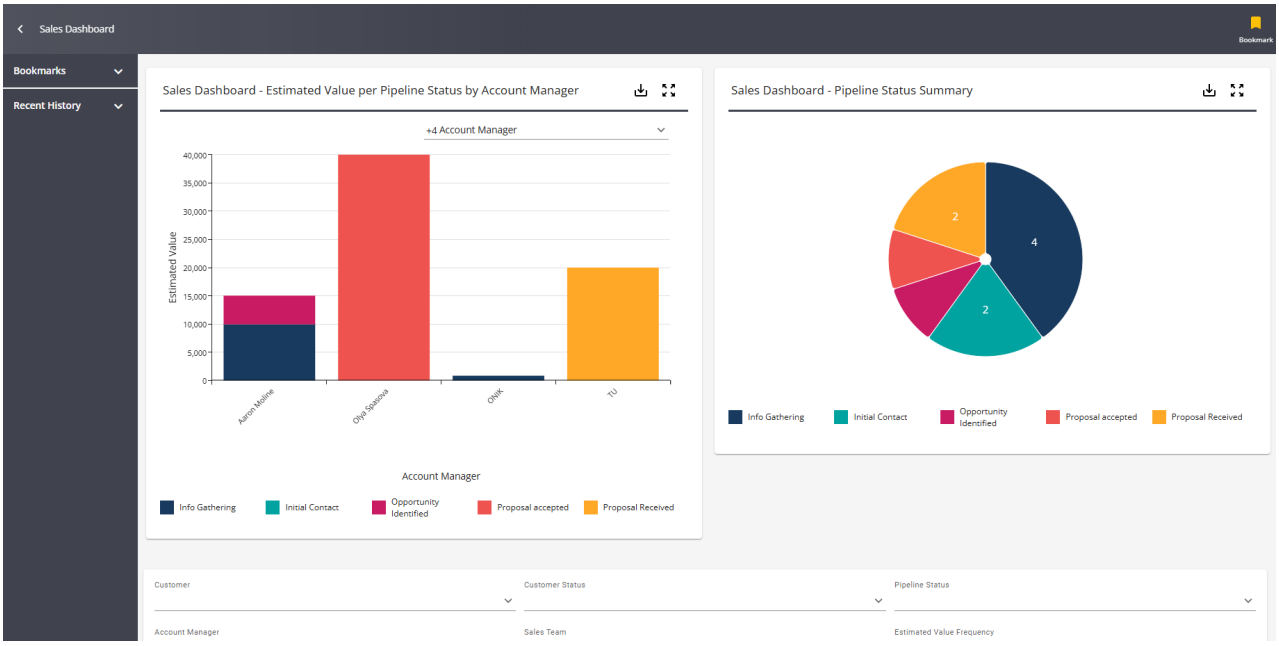
# Beyond - Sales Pipeline Dashboard

Last Modified on 09/18/2025 9:38 pm CDT

## Overview

With the Sales Pipeline Dashboard, you will receive a real-time overview of your Prospect customers and their current Pipeline Status. With this information provided in a clear and easy to understand manner, this will lead to efficient decision-making, enhanced productivity, and increased revenue due to streamlined workflows and quicker placements.




*Note* The data presented within the Sales Dashboard is related to the hierarchy you are at within Beyond.

## Security Permissions

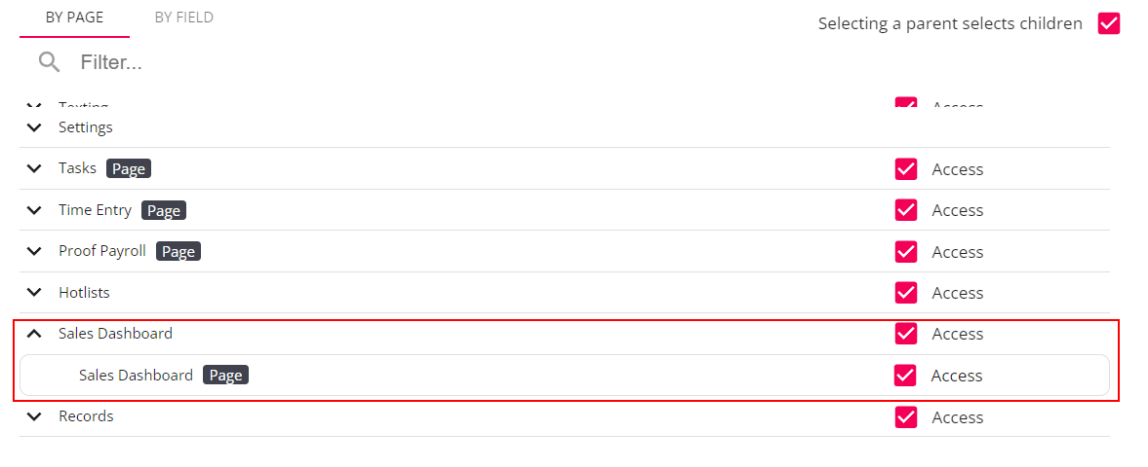
To access/view the insight widgets that are presented within the Sales Dashboard, users will need to have access to the following insight widgets within their respective Insight Widget Security Group via B Menu > System Settings > Security > Insight Widgets:

- Sales Dashboard - Estimated Value per Pipeline Status by Account Manager
- Sales Dashboard - Pipeline Status Summary

*Note* The above two permissions are enabled by default within the “Tempworks Default - All Insight Widgets” Security Group.

The insight widgets can also be added to any other Insight Widget Security Groups that are required by your processes.

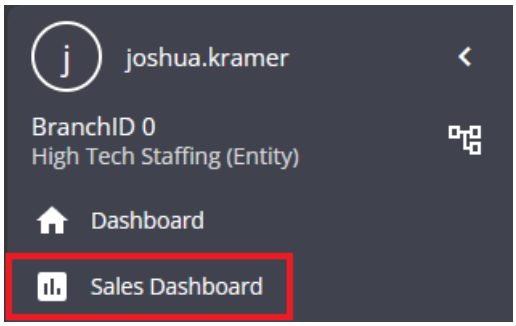
*Note* If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Sales Dashboard" page to the Security Groups that require the functionality:




For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "Beyond - Creating Security Groups with Advanced Permissions".

# Utilizing the Sales Dashboard

Navigate to B Menu > Sales Dashboard:




Within the Sales Dashboard, you will see the insight widgets along with search parameters to find specific customer prospects.

*Note* To ensure the dashboard is showing the prospect data as intended, it is highly recommended that best practices are being followed when creating/managing customer records. This includes but is not limited to:

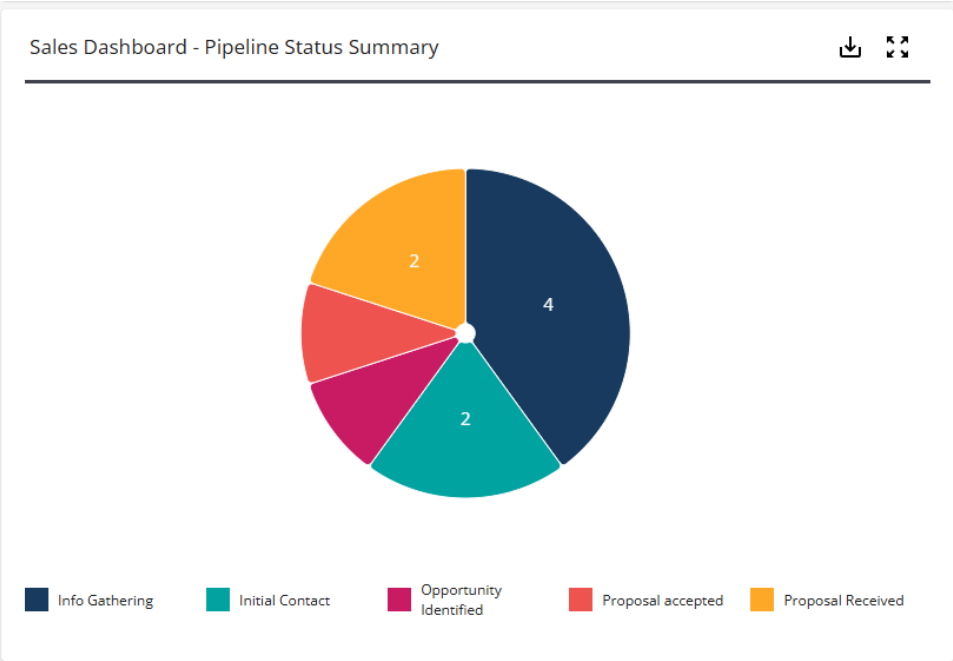
- Adding the intended Account Manager to the customer record via Customer > Visifile > Sales

Information > Account Manager

- Maintaining the intended Sales Pipeline Status via Customer > Visifile > Sales Pipeline > Pipeline Status
- Updating the customer status once the customer is no longer a prospect via Customer > Visifile > Snapshot > Status

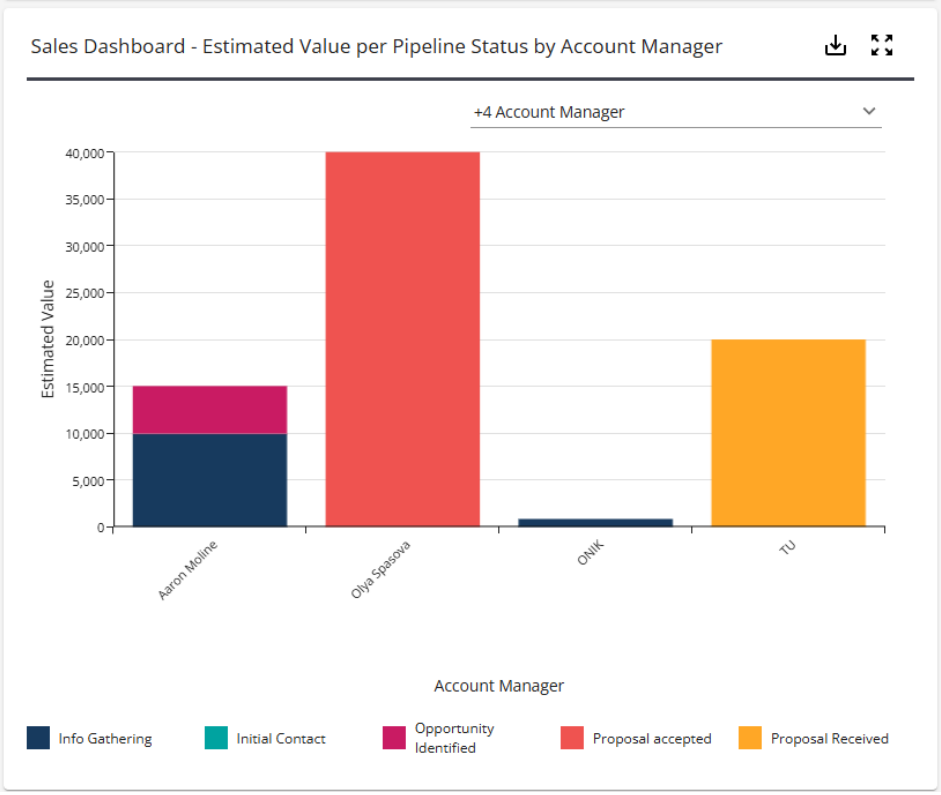
### Pipeline Status Summary

Shows, at a glance, the amount of prospect customers within specific Sales Pipeline statuses.



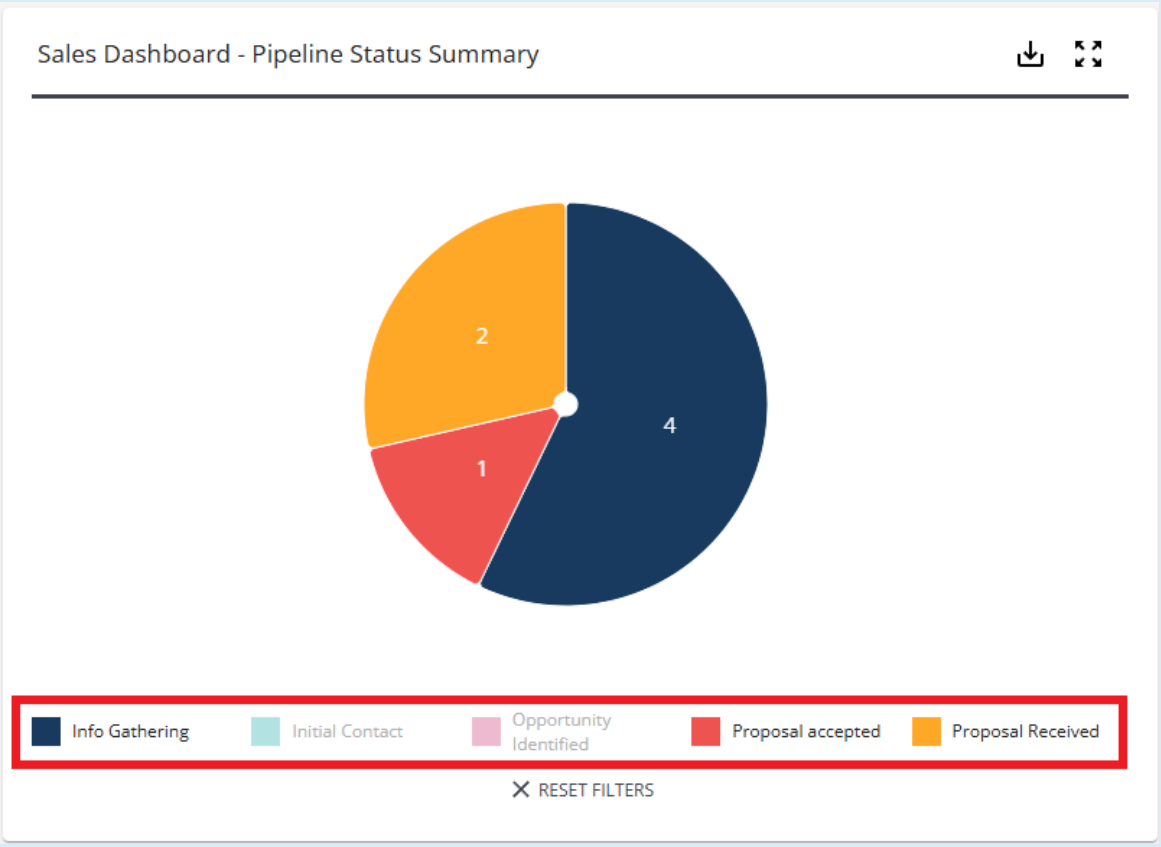

### Estimated Value per Pipeline Status by Account Manager

Shows, at a glance, the estimated value of prospect customers per specific Sales Pipeline statuses.



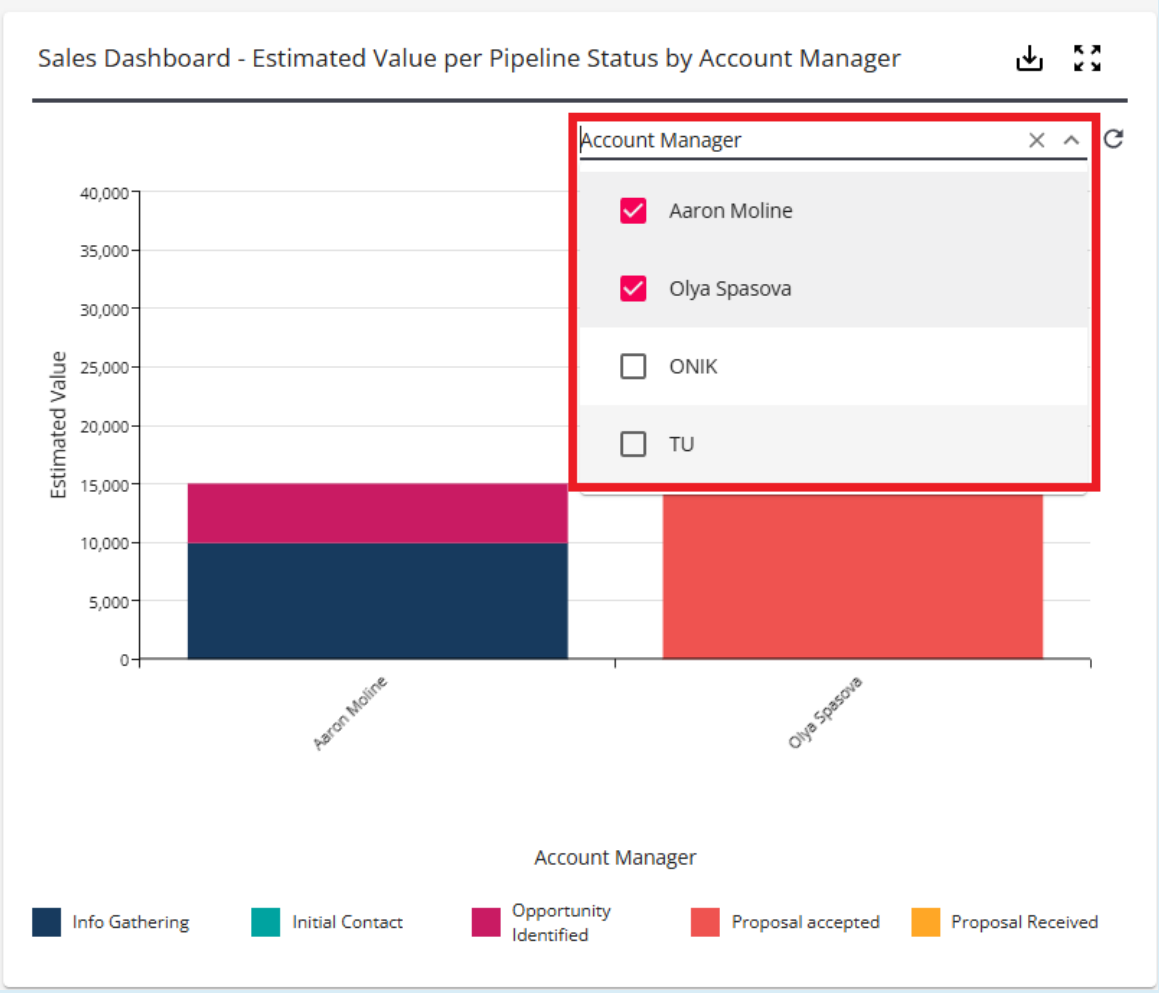

*Note* The following filtering options are available within the Sales Dashboard:

- Both charts within the Sales Dashboard are able to be filtered by selecting items within the Legend:

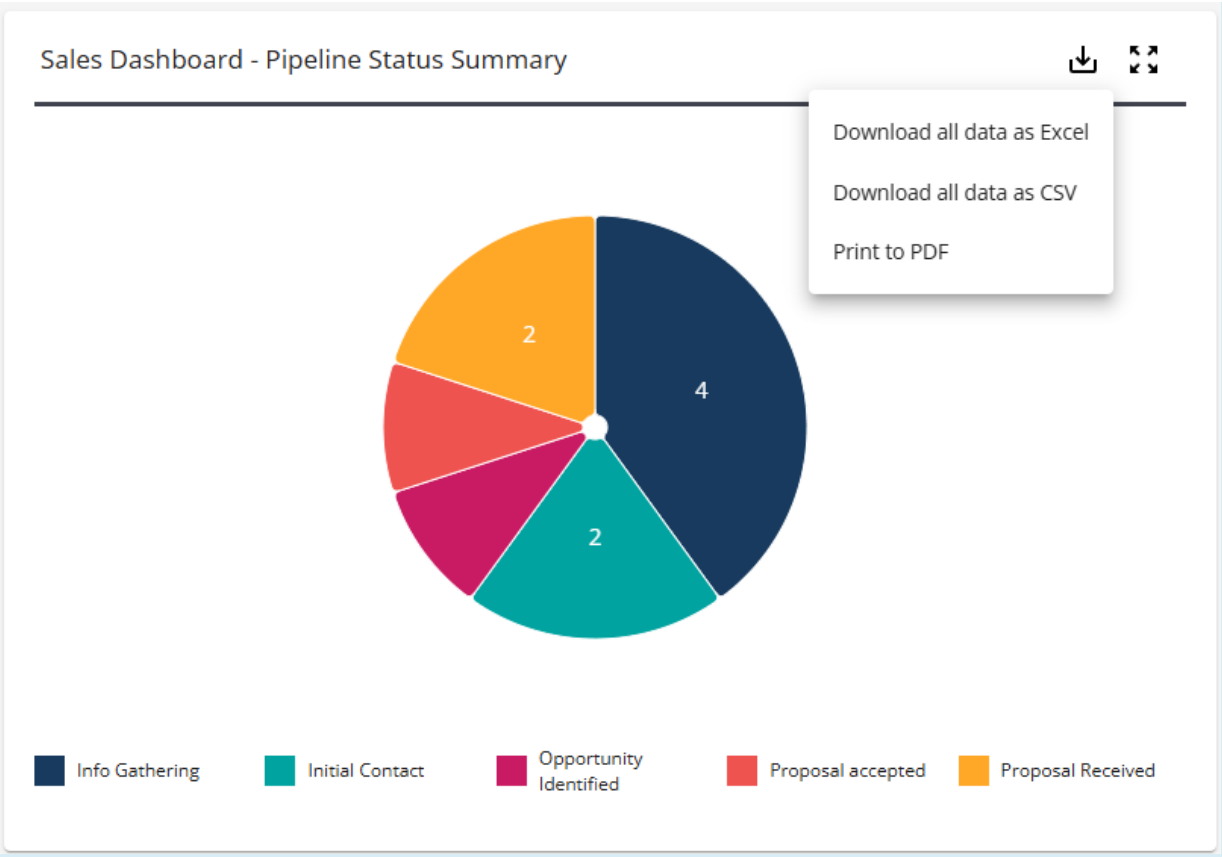



- The "Estimated Value per Pipeline Status by Account Manager" bar chart is also able to be filtered by the

values within the x-axis via the dropdown:




*Note* Data within the charts are able to be exported to PDF, Excel, or CSV via the button at the top right of the widget:

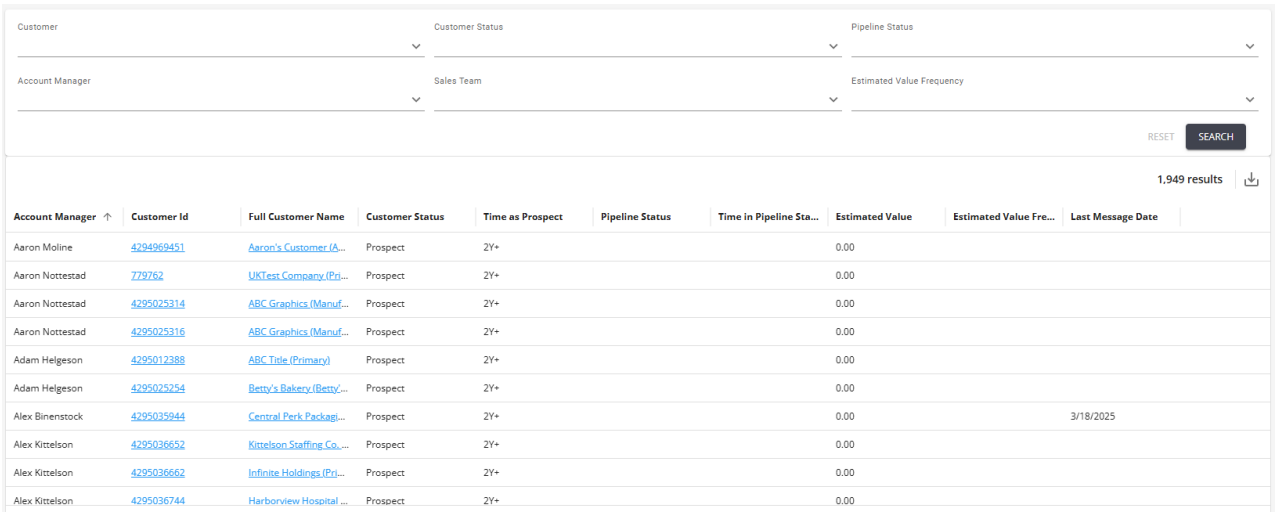



- Exporting as a PDF will export the data as an image of the widget as it is presented.
- Exporting as an Excel or CSV file will export **all** of the data, regardless of filters selected within the widget.

**Prospect Searching**

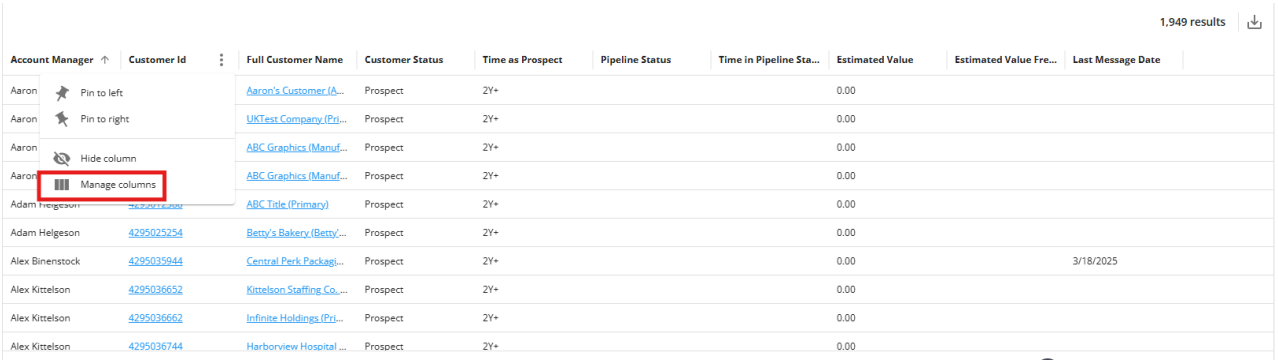
You can utilize the following search parameters to identify specific prospects:

- Customer Status
- Pipeline Status
- Account Manager
- Sales Team
- Estimated Value Frequency




| Account Manager | Customer Id | Full Customer Name | Customer Status | Time as Prospect | Pipeline Status | Time in Pipeline Sta... | Estimated Value | Estimated Value Fre... | Last Message Date |
|---|---|---|---|---|---|---|---|---|---|
| Aaron Moline | 4294969451 | Aaron's Customer (A... | Prospect | 2Y+ | | | 0.00 | | |
| Aaron Nottestad | 779762 | UKTest Company (Pri... | Prospect | 2Y+ | | | 0.00 | | |
| Aaron Nottestad | 4295025314 | ABC Graphics (Manuf... | Prospect | 2Y+ | | | 0.00 | | |
| Aaron Nottestad | 4295025316 | ABC Graphics (Manuf... | Prospect | 2Y+ | | | 0.00 | | |
| Adam Helgeson | 4295012388 | ABC Title (Primary) | Prospect | 2Y+ | | | 0.00 | | |
| Adam Helgeson | 4295025254 | Betty's Bakery (Betty'... | Prospect | 2Y+ | | | 0.00 | | |
| Alex Binenstock | 4295035944 | Central Perk Packagi... | Prospect | 2Y+ | | | 0.00 | | 3/18/2025 |
| Alex Kittelson | 4295036652 | Kittelson Staffing Co. ... | Prospect | 2Y+ | | | 0.00 | | |
| Alex Kittelson | 4295036662 | Infinite Holdings (Pri... | Prospect | 2Y+ | | | 0.00 | | |
| Alex Kittelson | 4295036744 | Harborview Hospital ... | Prospect | 2Y+ | | | 0.00 | | |

You can also select the ⋮ to the right of any column and select "Manage Columns" to select additional columns:




| Account Manager | Customer Id | Full Customer Name | Customer Status | Time as Prospect | Pipeline Status | Time in Pipeline Sta... | Estimated Value | Estimated Value Fre... | Last Message Date |
|---|---|---|---|---|---|---|---|---|---|
| Aaron | | Aaron's Customer (A... | Prospect | 2Y+ | | | 0.00 | | |
| Aaron | | UKTest Company (Pri... | Prospect | 2Y+ | | | 0.00 | | |
| Aaron | | ABC Graphics (Manuf... | Prospect | 2Y+ | | | 0.00 | | |
| Aaron | | ABC Graphics (Manuf... | Prospect | 2Y+ | | | 0.00 | | |
| Adam Helgeson | | ABC Title (Primary) | Prospect | 2Y+ | | | 0.00 | | |
| Adam Helgeson | 4295025254 | Betty's Bakery (Betty'... | Prospect | 2Y+ | | | 0.00 | | |
| Alex Binenstock | 4295035944 | Central Perk Packagi... | Prospect | 2Y+ | | | 0.00 | | 3/18/2025 |
| Alex Kittelson | 4295036652 | Kittelson Staffing Co. ... | Prospect | 2Y+ | | | 0.00 | | |
| Alex Kittelson | 4295036662 | Infinite Holdings (Pri... | Prospect | 2Y+ | | | 0.00 | | |
| Alex Kittelson | 4295036744 | Harborview Hospital ... | Prospect | 2Y+ | | | 0.00 | | |

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