Pipeline Intelligence — Dashboard Labeled Guide

Product: Pipeline Intelligence CRM
Page: Dashboard (workspace home)
Audience: Reps, managers, and workspace admins

This guide explains every labeled area on the Dashboard screen. Numbers (**A1**, **D3**, etc.) match the reference tables below for training and onboarding.

Quick orientation

The Dashboard is your **workspace command center**. It answers:

- How much pipeline do we have vs goal?
- How much revenue is booked?
- Which accounts need attention today?
- How is pipeline spread across stages, reps, and regions?
- What do live AI signals say about key accounts?

Scope matters: Use **My pipeline** to see only deals assigned to you, or **Team** to see the whole workspace (admins and managers).

A. Global header (all pages)

#	Label	What it does
A1	Workspace name | PIPELINE INTELLIGENCE	Your company brand and product title
A2	Notification bell	Alerts (e.g. at-risk account count)
A3	REPORTS	Opens the Reports hub — weekly pack, exports, scheduled email
A4	+ ADD	Create a new account or opportunity
A5	User menu (name · plan)	Profile photo, light/dark mode, Admin Panel, import/export, sign out

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B. Main navigation

#	Tab	Opens
B1	CALENDAR	Follow-ups, close targets, tasks, external calendar subscription
B2	DASHBOARD	This page — workspace snapshot (**active** when highlighted)
B3	FUNNELS	Kanban board — drag deals between pipeline stages
B4	ALL ACCOUNTS	Searchable list of every account
B5	TEAM VIEW	Rep goals, revenue quotas, team rollups
B6	ANALYTICS	Charts and trend analysis
B7	RISK	Full at-risk register with scores and signals

On smaller screens, a bottom navigation bar shows shortened labels (e.g. Dash, Funnel).

C. Dashboard context bar

Directly under the navigation tabs.

#	Element	Meaning
C1	Workspace snapshot · Mon YYYY	Data period and scope badge. Shows **My pipeline · ...** when filtered to you
C2	MY PIPELINE / TEAM toggle	**My pipeline** = your assigned deals only. **Team** = entire workspace
C3	View all accounts	Shortcut to the All Accounts list
C4	CRM dossiers (sparkle badge)	Current intelligence source. Becomes live AI after you run **Refresh intel**
C5	Live intel on demand — Refresh intel below	Reminder that AI signals are manual refresh, not automatic

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D. KPI row (eight cards)

The top row of metric cards. **Click any card** (except Booked revenue) to open a detail modal with account lists.

#	Card	Primary number	Subtext / bar

D1	PIPELINE GOAL	Total $ in active pipeline stages	Progress bar vs your goal (My) or team goal (Team). Example: $1.9M at 95% of $2,000,000 team goal
D2	BOOKED REVENUE	Closed-won dollars	Closed won · YTD (Team) or your quota period (My). Shows % of quota when goals are set
D3	ACTIVE DEALS	Count of deals in active stages	May note accounts silent >21 days (no logged activity)
D4	TIER 1 ACCOUNTS	High-priority tier-1 accounts still active	Classified tier 1 · active
D5	AT-RISK FLAGGED	Accounts in the open risk queue	Shows critical count when applicable
D6	OVERDUE ACTIONS	Follow-ups whose date is before today	Follow-ups past due
D7	TOP SEGMENT	Count in your largest industry segment	e.g. 2 · Medical Device · active
D8	AVG DAYS SILENT	Average days since last touch on flagged accounts	Shows — when no accounts are flagged

Chevron (›) on a card indicates it is clickable.

How goals are set

- **Rep pipeline goal** and **revenue quota**: Admin Panel → User accounts, or Team View
- **Team rollup**: Sum of rep goals when **Team** scope is selected

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E. Urgent actions & overdue (left panel)

#	Element	Purpose
E1	URGENT ACTIONS & OVERDUE	Highest-priority at-risk accounts
E2	Double-click account name to open details	Opens the account dossier modal
E3	PRIORITIZE ALL	Opens the full Risk tab
E4	Risk cards (when listed)	Company name, risk score, state/tier, and signal pills (overdue, silent, etc.)
E5	No urgent items in the risk queue	Empty state — nothing currently flagged as urgent

Each risk card shows up to three **signal pills** explaining why the account was flagged.

F. Sales by team (right panel)

Visible when **Team** scope is selected and you have team analytics access.

#	Element	Meaning
F1	SALES BY TEAM	Active pipeline broken down by rep
F2	Rep row	Display name, **Admin** badge if workspace admin, avatar initials
F3	N accounts · $X	Active deal count and total pipeline value for that rep
F4	Purple progress bar	Visual share relative to the largest rep pipeline
F5	Full team overview →	Opens Team View for goals and roster editing

Reps with no assigned deals show **0 accounts · $0**. Unassigned deals appear as an **Unassigned** row.

G. Pipeline distribution (wide panel, lower left)

#	Element	Meaning
G1	PIPELINE DISTRIBUTION	Deals grouped by funnel stage
G2	Stage name (e.g. New, Proposal)	Colored to match the Funnels board
G3	Horizontal bar	Relative number of deals vs the busiest stage
G4	Count	Number of accounts in that stage
G5	Dollar total	Sum of estimated pipeline value in that stage

Stages follow your workspace vocabulary (custom stages appear if configured in Admin).

H. Sales by region (lower right)

#	Element	Meaning
H1	SALES BY REGION	Pipeline grouped by state/region on each account
H2	Region code (e.g. MD, CA)	From the account State / Province field
H3	Bar · count · $	Account count and total pipeline $ per region

If no region is set on accounts, a helper message prompts you to add state on each prospect.

I. Workspace health (below region)

#	Metric	Meaning
I1	Risk pressure	Percentage of active deals that are flagged at-risk — **lower is better**. Click opens Risk tab
I2	Pipeline quality	Percentage of active deals with an estimated value entered — **higher is better**

Bar colors: green (healthy), amber (watch), red (needs attention).

J. Live AI pipeline intelligence (scroll down)

#	Element	Purpose
J1	LIVE AI PIPELINE INTELLIGENCE	AI-enriched signals for top accounts
J2	Refresh intel	Runs live web search (uses monthly intel quota on Growth+ plans when search succeeds)
J3	Generate digest	Opens the weekly digest report builder
J4	Signal cards	Company narrative, optional products/facilities/approvals highlights, link to open dossier
J5	View full at-risk analysis →	Shortcut to the Risk tab

Before refresh, signals are built from **CRM dossiers** (saved strategy and account data). After refresh, live search may enrich them.

K. Footer note

#	Text	Meaning
K1	KPIs use CRM data. Click Refresh intel...	Top KPIs are always from CRM records; live AI is optional and on-demand

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L. Help & support

#	Element	Purpose

L1	Floating help button (bottom-right)	In-app assistant and feedback when enabled

Interactions cheat sheet

Action	Result
Click KPI card	Detail modal with filtered account list
Double-click account name	Open account dossier
Toggle My pipeline / Team	Recalculate all KPIs and charts for that scope
PRIORITIZE ALL or Risk pressure bar	Open Risk tab
Refresh intel	Fetch live AI signals (quota applies)
View all accounts	Open All Accounts
Full team overview	Open Team View

Glossary

Term	Definition
Active deal	Opportunity in an open pipeline stage (not Closed, Lost, or Inactive)
Silent	No activity logged for 21+ days
Tier 1	Highest account priority classification on the Details tab
Pipeline goal	USD target for open pipeline assigned to a rep or team
Booked revenue	Closed-won amount recorded on deals
At-risk flagged	Account matched by risk rules (overdue, silent, stage stall, etc.)
Segment	Industry / vertical tag on the account

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