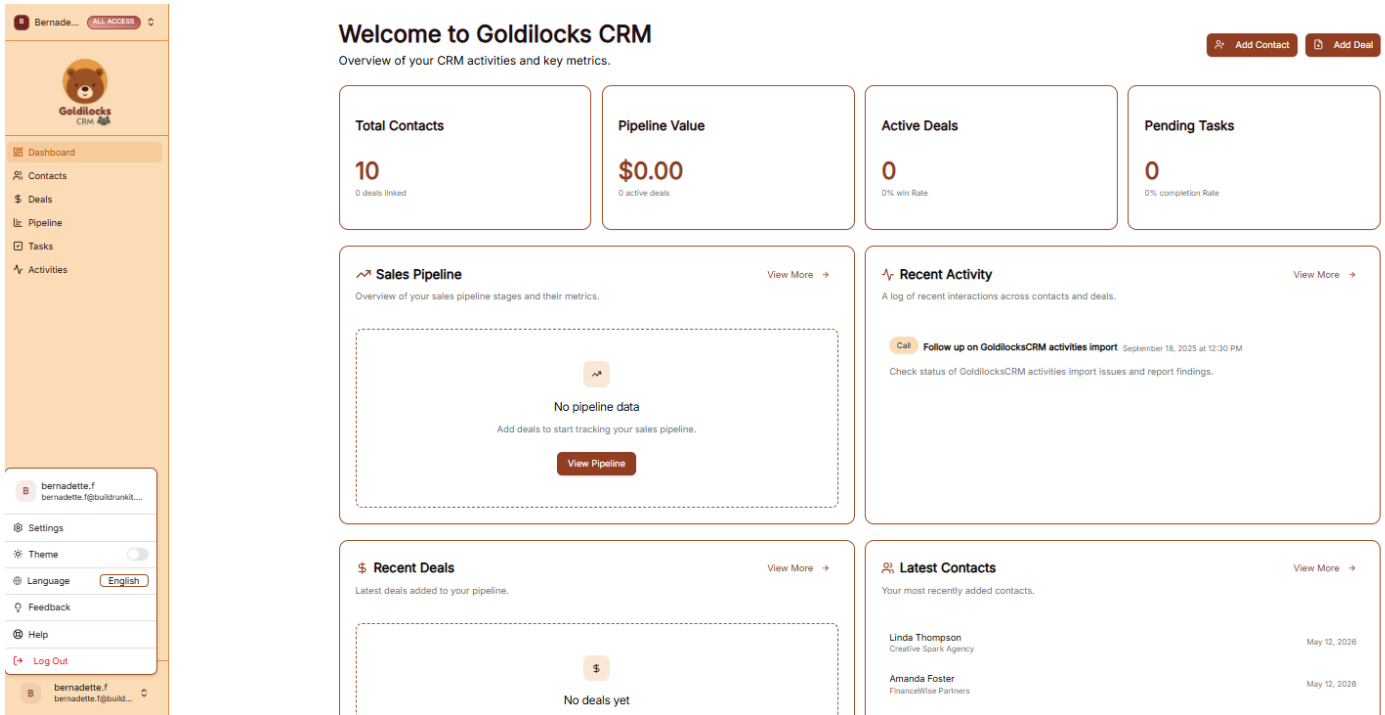


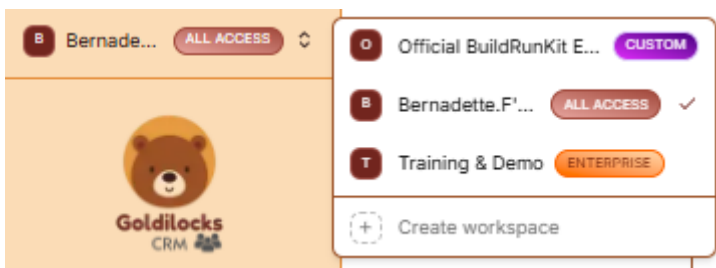
Goldilocks CRM Dashboard

Goldilocks CRM Dashboard



Once you have successfully signed in, you will be greeted by the Dashboard. This page is designed to give you an "at a glance" view of your latest sales activity, offer advanced filtering for your records, and provide fast jumps into your most important CRM workflows.

Managing Your Workspace



At the very top of the left sidebar, you will see your current workspace name. The platform allows you to manage multiple business environments from a single account.

How to Switch Workspaces:

- Click the Workspace Selector: Click on the workspace name at the top of the sidebar.
 - Select from the List: A dropdown menu will appear showing all workspaces you have access to, such as "Official BuildRunKit Employee Workspace" or "Training & Demo".
 - Instant Switch: Click on the desired name to instantly switch all data (Contacts, Deals, and Tasks) to that workspace.
 - Create New: Click + Create workspace at the bottom of this menu to start a brand new business environment.
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Activity Overview Cards

The top cards provide a quick count of your latest synced data and performance metrics:

- Total Contacts: Total count of people and clients in your database.
 - Pipeline Value: The total financial value of all your active deals.
 - Active Deals: The number of current sales opportunities and your win rate.
 - Pending Tasks: The count of upcoming work items and your completion rate.
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Advanced Filtering

To help teams navigate large volumes of data quickly, specialized sorting filters have been integrated directly into the primary core views:

- "Owner" Filter: Available on both the Customers and Deals views, this feature allows you to instantly filter large data sheets to isolate and display only the registries explicitly assigned to a specific team member.
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Quick Action Sections

- Sales Pipeline: View your progress through various sales stages. Click View Pipeline to manage your active deals.
 - Recent Activity: A live log of your latest interactions, including calls and system updates with specific timestamps.
 - Recent Deals: View newly created opportunities. If empty, click Add Deal at the top right to start.
 - Latest Contacts: See a list of newly added contacts, their company names, and their creation dates.
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Dashboard Entity Deletion

You can manage and prune a contact's related records cleanly from their main overview board without opening separate global lists:

- **Direct Removal:** Delete associated Deals, Tasks, and Activities right from the individual contact dashboard view.
 - **Streamlined Workflow:** This update eliminates the hassle of navigating through massive registry lists to remove obsolete or outdated relations.
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Navigation Sidebar

The sidebar provides quick links to the core CRM modules:

- **Dashboard:** Returns you to this overview page.
 - **Contacts:** Access your full client and lead directory.
 - **Deals:** Manage your sales opportunities and revenue.
 - **Pipeline:** View and customize your sales workflow stages.
 - **Tasks:** View and manage your assigned action items.
 - **Activities:** Review the full history of interactions across your workspace.
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