

Configuring Dashboard Settings

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Opening Dashboard Settings and Reviewing Existing Configuration

Dashboard Settings controls the dashboard definitions and booking rules used by performance widgets in Pams. Because these settings can change how Booking and Equivalent Booking values appear to dashboard users, review the current configuration before making an update.

1. Sign in to Pams using an account with administrator access. If you cannot open **Dashboard settings** or cannot save changes, ask an administrator to review your access.
2. Open **Configuration**, then select **Dashboard settings**. This area contains the dashboard configuration used for dashboards and their performance widgets.
3. Review the existing dashboard definition entries before opening one for editing. Focus on the identifying name or label of each definition so you can distinguish similar dashboards, such as dashboards intended for a particular sales team, Principal, or reporting purpose.
4. Open the dashboard definition that is closest to the configuration you need to review. Check the performance widgets associated with it and note which dashboard context they are intended to support.
5. Locate the existing booking rule entries in **Dashboard settings**. Review each rule's name or label and its booking criteria to understand which Booking records currently contribute to performance-widget results.
6. Do not change a dashboard definition or booking rule solely because its name is unclear. First confirm its purpose by reviewing its widget configuration and booking criteria. A rule that appears similar may be used for a different performance view.

[SCREENSHOT: Dashboard settings showing existing dashboard definition entries and booking rule entries]

Reviewing both areas together helps you avoid changing a dashboard definition while overlooking the booking rules that affect the numbers shown in its performance

widgets. Keep the current configuration in mind before adding a new entry or updating an existing one.

Creating and Maintaining Dashboard Definitions

A dashboard definition establishes the configurable dashboard arrangement used by performance widgets. Use a clear definition when the dashboard needs a distinct set of performance widgets or when an existing configuration must be adjusted.

1. In **Configuration > Dashboard settings**, start a new dashboard definition from the available dashboard-definition controls.
2. In the dashboard definition form, enter the identifying **Name** or label requested by Pams. Choose wording that explains the dashboard's purpose at a glance. For example, use a name that reflects the sales focus, reporting purpose, or group that will use the dashboard.
3. Review the remaining configuration options shown in the form. Complete only the options that apply to the dashboard definition you are creating. Do not use a general label such as "Dashboard" when multiple dashboard definitions will exist.
4. Before saving, check that the name or label is distinct from existing dashboard definitions. Similar names can make it difficult for administrators to select the right configuration during future updates.
5. Select **Save** to make the dashboard definition available in **Dashboard settings**.
6. Reopen the saved entry and confirm that Pams displays the correct name or label. This is especially important if you are creating definitions for different Principal, sales, or Booking performance views.

To update an existing definition, open its entry from the dashboard definition list, revise the displayed configuration, and select **Save** again. Use **Save and Close** when that option is available and you have finished reviewing the entry.

[SCREENSHOT: Dashboard definition form with the Name or identifying label and Save action visible]

Keep dashboard definitions focused. If two dashboards need different performance-widget arrangements, maintain separate, clearly named definitions rather than using one unclear configuration for both.

Assigning Performance Widgets to a Dashboard Definition

Performance widgets are configured from the dashboard definition that controls where they appear. Configure widgets from the correct definition so the intended dashboard shows the correct performance information.

1. Open **Configuration > Dashboard settings** and select the dashboard definition you want to update.
2. Review the widget configuration shown within that dashboard definition. Identify the widgets already associated with the definition before adding, selecting, or changing any widget configuration.
3. Select or configure the performance widgets that belong in this dashboard context. Use the definition's available widget controls to associate each widget with the dashboard definition.
4. Check the purpose of each selected widget. A widget that reports Booking, Equivalent Booking, target progress, forecast, profitability, or another performance measure should be included only when it supports the dashboard definition's stated purpose.
5. Review the complete widget configuration before saving. Confirm that the definition includes the widgets users need and does not include a widget intended for another dashboard definition.
6. Select **Save**. Reopen the dashboard definition after saving and verify that the expected performance widgets remain associated with it.

When reviewing widget placement, distinguish between the dashboard definition and the widget result. The dashboard definition determines which performance widgets are configured for that dashboard. The widget result is the performance information users see after Pams evaluates the relevant Booking data.

If a widget should be visible in more than one dashboard context, review each dashboard definition separately. Do not assume that assigning a widget to one definition automatically configures it for another definition.

[SCREENSHOT: Dashboard definition showing its associated performance-widget configuration]

Use consistent dashboard-definition names while making widget changes. This helps you confirm that you are configuring the intended dashboard before selecting **Save**.

Defining Booking Rules for Performance Calculations

Booking rules determine which Booking records contribute to the values shown in performance widgets. Use a booking rule when the performance view must include a defined group of bookings and exclude bookings that do not belong in that calculation.

1. In **Configuration > Dashboard settings**, start a new booking rule from the available booking-rule controls.
2. Enter the identifying **Name** or label requested by the booking-rule form. Make the name specific enough to explain the population of Booking records it is intended to evaluate.
3. Configure the booking criteria shown in the form. Set the criteria so the rule includes the Booking records that belong in the performance calculation and excludes unrelated records.
4. Review the criteria before saving. Consider whether the rule matches the intended sales, Principal, team, or reporting context represented by the dashboard definition and performance widget.
5. Select **Save** to store the booking rule.
6. Reopen the saved booking rule and verify that its name or label and displayed criteria are correct. A saved rule should be easy to identify later when reviewing a performance widget's Booking results.

Update an existing booking rule whenever the booking eligibility requirements change. Open the rule from **Dashboard settings**, revise the displayed criteria, and select **Save**. Because a rule change can affect the values shown in performance widgets, review the related dashboard definition before and after making the update.

[SCREENSHOT: Booking rule form showing the identifying name and booking criteria]

A booking rule should describe one clear performance population. Avoid using a vague rule name when different dashboards need different Booking results. Clear rule names reduce the risk of applying the wrong criteria to a performance-widget configuration.

Coordinating Dashboard Definitions and Booking Rules

Dashboard definitions and booking rules work together, but they control different parts of the dashboard result. A dashboard definition controls the dashboard context and the performance widgets configured for it. A booking rule controls the Booking data evaluated when those performance widgets calculate their results.

Use the following approach when coordinating these settings:

- Start with the dashboard definition. Review its identifying name or label and the performance widgets configured within it. This tells you what users are expected to see in that dashboard context.
- Then review the related booking rule. Confirm that its criteria identify the correct Booking records for the performance measure shown by the widget.
- Keep the purpose aligned. For example, if a dashboard definition is intended for a particular performance view, its associated Booking criteria should not include unrelated Booking records that would change the displayed result.
- Review dashboard definitions whenever you revise a booking rule. A change to booking eligibility can alter Booking totals, Equivalent Booking values, forecast figures, target progress, and other results displayed by performance widgets.
- Use distinguishable names for both entries. A dashboard definition name should identify the dashboard context, while a booking rule name should identify the Booking population being evaluated.
- Save each updated entry separately and reopen it from **Dashboard settings** to confirm that Pams retained the intended configuration.

Do not treat a visible widget as proof that its underlying Booking population is correct. A performance widget can be present in the right dashboard definition while still showing unexpected results if the applicable booking rule includes too many or too few Booking records.

This separation is useful when performance reporting needs change. You can review the dashboard definition to confirm widget placement, then review the booking rule to confirm the data basis for the values displayed in those widgets.

Verifying Dashboard and Booking Rule Configuration

After saving dashboard definitions and booking rules, verify both the dashboard layout and the Booking results. This check helps identify missing performance widgets or unexpected values before users rely on the dashboard for sales, Principal, target, or forecast reviews.

1. Open the dashboard that uses the configured dashboard definition. Confirm that the expected performance widgets are visible in the intended dashboard context.
2. Compare the displayed widgets with the widget configuration saved in **Configuration > Dashboard settings**. If a required widget is missing, reopen the dashboard definition and confirm that the widget is included in its configuration.

3. Review the results shown by booking-based performance widgets. Check Booking records that should meet the booking-rule criteria and Booking records that should not meet those criteria.
4. If the widget results are higher, lower, or otherwise different from what you expect, return to **Dashboard settings** and open the relevant booking rule. Review the displayed criteria carefully.
5. Confirm that recent changes were saved. Reopen both the dashboard definition and the booking rule to make sure Pams shows the latest name, widget configuration, and booking criteria.
6. Save any corrections, then return to the dashboard and review the performance widgets again.

[SCREENSHOT: Configured dashboard showing performance widgets used to verify Booking results]

When investigating an issue, check the dashboard definition first if the widget is missing. Check the booking rule first if the widget is present but its Booking-based values are unexpected. This separates a widget-configuration issue from a Booking-criteria issue and keeps the review focused.

Overview

Dashboard settings provides the configuration used to control performance widgets in Pams dashboards. It is intended for administrators who need to maintain how dashboard views are defined and which Booking records are evaluated for performance results.

The main elements are:

- **Dashboard definitions:** These establish a configurable dashboard context. Each definition has an identifying name or label and a performance-widget configuration. Use dashboard definitions to keep distinct dashboard views organized and understandable.
- **Performance widgets:** These are the dashboard items that display performance information. Their placement and configuration are maintained through the relevant dashboard definition.
- **Booking rules:** These define the Booking records that contribute to performance-widget results. Booking rules are particularly important where results depend on the intended population of bookings.

- **Booking and Equivalent Booking results:** Booking is a sales performance measure tracked against targets and forecasts. Equivalent Booking provides a comparable Booking value using reference commission and reference margin, helping teams compare deals with different commercial terms fairly.

Dashboard definitions answer the question, “Which performance widgets should appear in this dashboard context?” Booking rules answer the question, “Which Booking records should these widgets evaluate?”

Use **Dashboard settings** when you need to create or update a dashboard definition, change the performance widgets associated with a definition, or revise the Booking criteria affecting performance-widget results. Use the dashboard itself to confirm the outcome after saving configuration changes.

For guidance on using dashboards and reports as an operational user, see [Using Dashboards and Reports](#).

Prerequisites

Before changing **Configuration > Dashboard settings**, make sure you have the information needed to identify the correct dashboard definition and Booking population. These settings affect performance widgets that may be used for sales reviews, Principal reporting, Booking targets, forecasts, and operational decisions.

- Sign in to Pams with administrator access. You must be able to open **Dashboard settings** and use **Save** or **Save and Close** after making a change.
- Identify the dashboard definition you need to maintain. Review its existing name or label so you do not create a duplicate or edit a similarly named definition by mistake.
- Know which performance widgets belong in the dashboard context. Review whether the dashboard should show the required Booking, Equivalent Booking, forecast, target, profitability, or other available performance information.
- Identify the Booking records that should contribute to the relevant performance-widget result. Be clear about which bookings belong in the calculation and which must be excluded.
- Review any existing booking rule before creating a new one. An existing rule may already represent the correct Booking population, or it may need a focused update rather than replacement.
- Coordinate with the people responsible for the relevant sales, Principal, or reporting view when the purpose of a dashboard definition or booking rule is

unclear. Use the displayed configuration in **Dashboard settings** as the basis for that discussion.

- Plan to verify the dashboard after saving. You should be able to open the relevant dashboard and compare the visible performance widgets and their Booking-based values with the configuration you saved.

After dashboard definitions and booking rules are in place, continue with [Managing Document Templates](#) to maintain the templates used for Pams documents.