

Pipeline and status widgets

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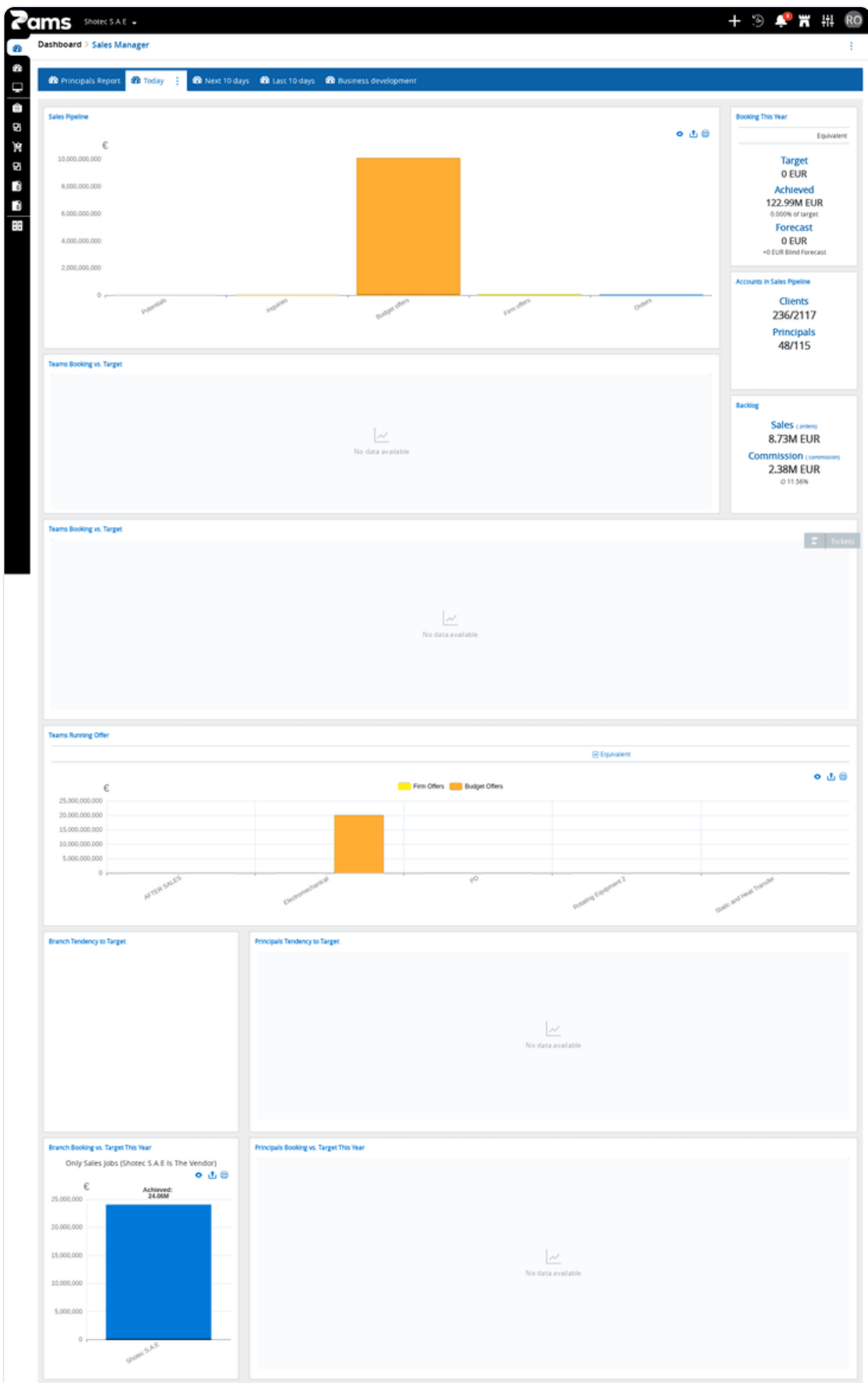
Pipeline and status widgets

Pipeline and status widgets are grouped dashboard views for reviewing sales coverage and near-term activity. Use them when you need to compare offer or order status, accounts, bids, forecasts, or visits. The Dashboard is organised into role-based tabs, so the visible tab names separate the measures available for your work.

The dashboard view includes **Dashboard**, **Principals Report**, **Today**, Next 10 days, and

Last 10 days. Each available widget title identifies the subject you are reviewing.

If you need to...	Go to
Locate a widget on a visible dashboard tab	Find a widget on the dashboard
Read pipeline, account, offer-status, or order-status rows	Understand the grouped results
Choose a time-based bid, forecast, or visit view	Choose a bid, forecast, or visit view
Review dashboard setup and role-based tabs	Dashboard overview
Add or manage widgets in the catalog	Dashboard widget catalog
Review sales and backlog measures	Sales and backlog widgets
Review management reporting measures	Management report widgets





Before you start

The dashboard library is available when its subscription check passes. A visible tab must be available, and the active tab must contain widgets. The search field and widget titles appear for an active user or MRM tab that contains widgets. A result also depends on selecting the matching widget and having the dashboard surface it uses.

What must be in place	What you can look for
Dashboard library access	The dashboard library is available.
A visible active tab	The tab title is visible and the tab is active.
Widgets on that tab	Search for widget and the widget titles are available.
A matching widget and its dashboard surface	The selected widget displays its grouped result.

No record, saved-state, permission, or data-collection step is part of reviewing these grouped dashboard results.

Find a widget on the dashboard

Use this procedure to locate a displayed pipeline, status, account, bid, forecast, or visit widget.

Prerequisites

- The dashboard library and a visible active tab are available.
- The active tab contains widgets.

Steps

1. Open **Dashboard**.
2. Select the visible dashboard tab that contains the widget.
3. Open the active tab's widget list.
4. Enter the displayed widget title in **Search for widget**.
5. Select the widget title that matches the measure you need.

Result: The active tab shows the widget title that matches your search. The dashboard also shows **Sort by Booking**, **Sort by Target**, and **Sort by Achievement**.

Understand the grouped results

Grouped result widgets summarise sales work as rows and measures rather than as data-entry fields.

The visible dashboard includes pipeline, account, offer-status, and order-status subjects.

Prerequisites

- You have found the relevant widget title on the active dashboard tab.

Steps

1. Select the displayed widget title that matches the result you need.

If you need to...	Select	Then read
Review pipeline results	Sales Pipeline	The pipeline rows
Review account results	Accounts in Sales Pipeline	The account rows and measures
Review firm-offer status	Statuses of Jobs in Offer Stage (Firm Offers)	The offer-status rows
Review running-order status	Statuses of Running Orders	The order-status rows

The pipeline rows can include **Potentials**, **Inquiries**, **Budget offers**, **Firm offers**, and **Orders**. Use the visible sort choices when comparing the displayed measures.

Result: You can identify the pipeline, account, offer-status, and order-status result family from its displayed title and read the grouped rows shown for that widget.

Read the displayed rows, measures, counts, values, and columns for the selected widget.

Choose a bid, forecast, or visit view

Bid and visit widgets separate activity by period, while forecast widgets present a forecast measure. Choose the title that matches the question you need to answer.

Prerequisites

- The active dashboard tab contains the bid, forecast, or visit title you need.

Steps

1. Select the displayed widget title that matches your question.

If you need to...	Select
Review upcoming bid due dates	Bid Due Date in Next 10 Days
Review bid due dates in the previous period	The displayed bid title for the previous 10 days
Review a forecast measure	The displayed forecast title that matches the measure
Review visits from the previous 10 days	Visits in Last 10 Days
Review planned visits for the next 10 days	Planned Visits in Next 10 Days

2. On a forecast view, select **Including Forecast** when that control is available.

Result: The active tab shows the selected bid, forecast, or visit view.

When a widget or result is not available

Start with the active tab and the displayed widget title when a result is not available.

The

widget list depends on the active tab containing widgets, and each widget depends on its matching selection and dashboard surface.

Prerequisites

- You are on the dashboard.
- You can see the active tab and its displayed widget titles.

Steps

1. Check the active tab and the displayed widget title.

What you see	What to do
The widget list is not shown	Select a visible active tab that contains widgets.
A named widget does not appear	Check another visible tab and search using the displayed widget title.
A result does not appear after selecting its title	Check that the selected title matches the result and that its dashboard surface is available.
Your request was completed successfully	Continue reviewing the displayed dashboard result.
An error occurred while processing your request	Select the displayed widget title again.

2. Read the displayed rows, measures, counts, values, and columns for the configured dashboard surface.
3. Use the surrounding widget title to identify the result opened by an icon-only view action.

Result: You know which tab, title, or dashboard surface to check, and you have reviewed the available rows, measures, counts, values, and columns without changing the underlying records.

What to read next

If you need to...	Read
Understand dashboard setup and role-based tabs	Dashboard overview
Add, remove, or manage widgets	Dashboard widget catalog
Review sales and backlog measures	Sales and backlog widgets
Review management reporting measures	Management report widgets
Choose principals for the Principal report	Principal report
Review general navigation	Navigation basics

The message `Please choose one or more principals` belongs to the Principal report's principal

selection and report-generation panel. Use [Principal report](#) for that task.