the place where you find available cards and charts for the selected tab.

Prerequisites

- You can open the overview.
- The tab you want to review is selected.

Steps

1. Open the overview.
2. Select the tab that owns the widgets you want to review.
3. Open the widget catalog for the selected tab.
4. Select **Search for widget** when the catalog menu is open.
5. Enter a widget title in **Search for widget**.
6. Review the matching widget rows.

Result: The matching widget rows are visible in the widget catalog when the catalog is available.

Understand the catalog and report surface

The report surface contains tabs and a widget area.

The widget catalog uses a multi-select grid with a search panel, thumbnails, titles, and descriptions.

The thumbnail and title columns are visible in the catalog grid.

The identifier and description columns are conditional.

When the report surface is in edit mode, the active tab menu contains **Rename tab** and **Delete tab**.

The tab popup labels its tab-name field **New Tab**.

Its deletion choices include **Cancel** and **Delete**.

The live report surface displays the following labelled sorting controls without a required marker:

Control	What you can review with it
Sort by Booking	Principal booking order
Sort by Target	Principal target order
Sort by Achievement	Principal achievement order

The report surface also displays **Principals Report, Today, Next 10 days, Last 10 days, Sales Pipeline, Accounts in Sales Pipeline, Teams Booking vs. Target, Backlog, Teams Running Offer, Branch Tendency to Target, Principals Tendency to Target, Branch Booking vs. Target This Year, Branch Running Offers, Firm Offers, and Budget Offers.**

The account hit-rate widget provides **Client**, **Principals**, **Sales responsible**, **Teams**, **Market segment**, and **Product types** choices, with count-rate and value-rate data.

Review MRM widgets

The selectable MRM set covers booking, backlog, L/G, warehouse, sales, cost, profit, currencies, receivables, payables, net profit, gross margin, and forecast cash flow. MRM widgets are available when the required subscription is present.

MRM widgets in the catalog are locked and cannot be moved. When editing is allowed, editable financial widgets permit the current month or the immediately preceding month.

Total Sales provides **Taxable**, **Pams data**, and **Manual data** choices, together with group-and-product views and the documented sales measures.

Receivables and payables require **Currency** when a missing or new currency is entered in an editable row.

Forecast Cash Flow provides invoice-delay settings. For each setting, enter a number, choose **Days**, **Weeks**, or **Months**, and select **Apply**.

Choose and manage widgets

Choosing a widget adds it to the selected widget list for the active tab. A widget already in that tab cannot be added a second time. In edit mode, the widget menu contains **Remove widget from tab**.

Prerequisites

- The tab you want to change is selected.
- The report surface is in edit mode when widget tools are required.

Steps

1. Open the widget catalog for the selected tab.
2. Choose the widgets to add:

If you need to...	Action
Add specific widgets	Select the individual widget rows.
Add every available widget	Select Select all .

3. Return to the report grid.
4. Open the widget menu for the widget you want to remove.
5. Select **Remove widget from tab**.

Result: The selected report tab contains the widgets you selected, and a removed widget no longer appears in that tab.

Handle widget availability and report branches

Report tabs can show different report views. User and MRM report tabs use the standard widget area, while **Principals Report** and **Eagle View** use separate views.

If you are reviewing...	Use this guidance
Ranking views	Review the ranking rows for principals, clients, vendors, teams, market segments, account managers, product types, variants, months, sales, offers, backlog, and account hit rate.
Cash views	Review receivables, cash-cover, invoice, outstanding-commission, and forecast-backlog-payment rows.
MRM views	Review the available booking, warehouse, finance, project-management, cash-flow, receivables, payables, profit, currency, and shipment rows.
Aging views	Review aging receivables.
Bonus views	Review Bonus Distribution and Teams Tendency and Bonus.
Other report views	Review pipeline, booking, offers, orders, deliveries, tasks, visits, targets, trends, statuses, guarantees, and time-based comparisons.

The live report surface shows principal names and numeric readouts rather than a data grid in **Principals Report**.

When widget selection fails

Use the exact message on screen to choose the corrective action.

Message	What it means	What to do
This Field Is Required	A required tab value is empty.	Enter the tab value, then submit the tab action again.
You already have a tab with the same name	The tab name is already used.	Enter a different tab name.
You already have this tab in this dashboard	The selected tab already exists in this report.	Continue with the existing tab or choose a different tab.
You already have this widget in this tab	The selected widget is already in the tab.	Keep the existing widget instead of adding it again.
Your request was completed successfully	The request completed successfully.	Return to the report surface and review the selected tab.
An error occurred while processing your request	The request did not complete.	Retry the action from the owning report or report page.
Please choose one or more principals	Principal selection is required for the Principal report.	Continue with Principal report .

What to do next

After selecting or removing a widget, review the selected report tab.

If you need to...	Continue with
Review the report surface and its tabs	Overview
Review the general widget picker	Widget catalog
Review sales and backlog measures	Sales and backlog widgets
Review pipeline and status measures	Pipeline and status widgets
Review principal-report selection or columns	Principal report
Maintain report tabs and widget settings	Settings

Result: You are back on the report tab that owns the widget, or on the owning report page when the widget branch requires report-specific selection.