

Sales and backlog widgets

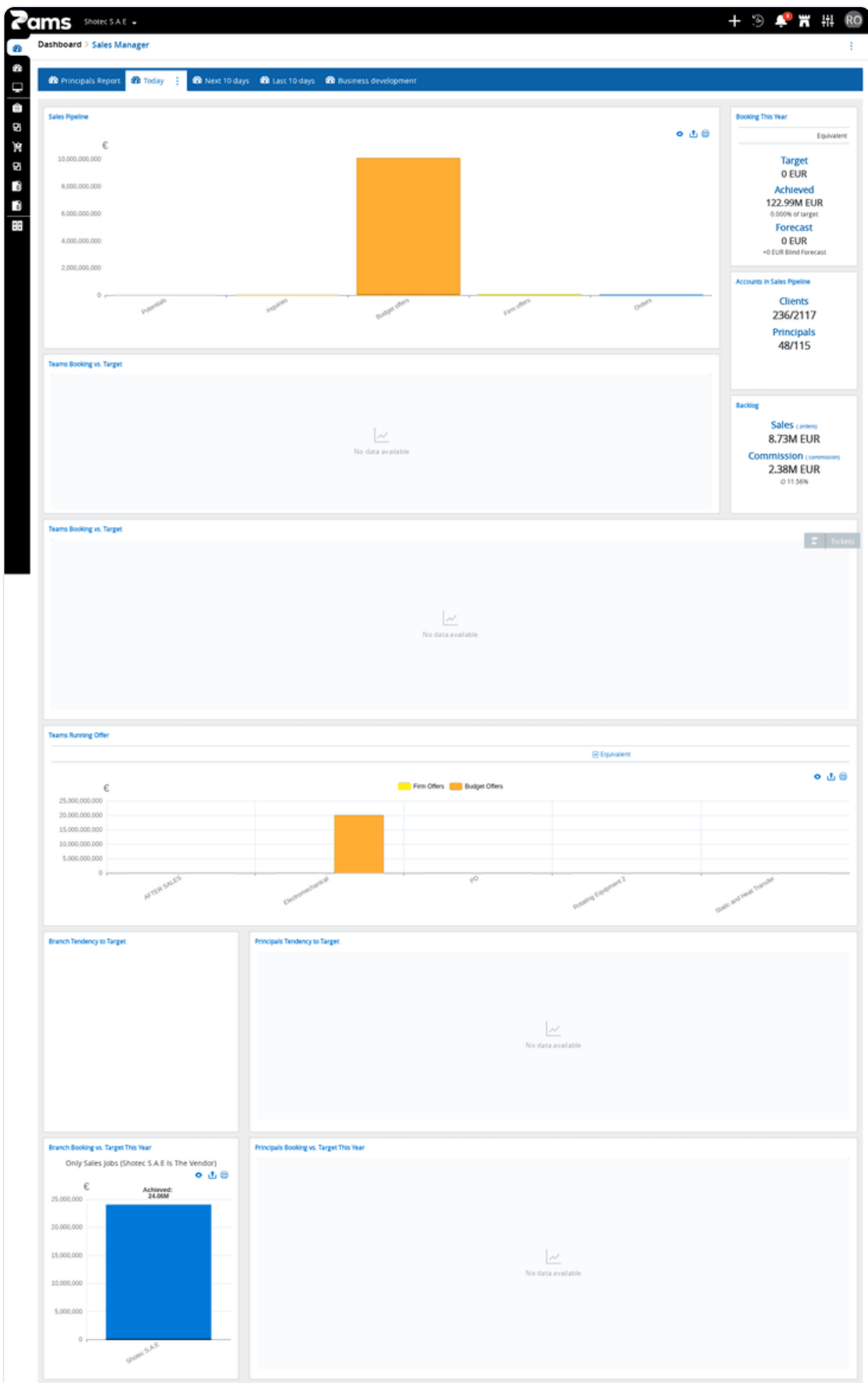
September 10, 2026

Sales and backlog widgets

Sales and backlog widgets

Sales and backlog widgets are dashboard views for monitoring sales activity, backlog, booking, team, branch, and due-date work. The catalog groups related views so you can choose the widget that answers the business question you are working on.

If you need to...	Go to
Reach the dashboard and locate the configured rows	Find the dashboard widgets
Understand how the widget families are grouped	Understand the widget catalog
Change a widget's displayed view or selection	Use widget controls
Understand why a widget or action appears conditionally	Handle widget availability and branches
Diagnose an unsuccessful action or an unavailable row	When a widget or action does not work
Learn about the general dashboard surface	Dashboard overview
Review the broader widget selection	Dashboard widget catalog





Before you start

Prerequisites

- Sign in with access to the dashboard.
- Know which business question you want to answer: sales activity, backlog, booking, team, branch, or due-date work.
- Work from a dashboard whose selected widgets and display options are already configured.
- If a widget is subscription-gated, use a dashboard where that widget is available.

The dashboard page is available from your dashboard access. The visible rows depend on the selected widget set, the available dashboard options, and the chart selection that matches each widget.

Subscription

availability also changes which widget surface appears. A subscription-gated widget is available

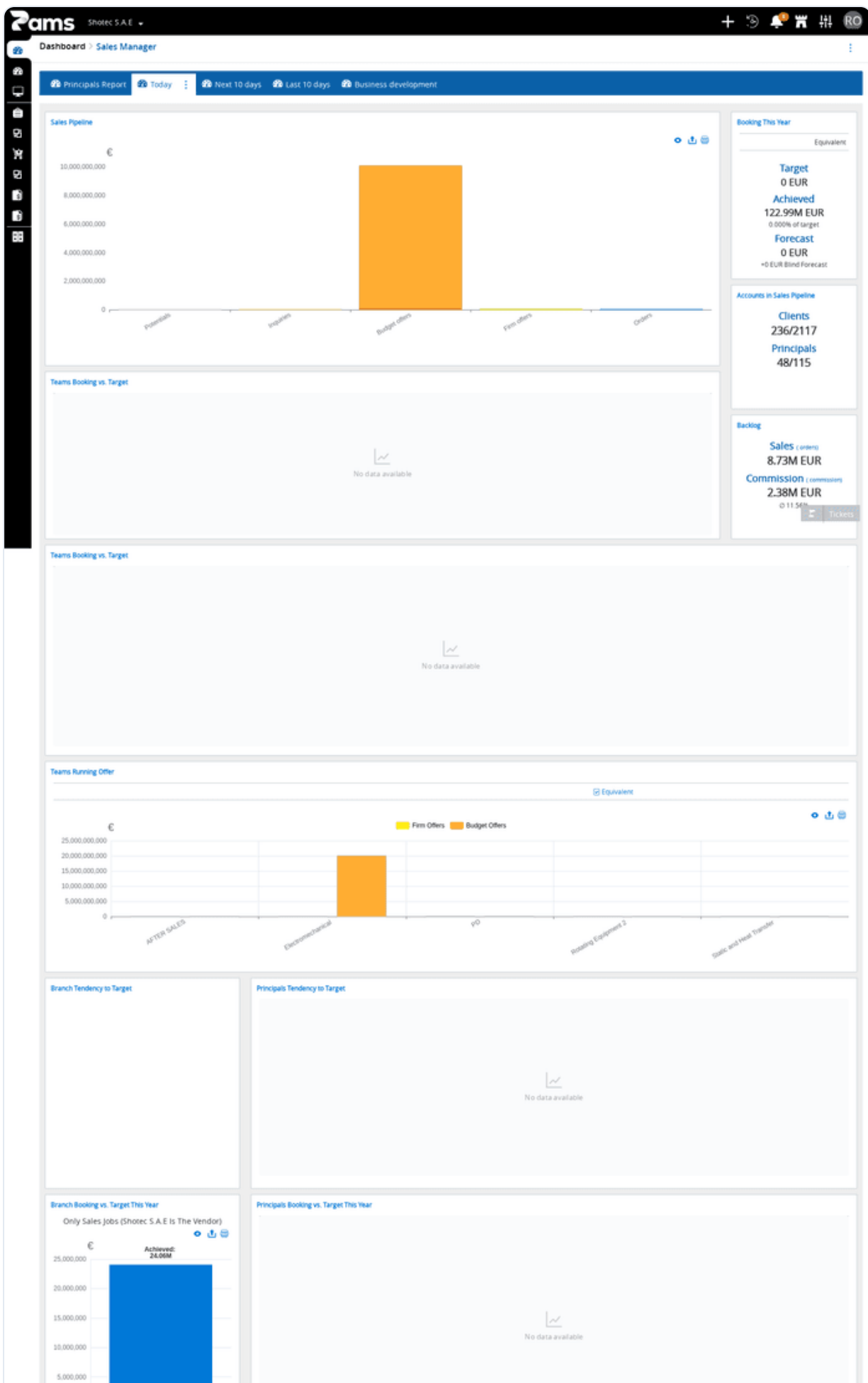
only when the current dashboard access allows it.

Find the dashboard widgets

Use the dashboard to find configured widget rows.

Steps

1. Open the dashboard page.
2. Locate the configured rows by their visible widget titles, such as **Booking This Year**, **Teams Booking vs. Target**, **Branch Booking vs. Target This Year**, or **Branch Running Offers**.



The widget catalog is a grouped set of dashboard views. Each family answers a different monitoring question, while the visible rows depend on the dashboard configuration.

Family	Use it to look at...
Sales widgets	Sales activity and sales comparisons
Backlog widgets	Work remaining in the backlog
Booking widgets	Booking totals, targets, and achievement
Teams widgets	Team booking and running-offer views
Branch widgets	Branch tendency, booking, and running-offer views
Due-date widgets	Items approaching or passing a due date

The dashboard surface contains a widget grid. The available grid information does not provide reader-facing field labels, so use the headers and titles you can see on your configured dashboard rather than internal names.

The current dashboard surface visibly includes **Booking This Year, Teams Booking vs. Target**, and **Branch Booking vs. Target This Year**.

Use widget controls

Use widget controls to change the view within a configured widget or manage the widget selection.

Prerequisites

- You have opened the dashboard page.
- The relevant widget is present in the configured dashboard.
- For widget selection, the dashboard is in its edit state and the widget-selection surface is open.

Steps

1. Choose the option that answers your question.

If you need to...	Choose...
See the company view in the booking-today chart	Only My Company
Use equivalent booking as the basis	Equivalent
Include forecast data	Including Forecast
Filter the account hit-rate view to sales jobs	Only Sales Jobs
Use commission invoices in the backlog-payment view	Commission Invoices
Use sales invoices in the backlog-payment view	Sales Invoices
Show current offers	Only Current Offers
Show budget offers	Budget Offers
Show firm offers	Firm Offers
Use a product-type breakdown	Product Types

If you need to...	Choose...
Show the sales-team breakdown	Sales Teams

2. Apply the additional action that matches your task.

If you need to...	Choose or read...
Read the booking series	Target, Total, and Achieved
Select every available widget	Select all
Remove the selected widget in edit mode	Remove widget from tab
Sort a branch or principal booking view	Sort by Booking, Sort by Target, or Sort by Achievement

Result: The selected widget remains on the dashboard with the chosen view, filter, series, or selection state. If an expected option is absent, check the conditions in the next section.

Handle widget availability and branches

A widget appears when its selected widget entry, dashboard options, and matching chart selection

allow it to appear. An edit-only menu appears only in edit mode, and a subscription-gated widget

uses the subscription branch for the current dashboard access.

Steps

1. Check the widget title and its visible options before choosing a filter or series.
2. Choose only the controls shown for that widget, such as **Including Forecast** for a forecast comparison or **Only Sales Jobs** for the account hit-rate view.
3. If the dashboard has no configured dashboard, follow the on-screen instruction to contact your administrator.

Result: You work with the widget options that are available for the selected dashboard view.

If an action returns a message, use the message text in the next section to choose your next move.

When a widget or action does not work

Use the message text and the widget's visible condition to decide what to do next.

What you see	What it means	What to do
Your request was completed successfully	The dashboard action completed successfully.	Continue with the updated dashboard view.
An error occurred while processing your request	The dashboard action returned an error.	Check the widget selection and available dashboard options, then retry the action.
A widget option is absent	That option is conditional on the selected widget, edit state, chart selection, or subscription availability.	Work with the options visible for the current widget.

The dashboard read-only surface showed no dialog, confirmation message, validation message, or error message. It stayed on the dashboard page.

Continue from the dashboard widgets

After identifying the widget family you need, continue with the page that owns the next question:

- Dashboard overview explains the general dashboard surface.
- Dashboard widget catalog covers the broader widget-selection reference.
- Pipeline and status widgets covers pipeline, status, account, bid, forecast, order, and visit families outside this page's grouped catalog.
- Management report widgets covers management-report families outside this page's scope.

Continue with the relevant dashboard reference after you have identified the view you need.