

Using Dashboards

ACT! Dashboards give you the input necessary to “drive” your business using graphically-oriented panels. Each panel is designed to offer an at-a-glance overview of key activities and opportunities.

Dashboards are used to track your own key performance indicators. If you are using the Premium version of ACT!, Dashboards can provide a view of opportunities and activities of all (or selected) users of the database, thus providing a company-wide snapshot of performance.

Premium

Displaying Dashboard Views

Three Dashboards (Default, Activities, and Opportunities) ship with ACT!, but more can be added. Each Dashboard window can display summary lists, charts, or gauges. From within each Dashboard, you can

- ✓ quickly display the records that make up the components,
- ✓ easily create new calls, meetings, or to-dos, or add details to existing opportunities,
- ✓ identify how you’re tracking toward your goals using benchmarks and summary information, and
- ✓ copy any Dashboard component or the entire ACT! Dashboard to any application including Microsoft® Office applications for use in e-mails, reports, presentations, and more.

...view a Dashboard

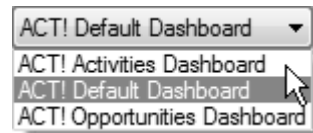
How To...

1. Click the **Dashboard** icon in the Navigation bar at the left.



The Dashboard view displays.


2. To change to a different view, click the Dashboard Layout button in the upper-right of the screen and select a view.



Dashboards will not include data that you don't have access to (Private or Limited Access data).

Practice: Viewing a Dashboard

Try It...

Step	What to do	How to do it/Comments
1.	Display the Dashboard view.	Click the Dashboard icon.  Dashboard