

Sales Pipeline Dashboard

This article applies to:

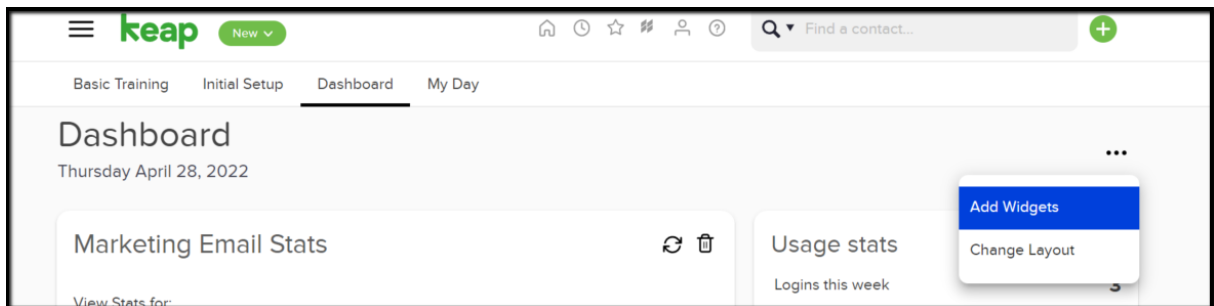
Each sales person can add the Pipeline Stages widget to their dashboard and select which stages they want to monitor.

□

1. Go to your dashboard by clicking the **home** icon button on the toolbar

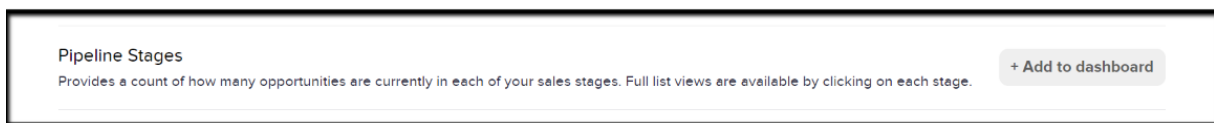
□

2. Click the **Add Widgets** button



□

3. Scroll down and click the **Add to Dashboard** button next to the Pipeline Stages section



□

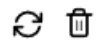
4. Once the widget is on your dashboard, you can click **Settings** to select or deselect stages you want to monitor.

□

Dashboard

Thursday April 28, 2022

Pipeline Stages



Hi speed	0
Working	1
Follow up email	1
Closing	0
Won	0
Lost	0
New Opportunity	0
Contacting	1
Win	0

[Settings](#)

Contacting	<input checked="" type="checkbox"/>
Win	<input checked="" type="checkbox"/>

Widget Title

Pipeline Stages

[Edit Pipeline](#)

Cancel

Save

Multiple Pipelines

You can add multiple pipeline widgets to your dashboard if you have separate sales processes for different products and services.

