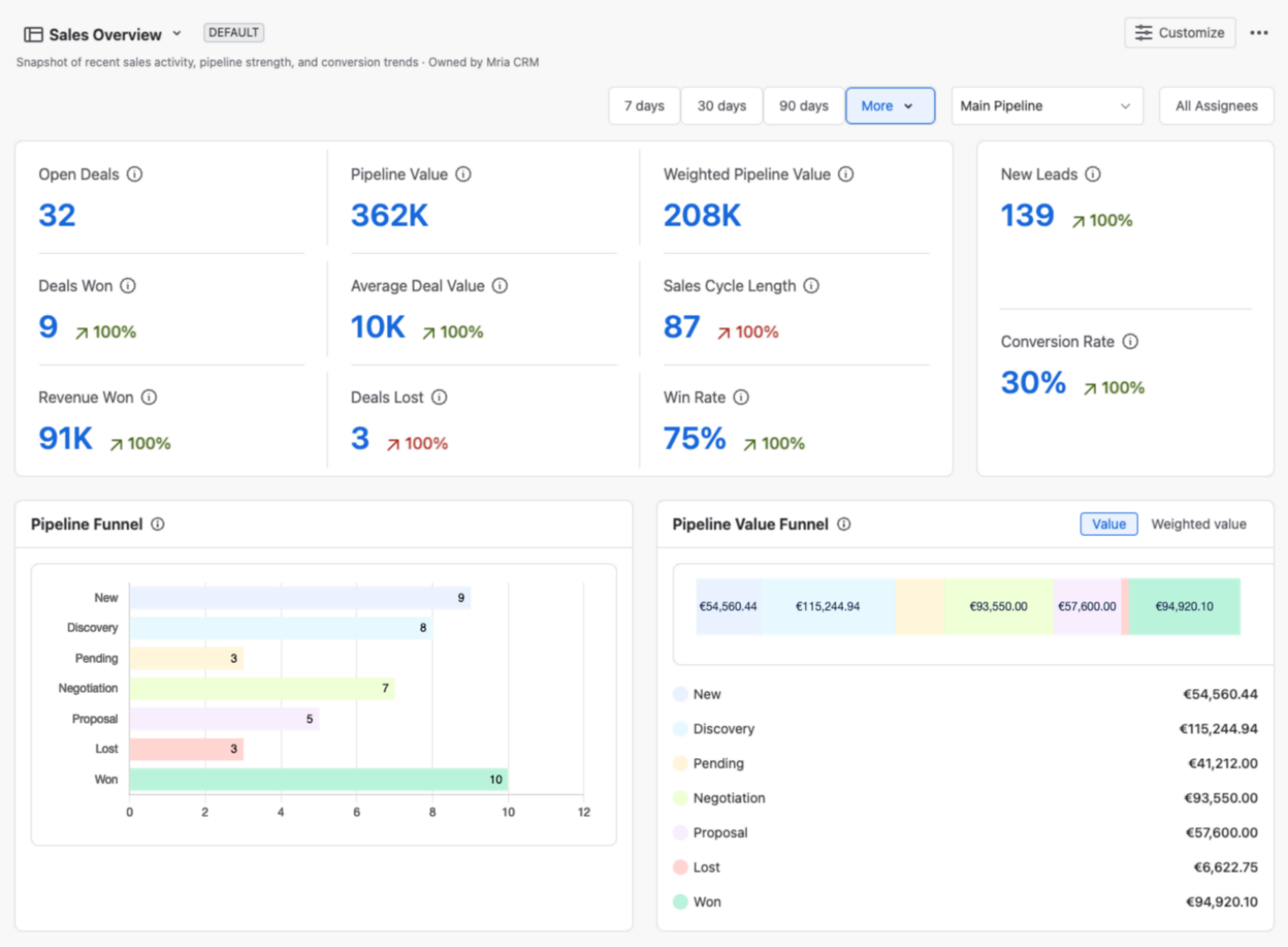
Dashboards

Using Mria CRM · https://mriacrm.com/docs/dashboards/

Dashboards: the numbers you check, arranged your way

Dashboards turn your Leads, Deals, Contacts and Companies into KPIs, funnels, charts and short lists. Everyone starts on **Sales Overview**, the built-in dashboard. Beside it you can build your own — a rep's Monday view, a manager's team review, a forecast for leadership — and share them with the people who need them.

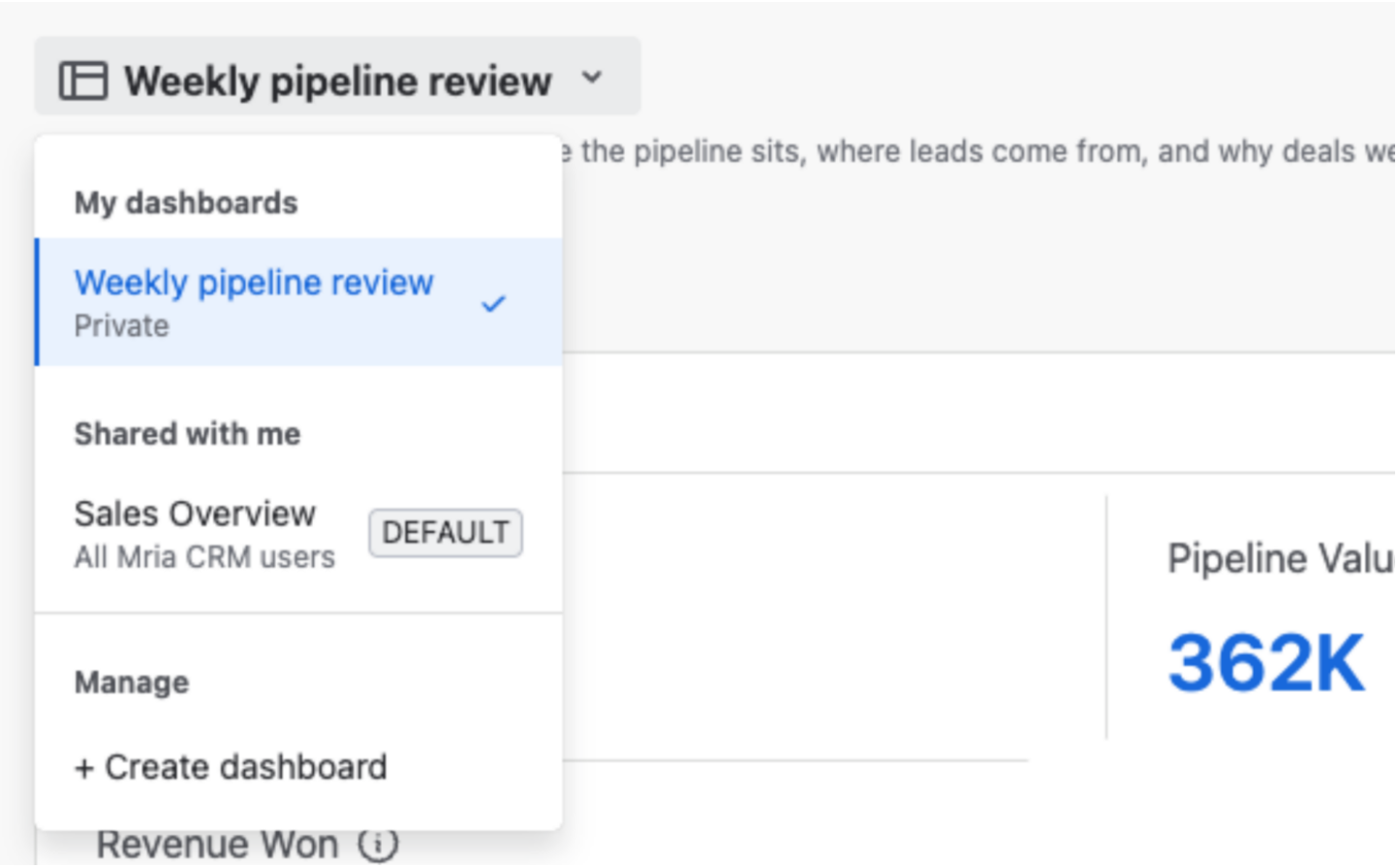
1. Sales Overview — the default dashboard



Sales Overview is marked **DEFAULT**, owned by Mria CRM and visible to every Mria CRM user. It holds two sets of KPI cards, the Pipeline Funnel, the Pipeline Value Funnel and the Revenue Trend.

- Administrators can customize it for the whole site, and **Reset to default** puts back the original layout.
- Everyone else can view it, and **Duplicate** it to get a private copy they can change.
- It cannot be deleted, so there is always a dashboard to land on.

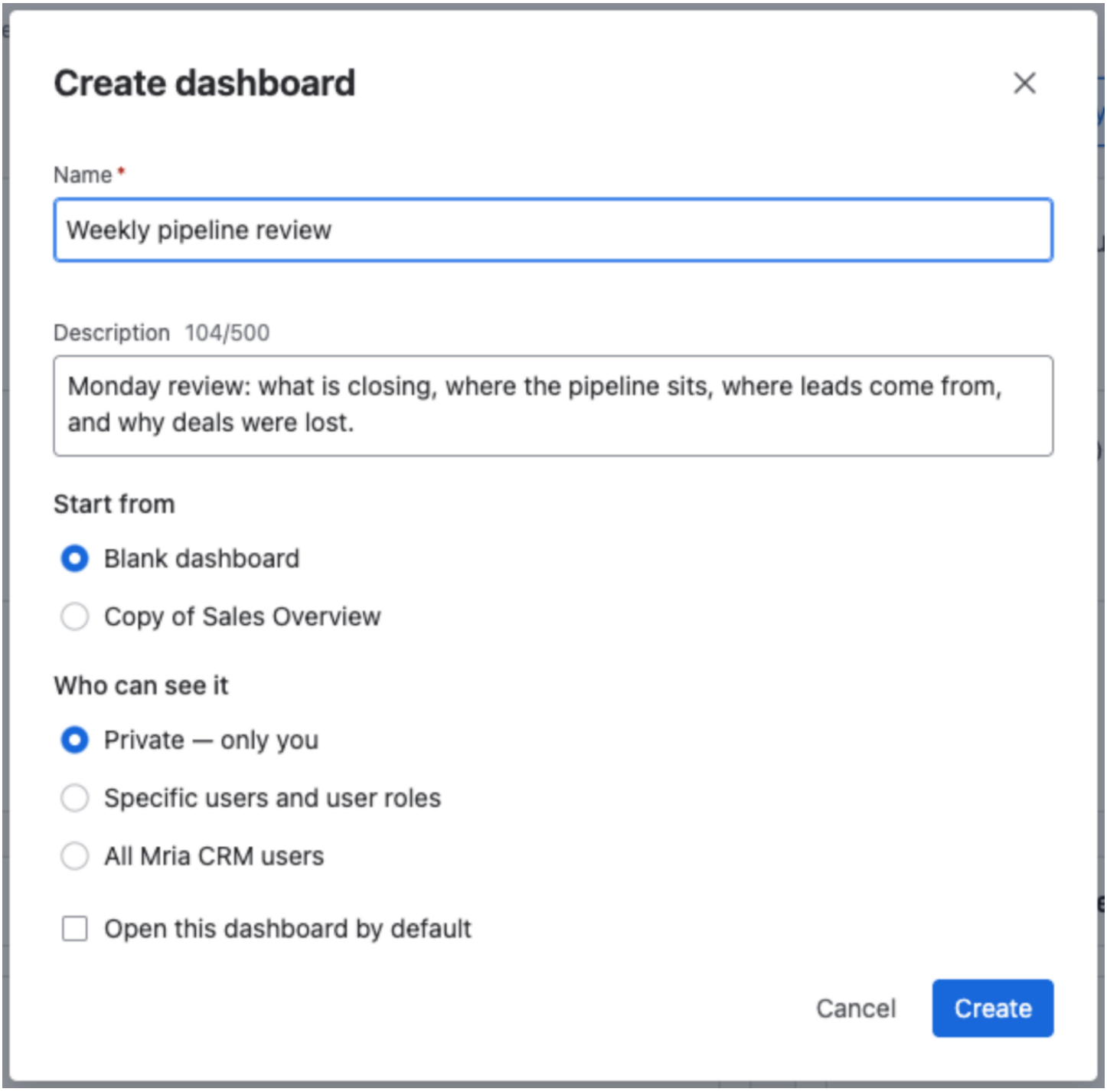
2. Switching dashboards



The dashboard's name at the top of the page is a switcher. It lists **My dashboards** — the ones you own, with who can see each — and **Shared with me**, which always includes Sales Overview. **+ Create dashboard** is at the bottom.

- **Set as my default** in the dashboard's ··· menu makes it the one that opens when you click **Dashboards** in the sidebar.
- Each dashboard has its own link. Paste it into a Jira comment or a Confluence page and it opens that dashboard — for people it is shared with.
- The filters you last used are remembered per dashboard, for you alone. A Monday review opens the way you left it.

3. Creating a dashboard



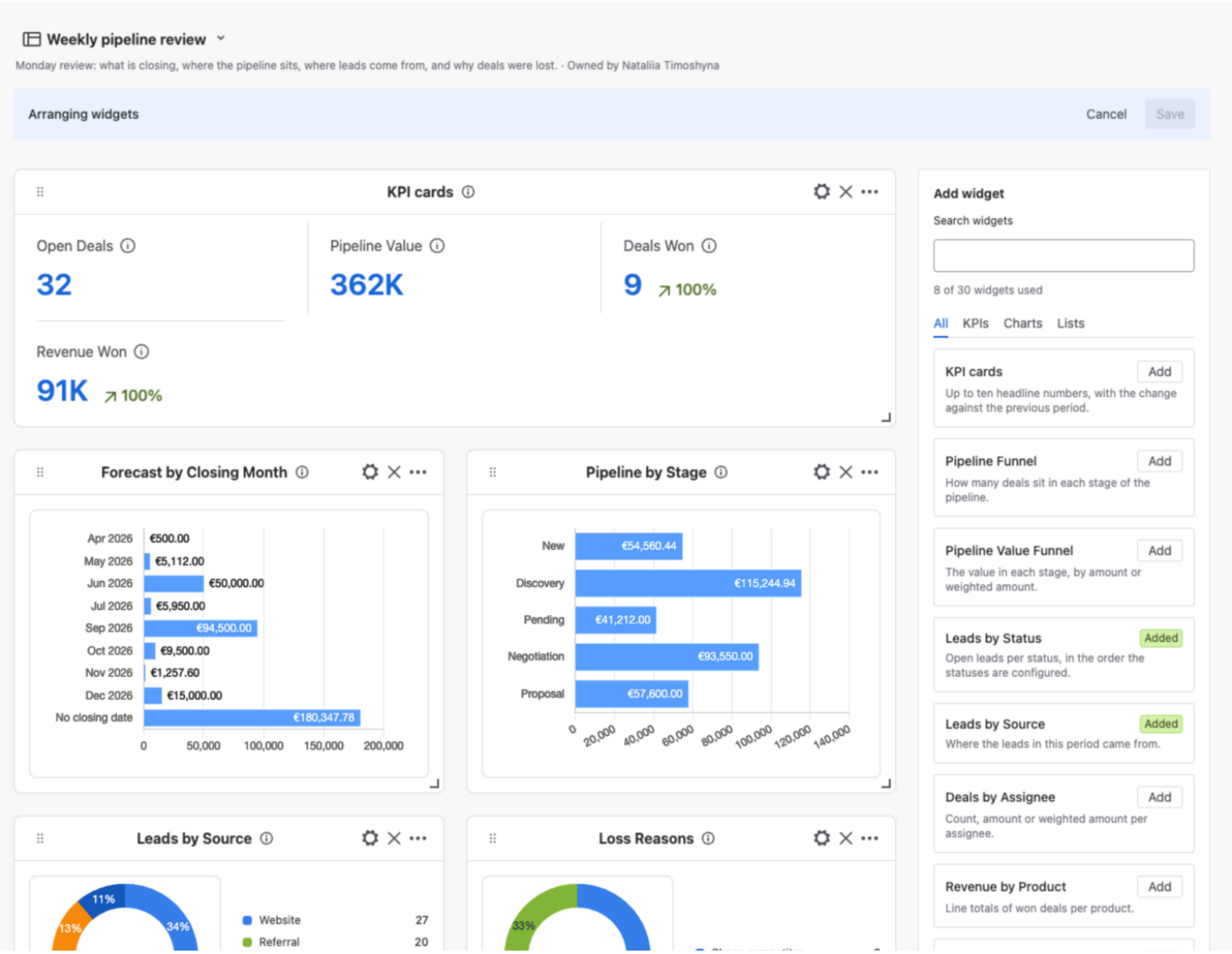
Field	What it does
Name *	Shown in the switcher and at the top of the page.
Description	Up to 500 characters, shown under the name. Say what the dashboard is for.
Start from	A blank dashboard, or a copy of the one you are looking at.

Field	What it does
Who can see it	Private — only you; Specific users and user roles; or All Mria CRM users. You can change it later with Share.
Open this dashboard by default	Makes it your default straight away.

Any Mria CRM user can create dashboards. A dashboard is a view of data, not data itself, so creating or sharing one gives nobody access to records.

4. Adding and arranging widgets

Click **Customize**. The dashboard switches to editing — the bar at the top reads **Arranging widgets** — and the **Add widget** panel opens on the right.



- **Add:** search the panel or browse the All, KPIs, Charts and Lists tabs, then click Add. A widget that can appear only once reads **Added** when it is already on the dashboard. The panel counts what is used — a dashboard holds up to 30 widgets.
- **Move:** drag a widget by the grip at its top left.
- **Resize:** drag the corner at its bottom right.
- **Configure:** the gear opens the widget's settings (section 6).
- **Remove:** the ×.
- **Save** keeps the layout; **Cancel** throws away everything since you clicked Customize.

KPI cards, lists and Custom field breakdown can be added more than once — two sets of KPI cards with different metrics, or Stale records for Leads and again for Deals.

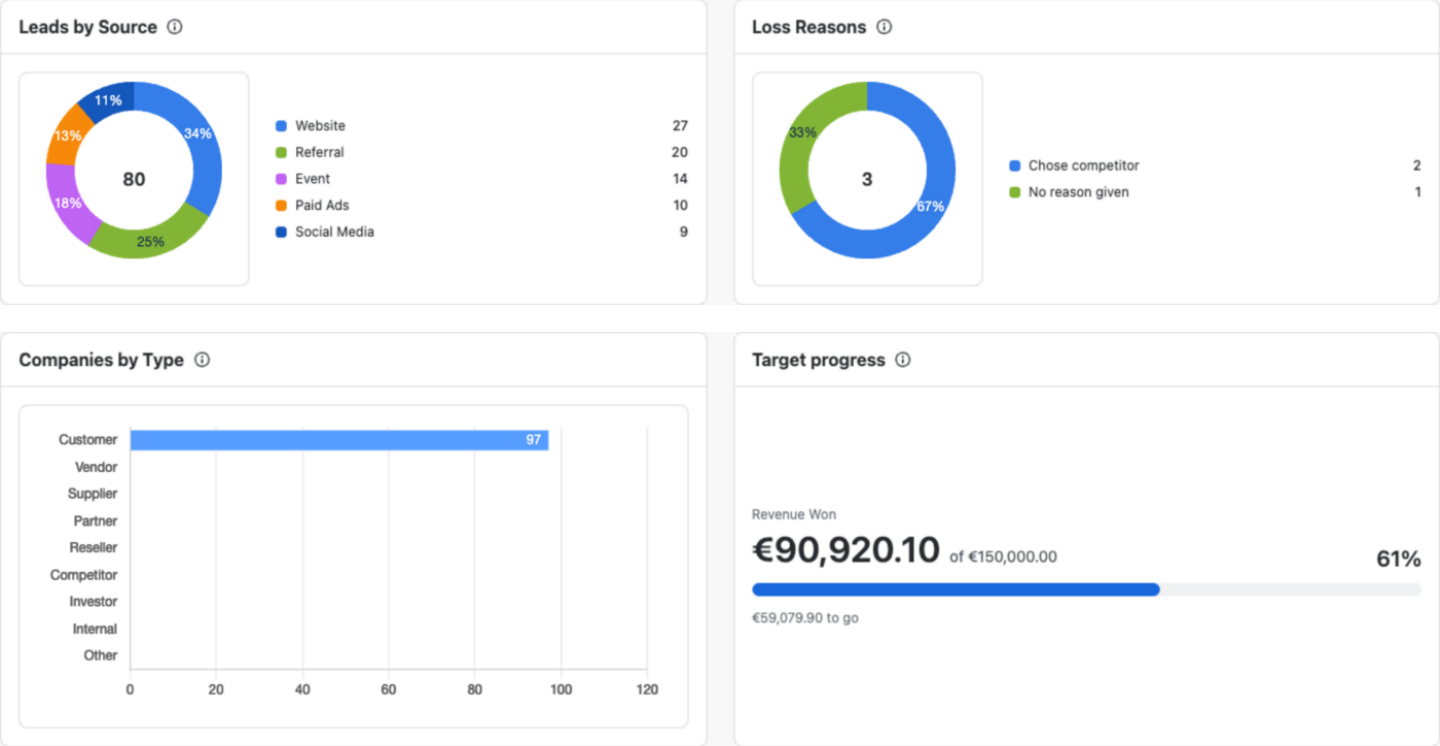
5. The widgets

The catalogue holds 28 widgets. Every widget has an with a one-line description. The third column shows the dashboard filters a widget does not follow — a funnel of open Deals, for example, has no date.

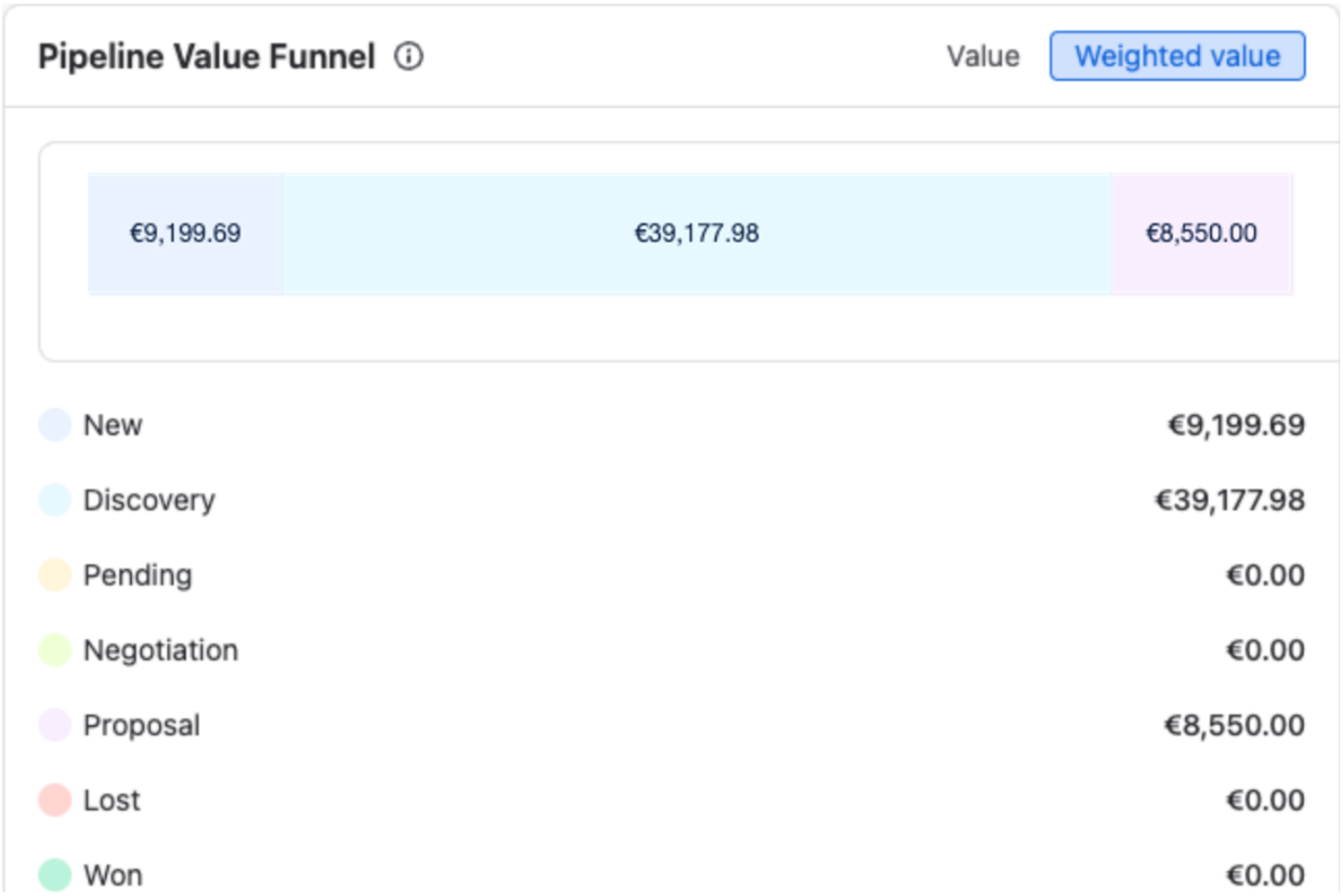
Widget	Shows	Not affected by
KPI cards	Up to twelve headline numbers, with the change against the previous period.	—
Pipeline Funnel	How many deals sit in each stage of the pipeline.	—
Pipeline Value Funnel	The value in each stage, by amount or weighted amount.	—
Revenue Trend	Revenue from won deals over time, daily, weekly or monthly.	—
Forecast by Closing Month	Open deals by expected closing month, by amount or weighted amount, over every month or a window from this one.	date
Pipeline by Stage	Open pipeline per stage, by amount or weighted amount.	date
Won vs Lost	Deals won and lost over time, by closing date.	—
Deals by Assignee	Count, amount or weighted amount per assignee.	—
Deals by Type	How many deals, or how much, of each deal type.	—
Loss Reasons	Lost deals in the period, grouped by reason for loss.	—
Revenue by Product	Line totals of won deals per product.	—
Leads by Status	Open leads per status, in the order the statuses are configured.	date and pipeline
Leads by Source	Where the leads in this period came from.	pipeline

Widget	Shows	Not affected by
Companies by Type	How many companies there are of each type.	date, assignee and pipeline
Companies by Industry	How many companies there are in each industry.	date, assignee and pipeline
Companies by Country	How many companies there are in each country, as it is written on the company.	date, assignee and pipeline
Companies by Size	How many companies there are of each size.	date, assignee and pipeline
Contacts by Job Title	How many contacts hold each job title, as it is written on the contact.	date, assignee and pipeline
Contacts by Company Type	How many contacts work at companies of each type.	date, assignee and pipeline
Contacts by Company Size	How many contacts work at companies of each size.	date, assignee and pipeline
Contacts by two fields	Contacts grouped by one field and split by another — company size by job title, say.	date, assignee and pipeline
Top companies by pipeline	Companies ranked by the value of their open deals.	date and pipeline
Deals closing soon	Open deals ordered by closing date, soonest first.	date
Recently won	Won deals by closing date, most recent first.	—
Stale records	Open Leads or Deals with no activity for a number of days you choose, or never. Lost, Junk, Duplicate, converted and closed records are left out.	date
Target progress	A target you type in, against what has actually been won.	—

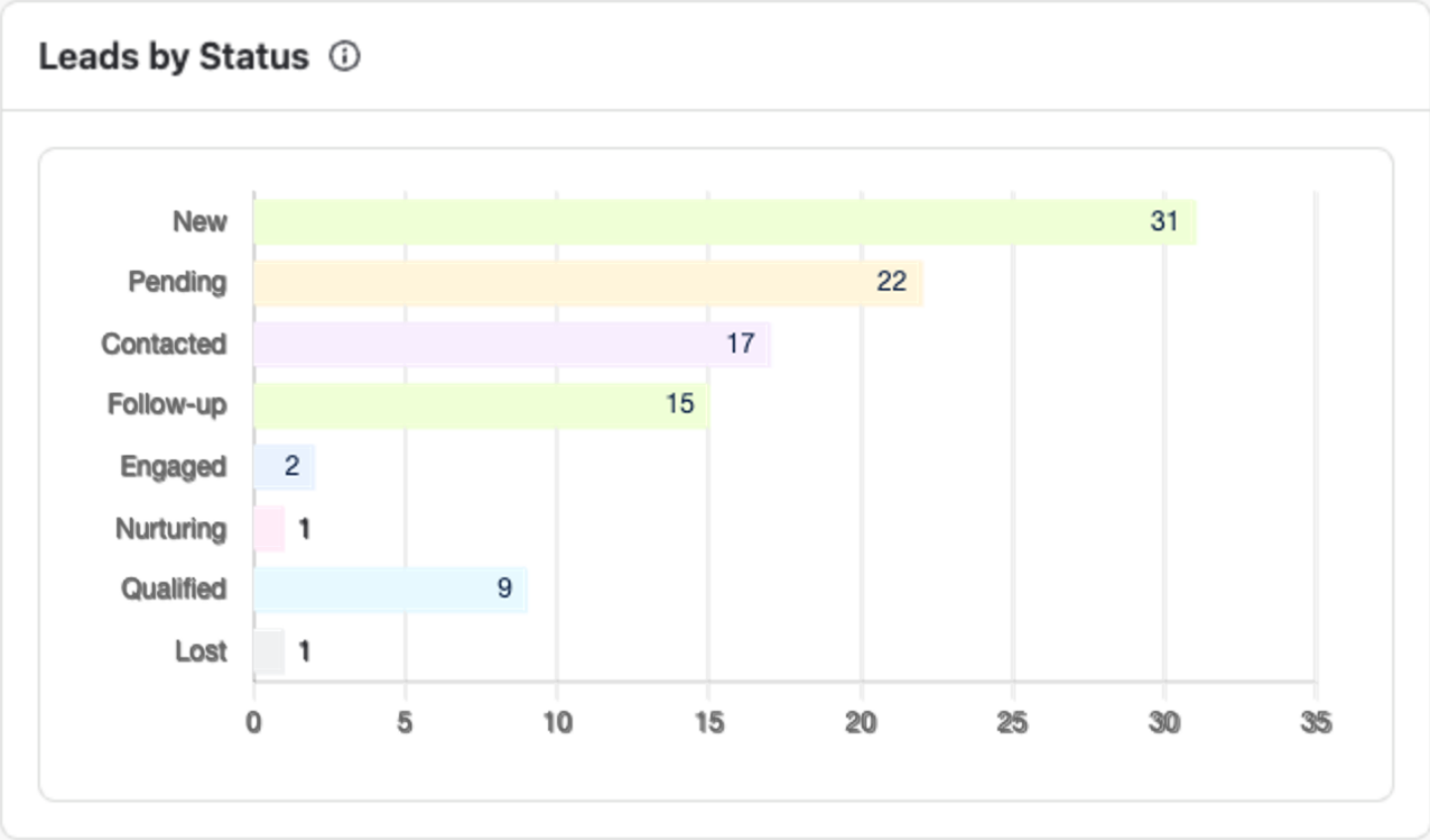
Widget	Shows	Not affected by
Custom field breakdown	Records per option of a Dropdown, Multi-select or Labels custom field of Deals, Leads, Contacts, Companies or Products — by count, or by deal amount for Deals.	date, assignee and pipeline
Report snapshot	The first rows of a saved report, with a link to open it.	date, assignee and pipeline



Charts that measure money — Pipeline Value Funnel, Deals by Assignee, Forecast by Closing Month, Pipeline by Stage — can show the plain amount or the **weighted amount**: amount × the Deal's probability. In the Pipeline Value Funnel, the Value / Weighted value switch sits in the widget's header. Won and Lost read €0.00 in weighted mode, because weighting applies to open Deals only.

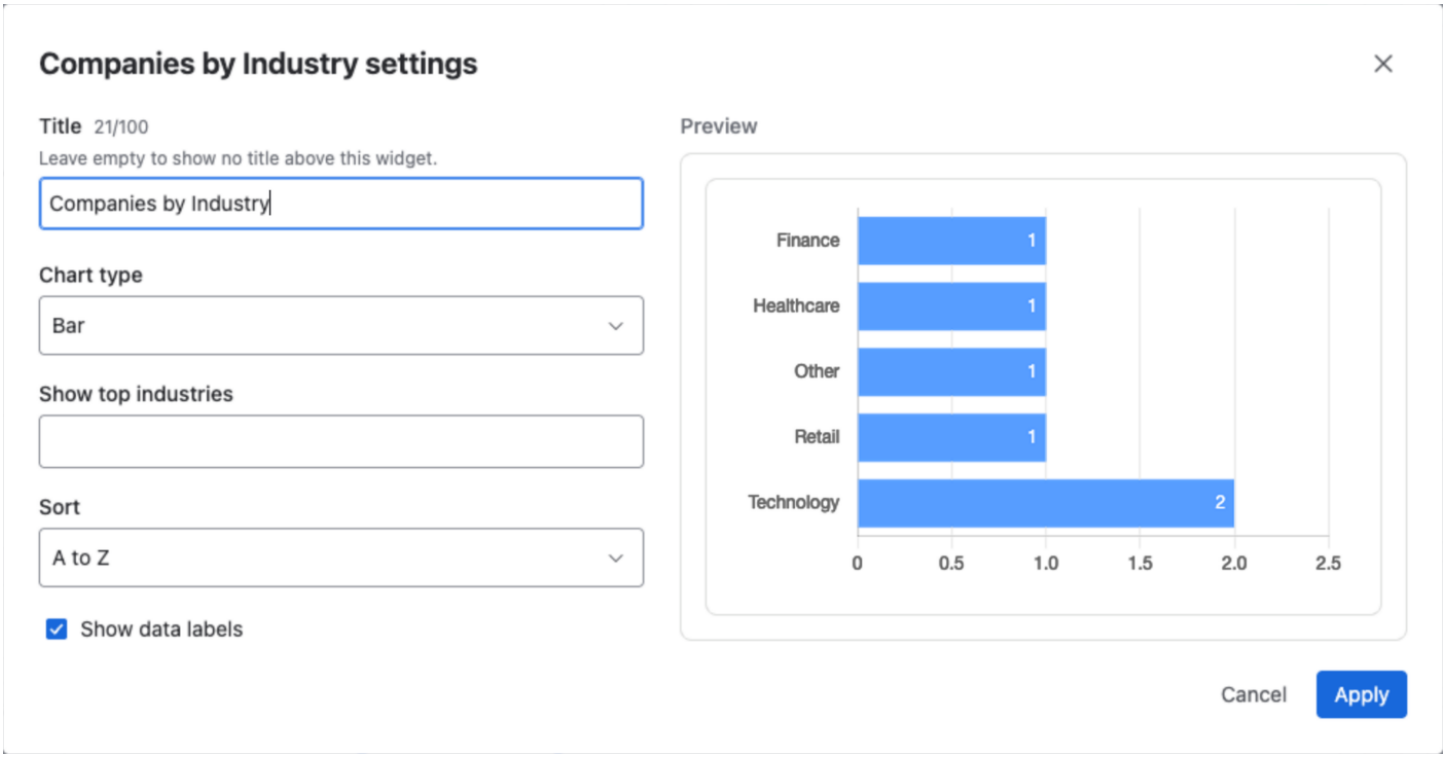


Leads by Status lists open Leads per status, in the order the statuses are configured:

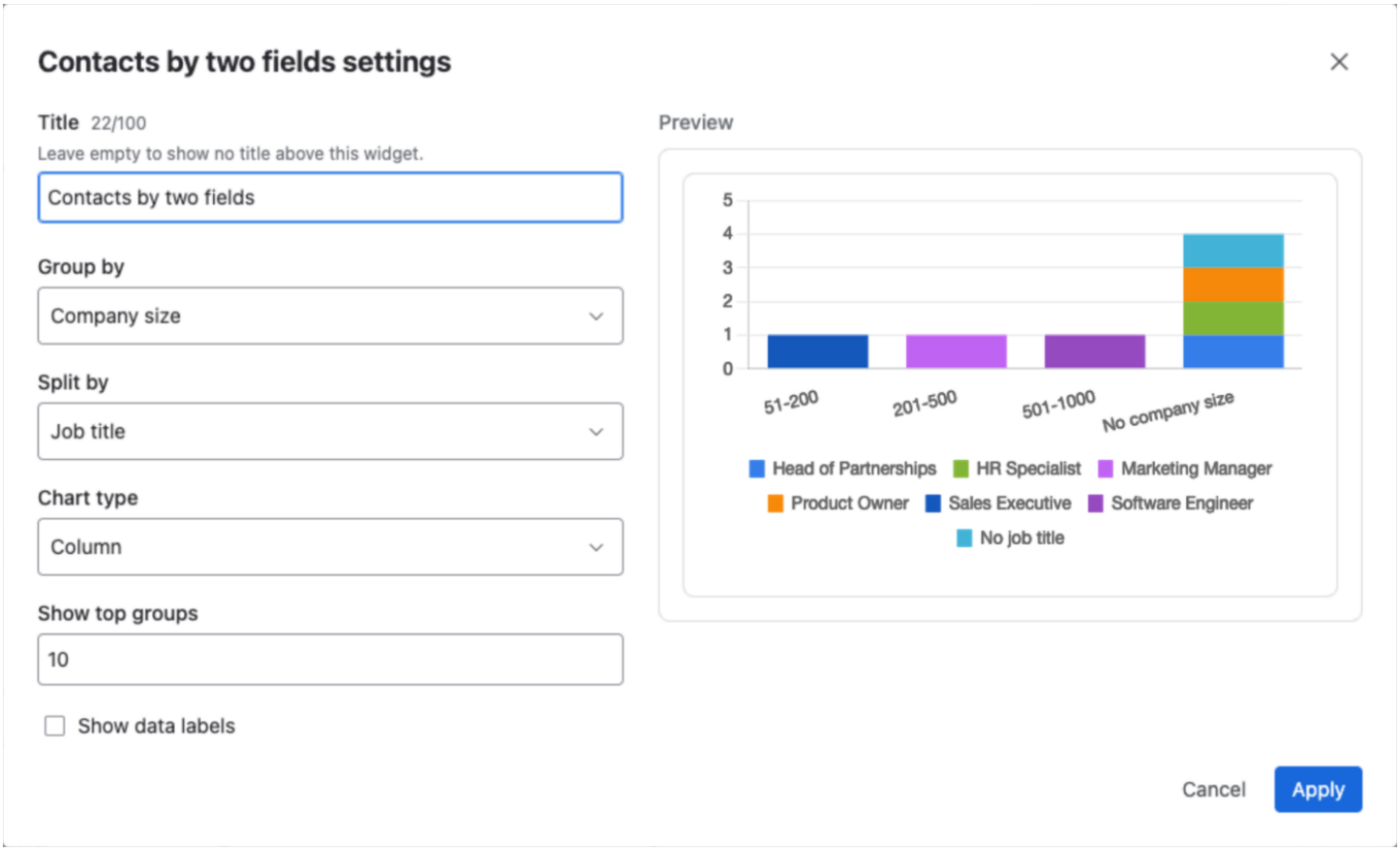


Companies and Contacts

Seven widgets count Companies and Contacts rather than Deals: Companies by Industry, Country and Size beside Companies by Type, and Contacts by Job Title, Company Type and Company Size. They count every record and follow none of the dashboard filters.



Contacts by two fields is a cross-tab: pick a **Group by** and a **Split by** field from Job title, Company type, Company size, Company industry and Company country, and show it as stacked columns, stacked bars or a table. Contacts with no value — no job title, or no company — get their own bucket, such as *No company size*.

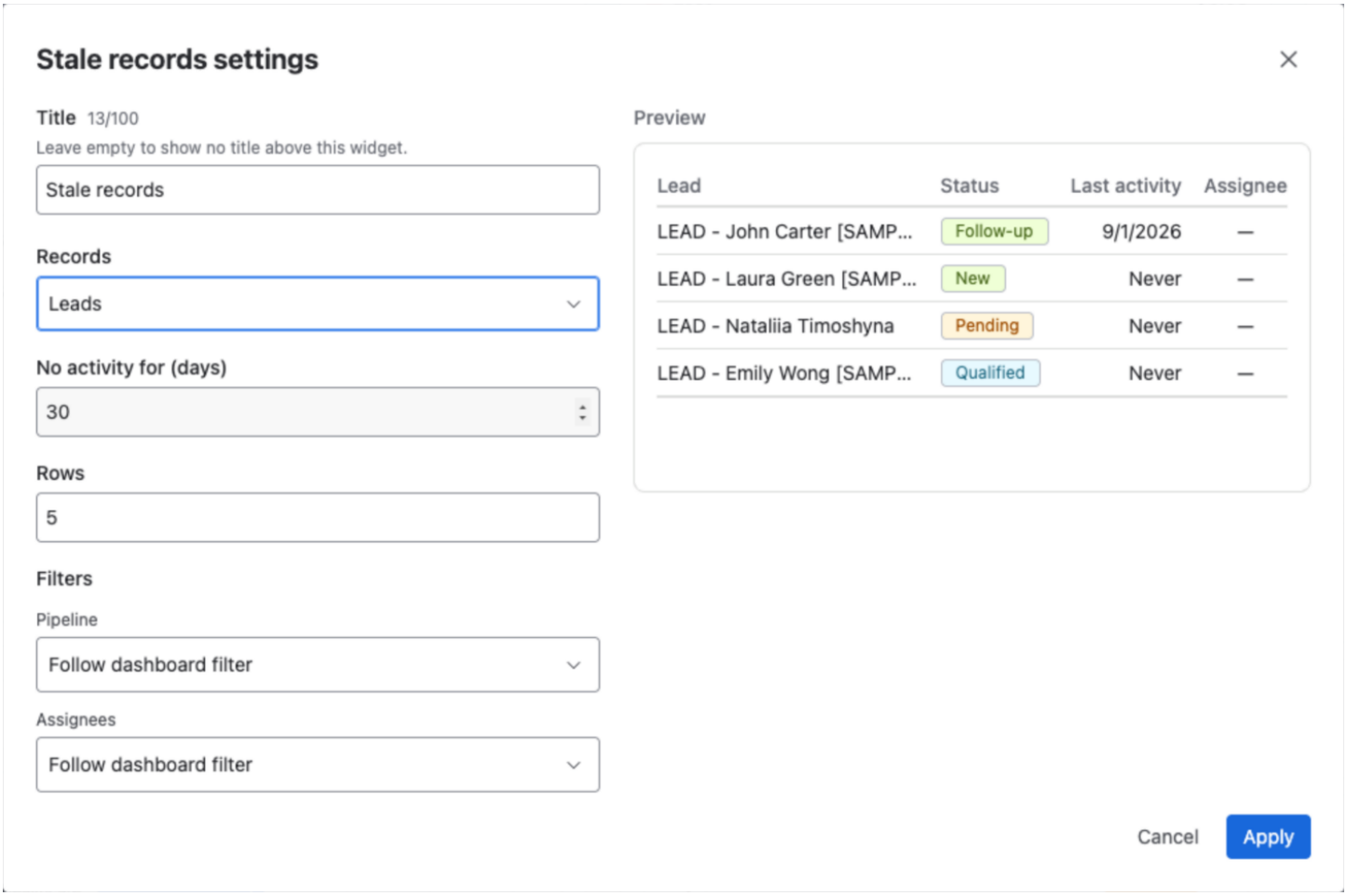


Permissions

A Contacts widget that reads the contact's company — Company Type, Company Size, or a two-field split on a company field — needs View on both Contacts and Companies in the viewer's role. Custom field breakdown needs View on the records it counts.

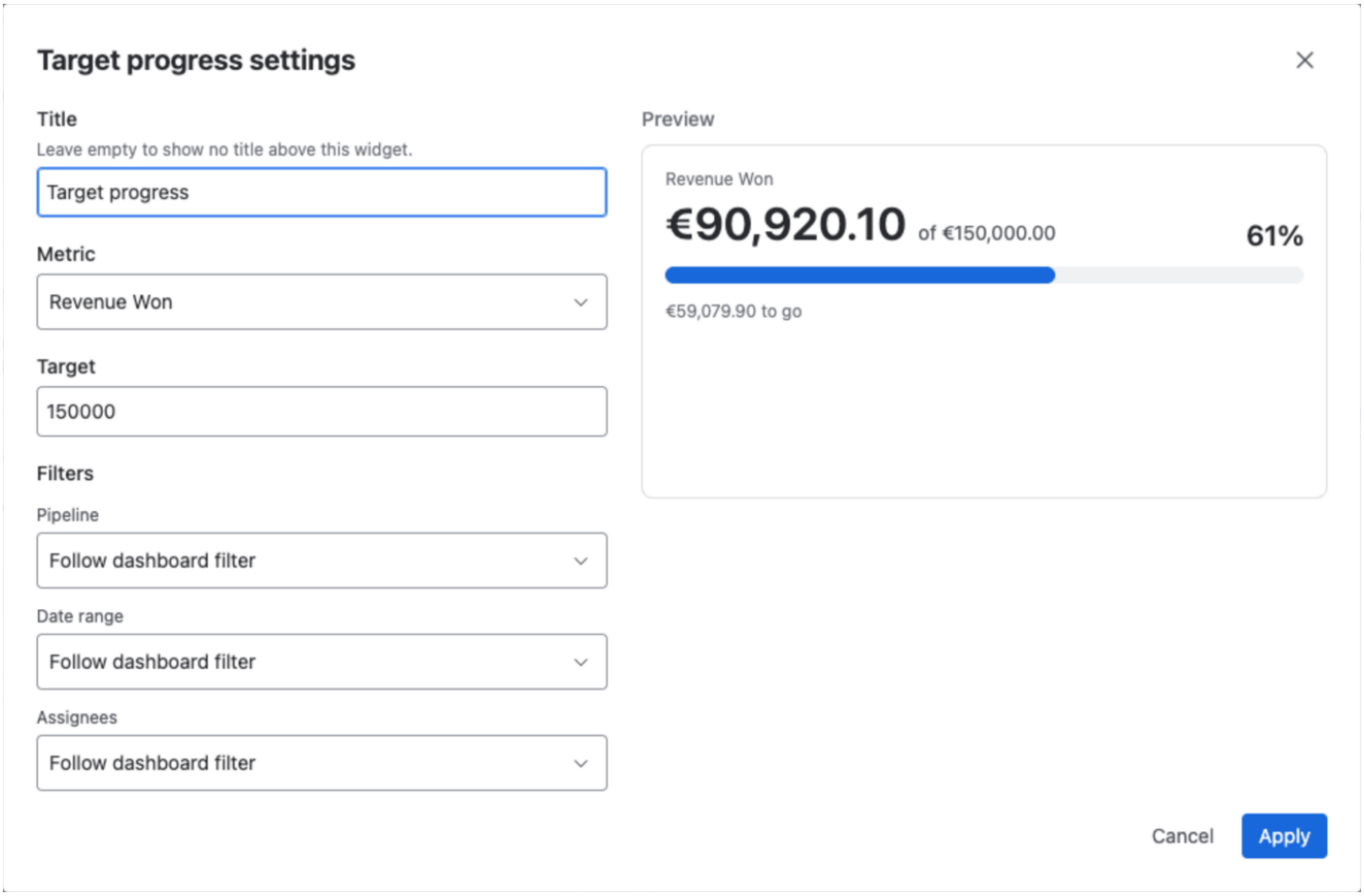
Colors and pictures

Charts and lists use the colors you set in Settings: Pipeline by Stage draws each stage in its pipeline color, Companies by Type in the type's color, and Deals closing soon, Recently won and Stale records show stages and lead statuses as the same colored chips as the Leads and Deals lists. Assignees appear as their Jira picture, or their initials when they have none.

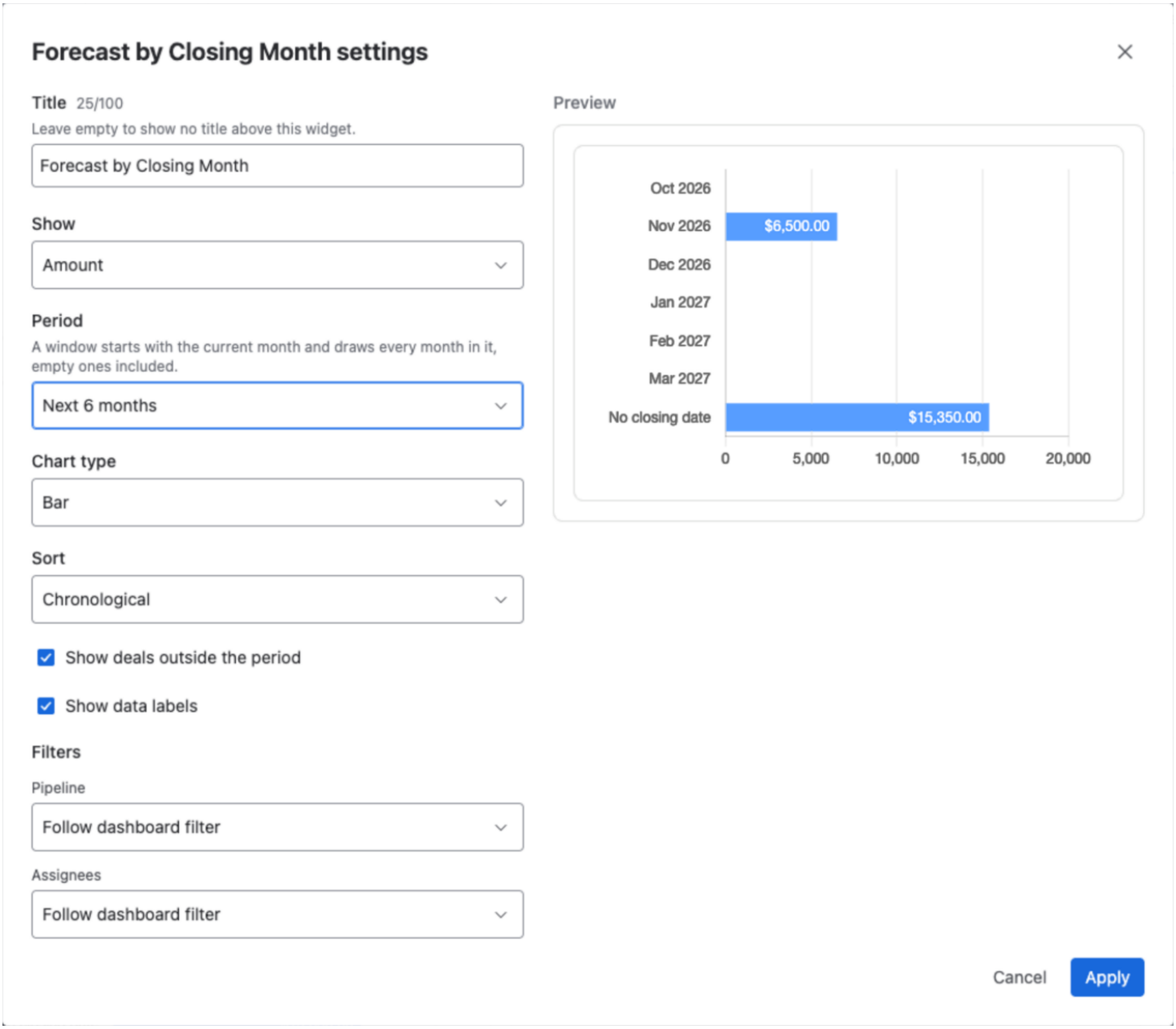


6. Widget settings

The gear on a widget, in Customize, opens its settings with a live preview. What you can set depends on the widget:



- **Title** — leave it empty to show no title above the widget.
- **What to show** — the metrics of KPI cards, count, amount or weighted amount on the money charts, the chart type, how many to show, the sort order and data labels.
- **Rows** on lists, and **No activity for (days)** on Stale records.
- **Period** on Forecast by Closing Month — **All open deals**, or a window that starts with the current month: **Next 3 months**, **Next 6 months**, **Next 12 months** or **This year**. Every month in the window is drawn, empty ones included. With **Show deals outside the period** ticked, the deals that fall outside get a bar each — **Overdue**, **Later** and **No closing date**; untick it to see the window alone.
- **Filters** — Pipeline, Date range and Assignees, each **Follow dashboard filter** or set for this widget alone: a pipeline or All pipelines; a period from Last 7 days to Year to date, or Custom dates; Only these people. A Target progress widget set to the quarter's Custom dates keeps showing the quarter whatever period the rest of the dashboard is set to.



Dates and amounts follow the workspace formats in General Settings. With a Date format set, month labels on Forecast by Closing Month and on the monthly Revenue Trend and Won vs Lost read **10/2026**, **2026-10** or **Oct 2026**, and dates in list widgets use the same format; with a Number format set, the value axis of bar charts uses it too. Left at **Not set**, each widget keeps its own style.

Three widgets ask for one setting before they can draw anything: **Custom field breakdown** (which records — Deals, Leads, Contacts, Companies or Products — and which of their Dropdown, Multi-select or Labels fields), **Report snapshot** (which report) and **Target progress** (the target amount).

7. KPI definitions

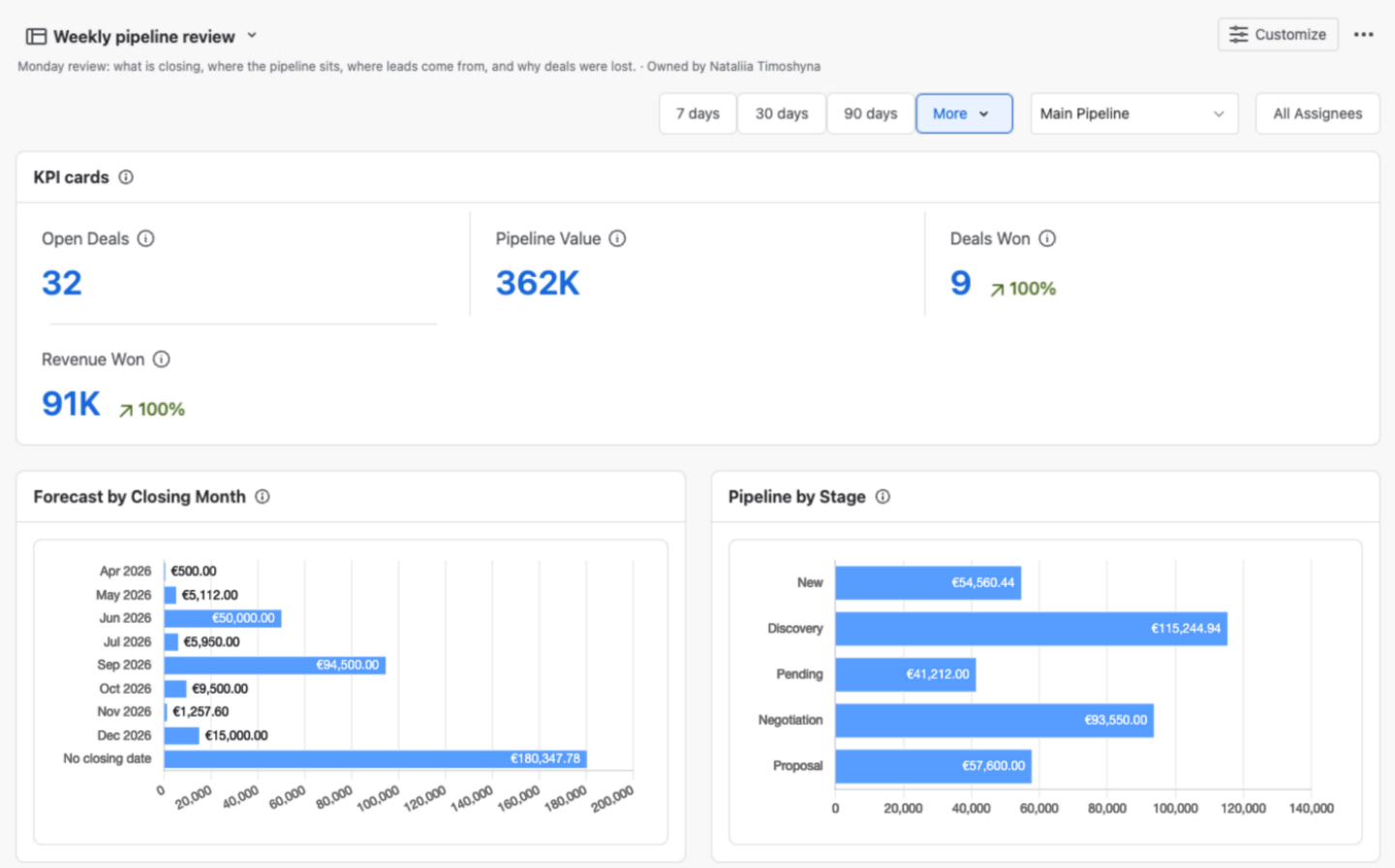
A KPI cards widget shows up to twelve of these. A new one starts with Open Deals, Pipeline Value, Deals Won and Revenue Won; its settings choose the metrics, how many sit in a row and whether to compare with the previous period. Hover over on any card for the same definition.

- **Open Deals —** Number of currently active (not Won or Lost) Deals. Not affected by the date filter.
- **Pipeline Value —** Total value of all open (not Won or Lost) Deals across all stages. Not affected by the date filter.
- **Weighted Pipeline Value —** Sum of Deal amount × probability for open Deals. Probability comes from the pipeline stage unless it is overridden on the Deal. Not affected by the date filter.
- **Deals Won —** Number of Deals marked as Won in the selected period.
- **Deals Lost —** Number of Deals marked as Lost in the selected period.
- **Revenue Won —** Total revenue generated from Deals marked as Won in the selected period.
- **Average Deal Value —** Average value of Deals marked as Won in the selected period.
- **Sales Cycle Length —** Average Sales Cycle Length in days, calculated as the difference between the Deal Creation Date and Close Date, for Deals closed in the selected period.
- **Win Rate —** Percentage of Won Deals out of all closed Deals (Won + Lost) in the selected period.
- **New Leads —** Number of new Leads created in the selected period. Not affected by the pipeline filter.
- **Open Leads** — Number of Leads that are neither converted nor archived. Not affected by the date or pipeline filter.
- **Unassigned Leads** — Number of open Leads with no assignee. Not affected by the date, assignee or pipeline filter.
- **Conversion Rate —** Percentage of Leads created in the selected period that were converted into Deals. Not affected by the pipeline filter.
- **Total Contacts** — Number of Contacts in Mria CRM. Not affected by the date, assignee or pipeline filter.
- **New Contacts** — Number of Contacts created in the selected period. Not affected by the assignee or pipeline filter.
- **Total Companies** — Number of Companies in Mria CRM. Not affected by the date, assignee or pipeline filter.

- **New Companies** — Number of Companies created in the selected period. Not affected by the assignee or pipeline filter.

Open Deals, Pipeline Value and Weighted Pipeline Value describe the pipeline as it is now, so they do not change with the date filter. Weighted Pipeline Value uses each Deal's own probability when it has been overridden on the Deal, otherwise the stage's.

8. Filters

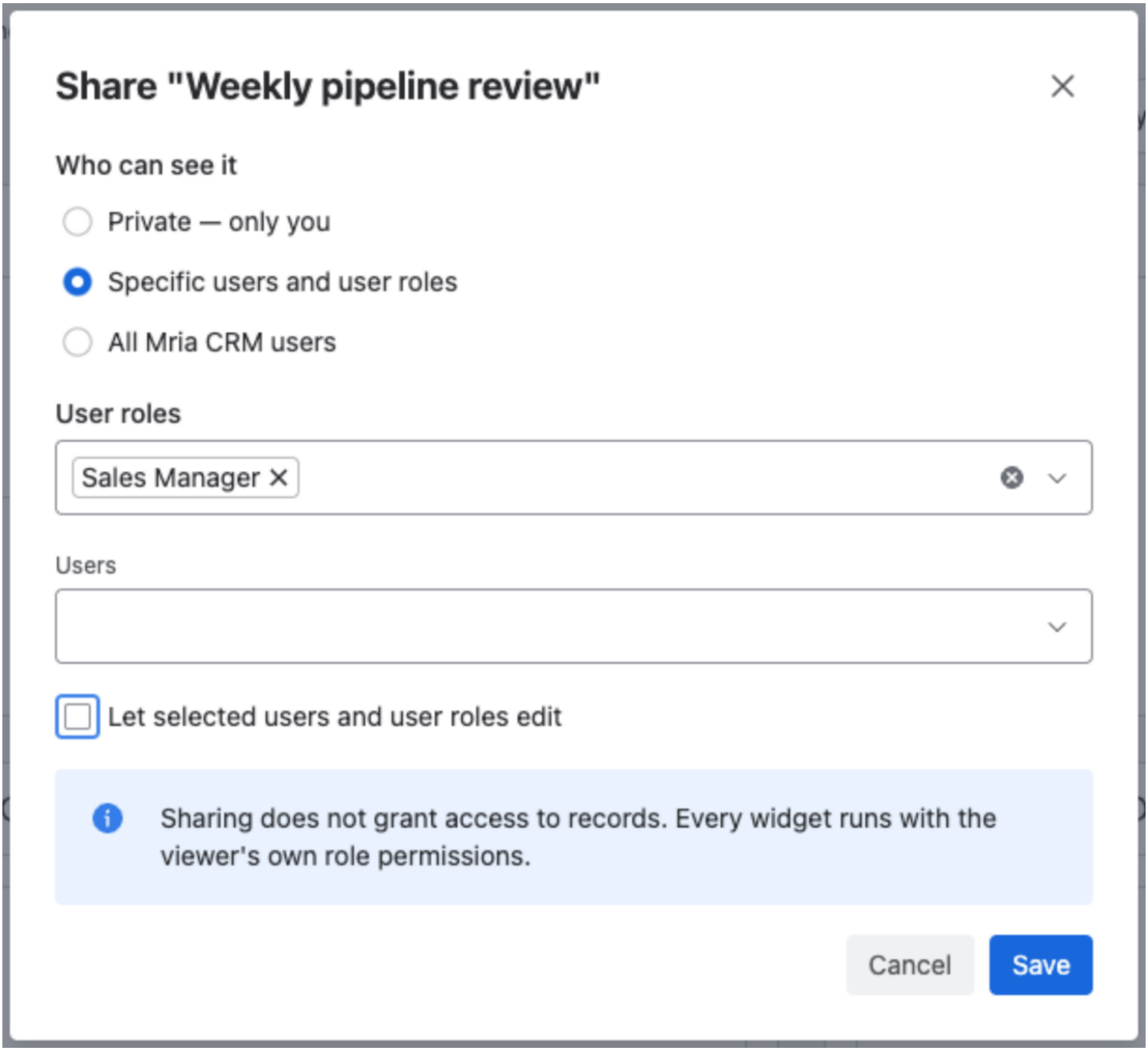


- **Date range:** 7 days, 30 days or 90 days, or under **More**: 6 months, 12 months, Year-To-Date (YTD), or a Custom range. Pick one under More, then Apply.
- **Pipeline:** any pipeline, or **All Pipelines**, which adds up stages with identical names (such as Won and Lost) across pipelines — see Pipelines Configuration.
- **Assignees:** one or several people. With none selected, everyone's data is shown.

The filters apply to every widget set to follow them. Changes take effect at once, and are remembered for you on that dashboard.

Click a stage in either funnel to open the Deals list filtered to that pipeline and stage. The Revenue Trend switches between Daily, Weekly and Monthly.

9. Sharing



Share in the dashboard's ⋯ menu sets who can see it:

- **Private — only you.**
- **Specific users and user roles** — pick people, roles from Roles & Permissions (built-in or custom), or both.
- **All Mria CRM users.**

Tick **Let selected users and user roles edit** to let them change the layout too. Otherwise they can view it, and duplicate it to make their own.

> **Sharing does not grant access to records**
> Every widget runs with the viewer's own role permissions. Two people looking at the same shared dashboard can see different numbers, because each sees only the records their role allows.

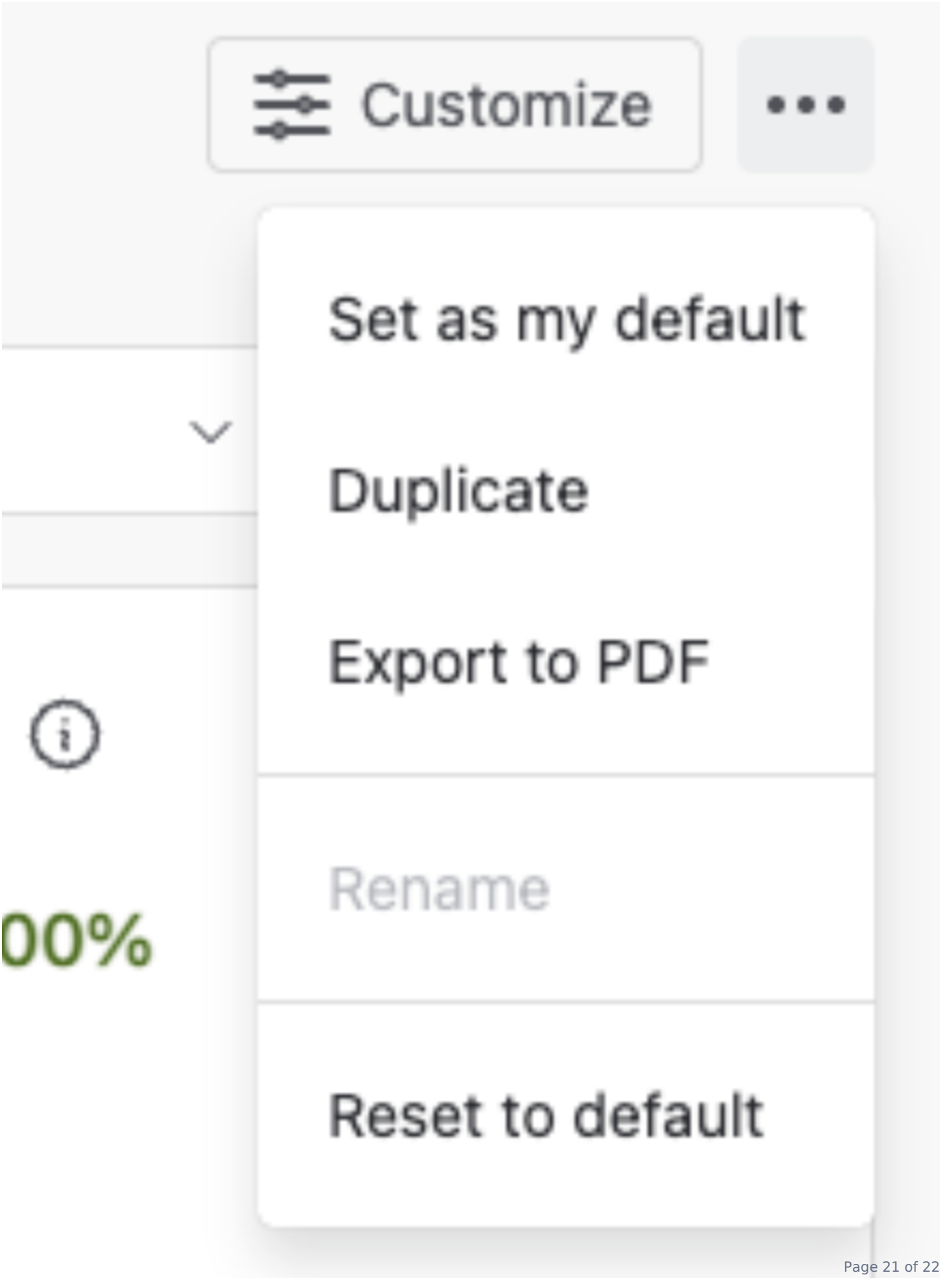
10. Who can do what

	Owner	Shared with, view only	Administrator
View, filter, set as my default	✓	✓	✓
Duplicate	✓	✓	✓
Customize	✓	Only with **Let … edit**	✓
Rename, Share, Delete	✓	—	✓
Edit or reset Sales Overview	—	—	✓

The ⋯ menu of your own dashboard offers Set as my default, Duplicate, Export to PDF, Rename, Share and Delete. On Sales Overview, Administrators get Set as my default, Duplicate, Export to PDF and Reset to default.

Export to PDF

Export to PDF in the dashboard's ⋯ menu saves the dashboard as you see it — with the filters it is set to — as a PDF file named after the dashboard and the date, for example *Sales_Overview_2026-10-21.pdf*.


Customize
Set as my default
Duplicate
Export to PDF
Rename
Reset to default
00%

- Pages are A4 landscape, with the dashboard's name and date range on top and a page footer. Widgets keep the dashboard's order and share pages — several to a page, with the KPI cards kept together in one strip — and a widget is never cut across two pages.
- Charts, KPI cards and lists come out as pictures of the widgets: the PDF has no selectable or searchable text.
- Assignees appear as their initials, not their Jira picture — the browser is not allowed to copy pictures from Atlassian's avatar service into a file.
- The PDF is made in your browser from the dashboard on screen, so it holds exactly what your role lets you see.

Related Pages

- Deals — weighted amounts and the Deals list the funnels open.
- Reports — the saved reports a Report snapshot shows.
- Pipelines Configuration — stages, probabilities and All Pipelines.
- Roles & Permissions — what each viewer's widgets are allowed to count.