

My Pipeline - Current Year



- Stages
- Qualification
  - Example Stage
  - Proposal/Pitch Guide
  - Negotiation/Review
  - Close/Won
  - Close/Lost
  - Meeting Scheduled

[View Report](#)

No. of Today at 10:27

Potential Revenue Source - Current Year



- Lead Source
- Advertisement
  - External Referral
  - Search
  - Trade Show
  - Ref.

[View Report](#)

No. of Today at 10:27

Recent Records

- HomePage - Potential Revenue Source
- HomePage - All Pipeline - Current Year
- Placeholder text (Change to medium priority, reply, and close case)
- CRMView
- Backpackers, Inc. (Sample)

[View All](#)

Today's Tasks



Nothing due today. Be a go-getter, and check back soon.

[View All](#)

Today's Events



Looks like you're free and about the end of the day.

[View Calendar](#)

Key Deals - Recent Opportunities

- (\$100k)
- GlobalView - 07/04/2017 - \$14,000.00
- Backpackers, Inc. (Sample)
- Backpackers, Inc. (Sample) - 06/03/2017 - \$45,000.00
- Big-Ac Inc. (Sample)
- Big-Ac Inc. (Sample) - 07/04/2017 - \$10,700.00
- Bark Country Outpost (Sample)
- Bark Country Outpost (Sample) - 06/03/2017 - \$20,000.00
- Adventure Trail Company (Sample)
- Adventure Trail Company (Sample) - 06/03/2017 - \$30,700.00

[View All Key Deals](#)

## Create Report

### Category

#### Recently Used

40

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

### Select a Report Type

1. Search Report Types

#### Recently Used Report Types

##### Report Type Name

Opportunities

Leads with potential lead information

Cases

##### Category

Standard

Standard

Standard

+

+

+

10