How To Use The Dashboard

Dashboard Overview

Your Dashboard is an overview of your business. This is the first thing that you will see when you log into the system. It will outline the progress and performance of your business. Here are the potential different parts of your default Dashboard:
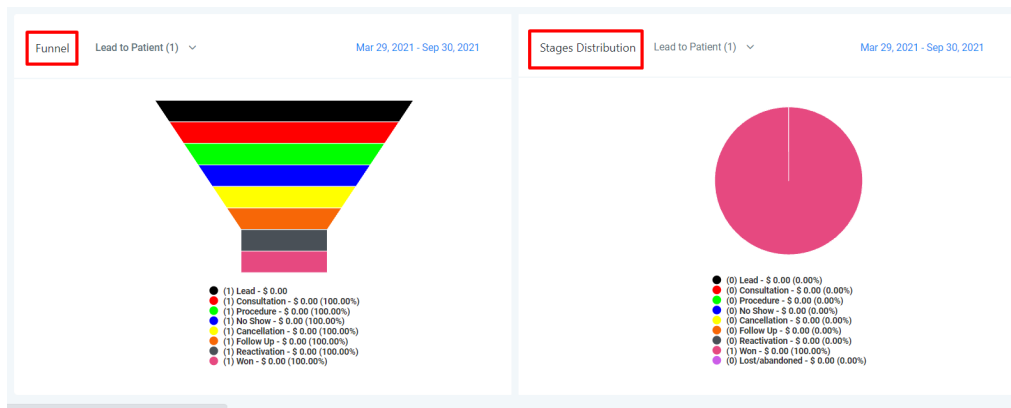
Row 1:

- **Opportunities**: Number of Leads in your Pipeline
- **Pipeline Value**: All your leads' total worth
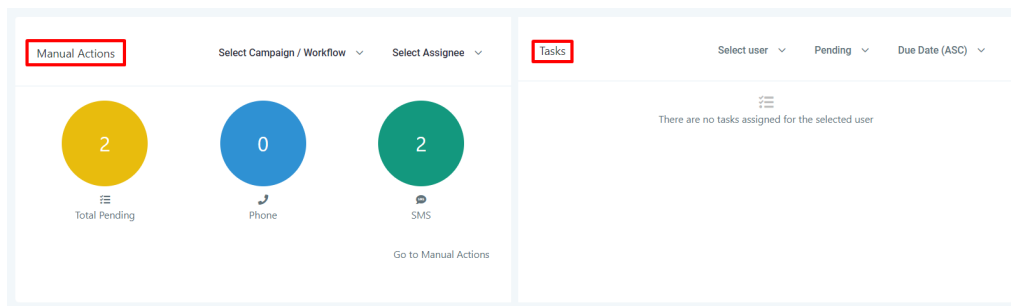- **Conversion Rate**: Percentage of your 'WON' leads/accounts

Row 2:

- **Funnel**: A visual representation of what stages your opportunities are within your Pipeline
- **Stages Distribution**: This is a cycle graph of your Pipeline

- (1) Lead - $ 0.00
- (1) Consultation - $ 0.00 (100.00%)
- (1) Procedure - $ 0.00 (100.00%)
- (1) No Show - $ 0.00 (100.00%)
- (1) Cancellation - $ 0.00 (100.00%)
- (1) Follow Up - $ 0.00 (100.00%)
- (1) Reactivation - $ 0.00 (100.00%)
- (1) Won - $ 0.00 (100.00%)

- (0) Lead - $ 0.00 (0.00%)
- (0) Consultation - $ 0.00 (0.00%)
- (0) Procedure - $ 0.00 (0.00%)
- (0) No Show - $ 0.00 (0.00%)
- (0) Cancellation - $ 0.00 (0.00%)
- (0) Follow Up - $ 0.00 (0.00%)
- (0) Reactivation - $ 0.00 (0.00%)
- (1) Won - $ 0.00 (100.00%)
- (0) Lost/abandoned - $ 0.00 (0.00%)

Row 3:

- **Manual Actions:** An overview of manual actions
- **Tasks:** A list of assigned tasks for one or all users within your account.

Manual Actions | Select Campaign / Workflow ⌄ | Select Assignee ⌄   Tasks | Select user ⌄ | Pending ⌄ | Due Date (ASC) ⌄

2 Total Pending   **0** Phone   **2** SMS

There are no tasks assigned for the selected user

Go to Manual Actions

Row 4:

- **Lead Source Report:** Here you can see where your leads came from and what their values are.

Lead Source Report   Mar 29, 2021 - Sep 30, 2021

Source	Total Leads	Total Values	Open	Won	Lost	Win %
Form 15	2	$3,250.00	2	0	0	0%