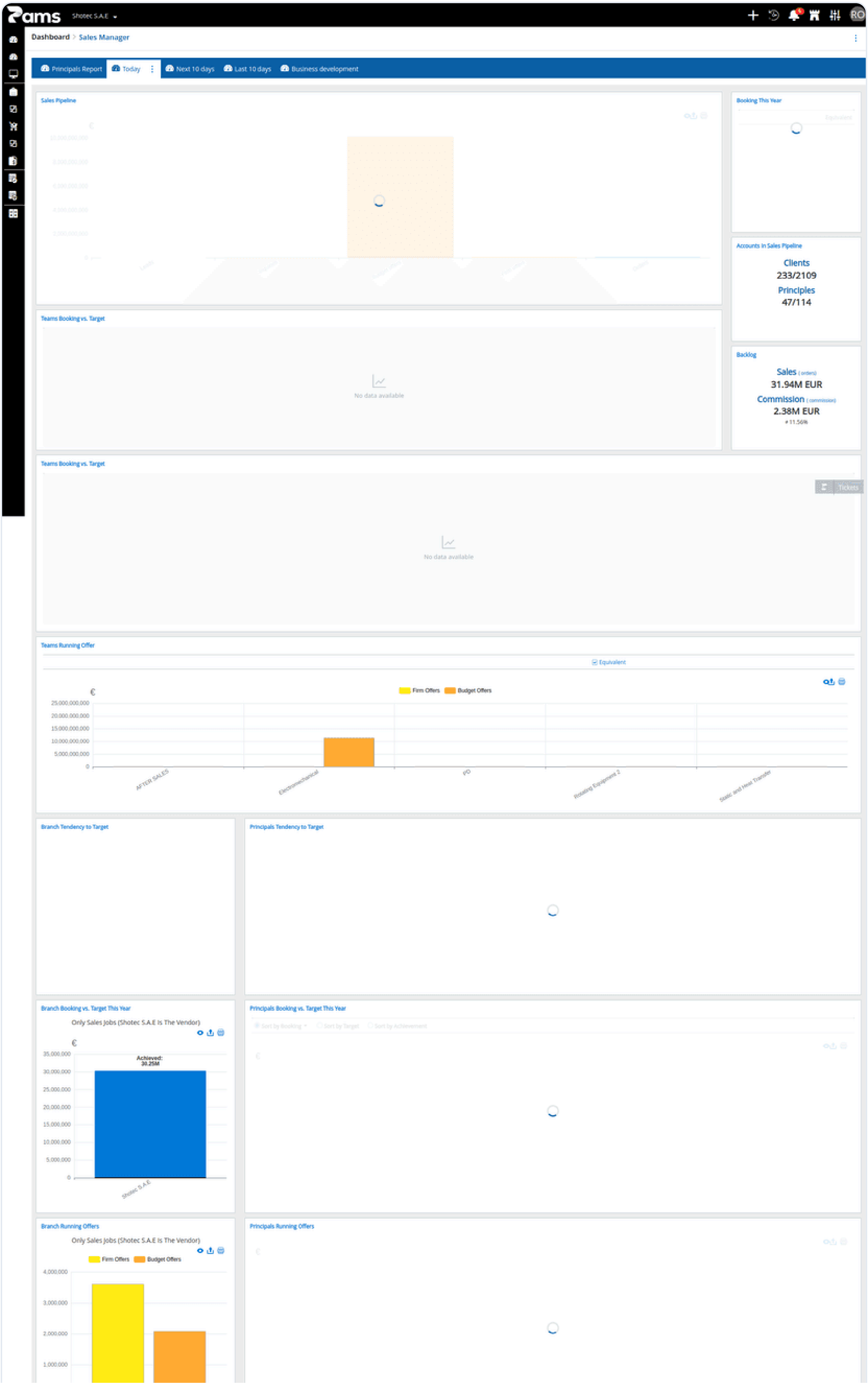
# Principal Dashboard

July 29, 2026

## Principal Dashboard

*Applications › Principal Dashboard*


ams
Shotec S.A.E
Dashboard > Sales Manager
Principals Report
Today
Next 10 days
Last 10 days
Business development
Sales Pipeline
Booking This Year
Accounts in Sales Pipeline
Clients
233/2109
Principles
47/114
Teams Booking vs. Target
No data available
Backlog
Sales
31.94M EUR
Commission
2.38M EUR
Teams Booking vs. Target
No data available
Teams Running Offer
Equivalent
Firm Offers
Budget Offers
€
25,000,000,000
20,000,000,000
15,000,000,000
10,000,000,000
5,000,000,000
0
AFTER SALES
Electromechanical
PD
Rotating Equipment 2
Static and Heat Transfer
Branch Tendency to Target
Principals Tendency to Target
Branch Booking vs. Target This Year
Only Sales Jobs (Shotec S.A.E Is The Vendor)
€
Achieved:
30.25M
35,000,000
30,000,000
25,000,000
20,000,000
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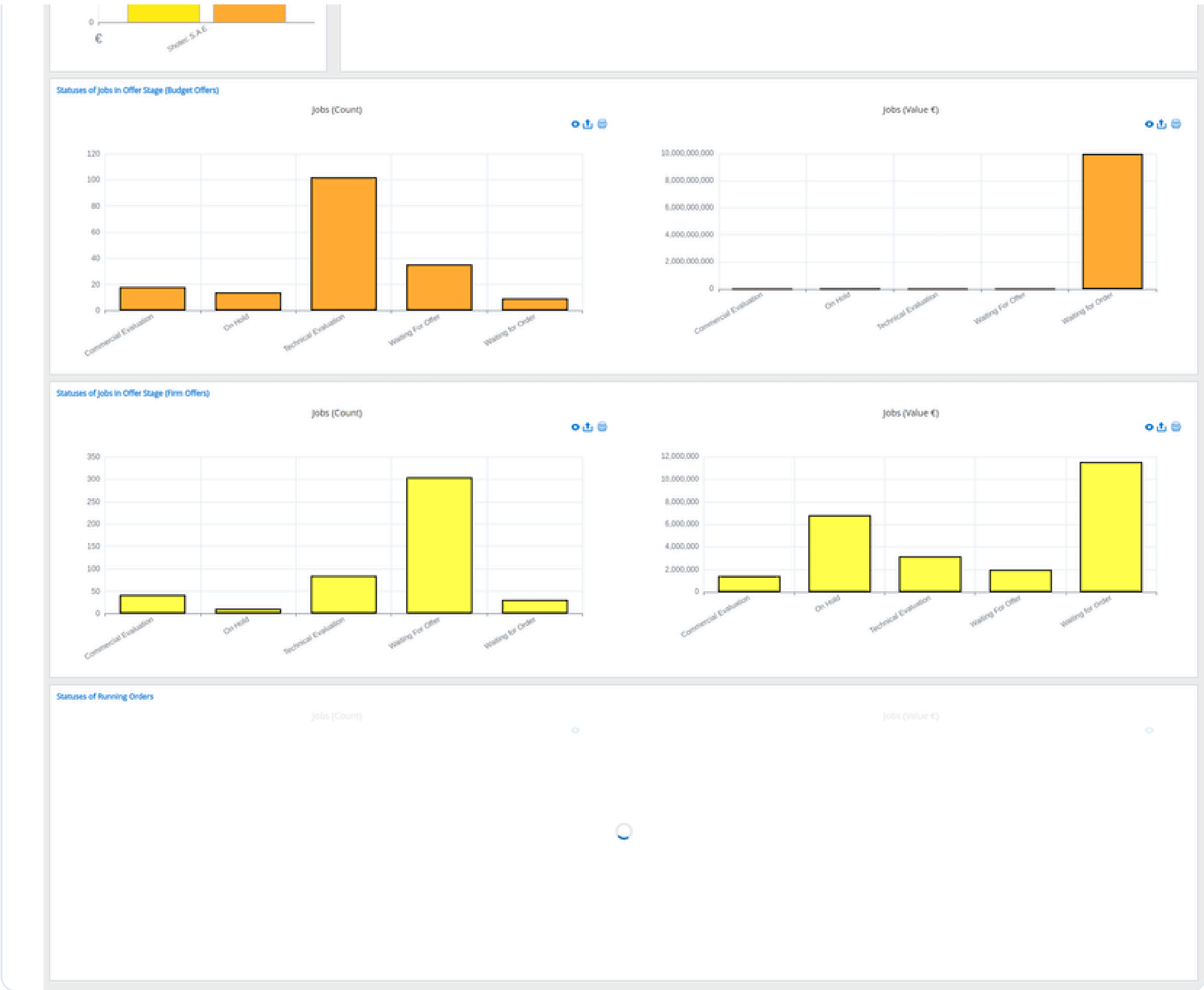
Shotec S.A.E
Principals Booking vs. Target This Year
Branch Running Offers
Only Sales Jobs (Shotec S.A.E Is The Vendor)
Firm Offers
Budget Offers
4,000,000
3,000,000
2,000,000
1,000,000
Principals Running Offers




*Principal Dashboard*

## Overview

The Principal Dashboard is the central workspace for accessing dashboard content and moving to operational areas such as Sales, PM, Purchasing, Warehouse, and Finance. Use it at the start of the day to review the dashboard relevant to your role, locate available widgets, and open the area required for your next task.

The dashboard also provides access to Tickets and supports adding files when the current dashboard action requires an attachment.

## Settings

Before using the dashboard, select the dashboard context and any available classification values displayed on the page. The available fields do not include explanatory help text, so use the values provided by your business for your role and vendor classification.

| Field | Use |
|---|---|
| roleDashboard | Select the dashboard role or dashboard context to display. |
| vendorType | Select the available vendor type value when it is relevant to the dashboard content. |
| Search for widget | Enter text to locate a widget. |
| files[] | Review the files associated with the current dashboard action. |

> **Note:** Only select values that apply to the work you are performing. The available screen information does not define how roleDashboard or vendorType values are maintained.

## Workflow

1. Open **Applications**, then open **Principal Dashboard**. Use the dashboard as the starting point for reviewing current work and accessing business areas.
2. **Choose the dashboard context.** Review **roleDashboard** and select the dashboard role appropriate to your current responsibilities. If a vendor classification is required for the information you need, select the applicable **vendorType**.

   > **Tip:** Confirm the selected dashboard context before searching for a widget. This helps you work in the intended view.

3. **Decide whether you need a specific widget or a business area.**
   - To find a dashboard widget, enter relevant keywords in **Search for widget**, then use **Select** to choose the available result.
   - To work in a functional area instead, use the relevant dashboard option: **Sales**, **PM**, **Purchasing**, **Warehouse**, **Finance**, **Tasks**, **Activities**, **Reports**, **My Desk**, or **Data**.
   - Use **Dashboard** to return to the dashboard workspace when you need to change focus.
4. **Decide whether today's information is required.** Select **today** when you need to work with the date option shown on the dashboard. Review the displayed dashboard content before continuing to another area.

5. **Decide whether ticket work is required.** Select **Tickets** when you need to access the ticket option available from the dashboard. Return to the dashboard when you need to continue with another operational area or widget.

6. **Attach supporting files when required.** Select **Attach**, choose the required file, and verify that it appears in **files[]**. Use this only when the current dashboard action requires supporting documentation.

   > **Warning:** Verify the selected file before completing the action. The screen identifies attached items through **files[]**, but does not provide additional file-status information.

7. **Confirm the current selection or action.** Select **Ok** when the dashboard presents it as the available confirmation action. If the selected dashboard context, widget, or attachment is not correct, revise the selection before confirming.

## Examples

A Project Manager begins the day by opening **Applications** and then **Principal Dashboard**.

1. The Project Manager selects the applicable **roleDashboard** value for project work. A **vendorType** value is selected only if it is relevant to the available dashboard context.

2. The Project Manager wants to locate a project-related dashboard item. They enter `project` in **Search for widget** and use **Select** to choose the appropriate available widget.

3. Before continuing, the Project Manager selects **today** to review the dashboard information available for the current date.

4. A supporting document is required for the current dashboard action. The Project Manager selects **Attach**, adds the file, and checks that it is listed in **files[]**.

5. The Project Manager selects **Ok** to confirm the current action. They then select **PM** to continue to project management work.

## Tips

> **Tip:** Use **Search for widget** when you know the type of dashboard content you need but do not want to browse through the available dashboard options.

> **Note:** Use **Dashboard** as the return point after working in another available area, such as **Sales**, **Purchasing**, or **Finance**.

> **Tip:** Use **Reports** for reporting work and **My Desk** for the work area identified by that dashboard option; select the option that matches the task you intend to perform.

## Troubleshooting

| Symptom | Likely cause | Fix |
|---|---|---|
| The required widget is not found. | The search text may not match the available widget, or the current **roleDashboard** context may not be appropriate. | Revise the text in **Search for widget**, review **roleDashboard**, and use **Select** again. |
| The displayed dashboard information is not relevant to the current task. | An unsuitable **roleDashboard** or **vendorType** value may be selected. | Review the available values in **roleDashboard** and **vendorType**, select the appropriate context, and then continue. |
| A supporting document is not visible. | The file may not have been attached to the current dashboard action. | Select **Attach** and verify that the document appears in **files[]** before selecting **Ok**. |
| You need to work in a different operational area. | The current dashboard item does not match the required business activity. | Select the applicable dashboard option, such as **Sales**, **PM**, **Purchasing**, **Warehouse**, or **Finance**. |

## Related pages

- Principal Dashboard — Overview
- Principal Dashboard — Learning Path