# Customize The Home Page Dashboard

This article applies to:

Max Classic

Your browser does not support HTML5 video.

# Dashboard

When you sign, you will see your home page dashboard. You can add reports and activity widgets to create a custom dashboard. The home page dashboard should display the information you need and provide direct navigation links to specific role-related lists and reports.



# Main Navigation Menu

When you click on the menu icon, the main navigation menu is displayed. The main navigation menu is comprised of several columns to help you find something fast. Although most people spend their time in a specific area (e.g. Marketing), the main nav allows you to jump to another area quickly.

Please click to open the n My Nav	CRM	Marketing	E-Commerce	Admin
G Start Page	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
	Companies	Email & Broadcasts	Orders	Billing & Account Info
Y-	Opportunities	Lead Generation	Products	Users
Customize Now	Referral Partners	Templates	Actions	Import Data
	Visitors	Dynamic Content	Promotions	Data Cleanup
	Zapier Integrations	Legacy	Legacy	

Pro-Tip! What columns are displayed is restricted by user permissions

#### Area Nav

Each system area (CRM, Marketing, E-Commerce, and Admin) has a matching area nav with additional drop-down menu options. The area nav allows you to perform multiple tasks (or work the whole day) in the same area of the system.



# To Add a New Widget

Create your own widgets for quick access to the data you need. Any widgets using custom reports are limited to 10,000 line items.

1. Go to the home page dashboard by clicking the ellipses and select Add Widgets

Zapie	er Integrations	Reports 🗸	Settings	
			Add Widgets	վա
Ì	Calenda	r Items	Change Layout	
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2. Click the Add to Dashboard button next to the widget you want to use.

	+ Add to dashboard
	U
web form, and more.	+ Add to dashboard

# List of Available Dashboard Widgets

### Campaign Reporting

This widget allows you to view high-level statistics on a campaign that you choose from a drop-down. In the example below, you can see how many contacts filled out the "Time Off Request Form" and how many times tags were applied. Please note that the campaign needs to be published in order to show up in the drop-down.

# All Email Stats

This widget displays summary statistics for email activity.

# **RSS** Feed

This widget allows you to add an RSS Feed to your home page. By default, it links to the InfusionBlog, but you can Edit the RSS link to customize the feed. Add the widget more than once if you'd like to see multiple feeds. Click on Edit to change the feed URL. Click here to learn how to get an RSS feed from most websites.

# Email

The email widget is designed to help you send your first email broadcast. Once you have sent your first broadcast, the widget will "unlock" and present you with detailed reporting on the last 5 email broadcasts you have sent. Just select the broadcast from the drop-down at the top.

# Calendar Items

This widget displays daily appointments and provides access to past and future appointments. If your user permissions allow, you can also view appointments assigned to other users.

# **Custom Statistics**

This widget displays custom report summaries on your Home Page. It can display the number of records in a

particular list, the sum or average of a column on a report, and more. You must first create a saved search before using this widget. This widget displays numerical summaries, but you can easily click through to view list or report details. Click on **Rename** to customize the box name. Click on **Add another stat** to add another stat to the widget.

#### Pro-Tips!

The Custom Statistics widget is the only widget that can be shared with another user. Only an admin can share the widget.

If an admin deletes the widget, it will be removed from everyone's dashboard





1	Remove Widget ×	
	Are you sure you want to remove this shared widget? It will also be removed from <b>2</b> users' dashboards.	beer
	Yes	ent

**Pipeline Stages** 

Provides a count of how many contacts are currently in each of your sales stages. Full list views are available by clicking on each stage.

Pro-Tip! The ability to view stats by user is only available to users with the Admin role.

Pipeline Stages	
View Stats for:	
All Users	
All Users	
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Orange Blossom Auto Glass	<ul> <li>Image: A start of the start of</li></ul>
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#### Tasks

Allows quick access your daily tasks directly from your dashboard.

Saved Search or Saved Report

This widget displays the first 20 individual records on a particular list or report. You can click View all results to see the full list or report.

#### **Usage Stats**

This widget displays system activity so you can see the total number of user sign-ons, broadcasts, active web forms, and more.

# Contacts

The Contact widget is designed to help you add contacts and provide you insight into your list(s). If you haven't added contacts yet, the widget will be displayed on your dashboard by default. Once you add contacts, the widget

will "unlock" and provide you with quick access to your contacts. You also have the option to swap out the default 'all contacts' numbers with a number from a specific tag. To filter by tag, just type the tag name at the top of the widget.

Contacts Ø Type to filter by tag	<i>C</i> 🗇
O new contacts in the last 30 days ~	211 Total contacts
Add a Contact Import List	

# All Sales

The All Sales widget gives you a quick view of orders and sales made for the month, year, or quarter. Once an order is recorded, the widget will "unlock" and display dollar amount of sales, month-to-date. You can also place a manual order from this widget.

All Sales		8 D
Your sales this month have decreased by <b>1%</b>	\$0 Total sales	
Add an order		

# Fulfillment Jobs

This widget displays all of the fulfillment jobs assigned to you. Click on a link to access the job details and related documents (spreadsheets, labels, letters, etc.). Once viewed, the fulfillment jobs are put into "Processing" status until you mark them as complete.

# **Recent Activity**

This widget displays a stream of activity, similar to popular social media streams. It will show you when someone fills out a web form, opens an email, clicks a link, and more. Activities are grouped on a per-person basis. Click on

the arrow to expand the display to view all activities.

# User Toolbar

The user toolbar menu provides access to organization, customization, and information tools.

• Home - This section gives you access to check email, create and manage tasks and appointments, as well as upload or access company or personal files.



• **Recently Viewed** - This displays a list of the last few pages a user has viewed. It provides a quick way to navigate back to one of them.

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		🗹 Just a test task	
		🗹 Task 2-19-2020	🖞 Calendar Item

• **My Favorites** - This menu is customizable. Click on Edit to add a link. This is a great way to add links to external websites you frequent throughout the day (e.g. company blog, facebook, or twitter.)

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• Marketplace - You can download free campaigns, check out various 3rd-party integrations, and connect with a certified Keap Consultant.

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• My Profile - This menu gives you access to customize you profile, preferences, and email signature.

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	Manage Accounts			
	Log Out			
	Your Accounts	_		
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• Help - Read articles and watch videos in the Help Center. Stuck? Ask questions and participate in the Keap Community.

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• Search - From this area, you can search for a specific record by name or ID number. Use the drop-down to select a different item to search for.

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	Carson Stevenson (747) @ligula.com	-
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• Contact Quick-Add - Quickly add new contacts to Keap.

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	First Name Last Name	
<i>C</i> 🗊	Email	