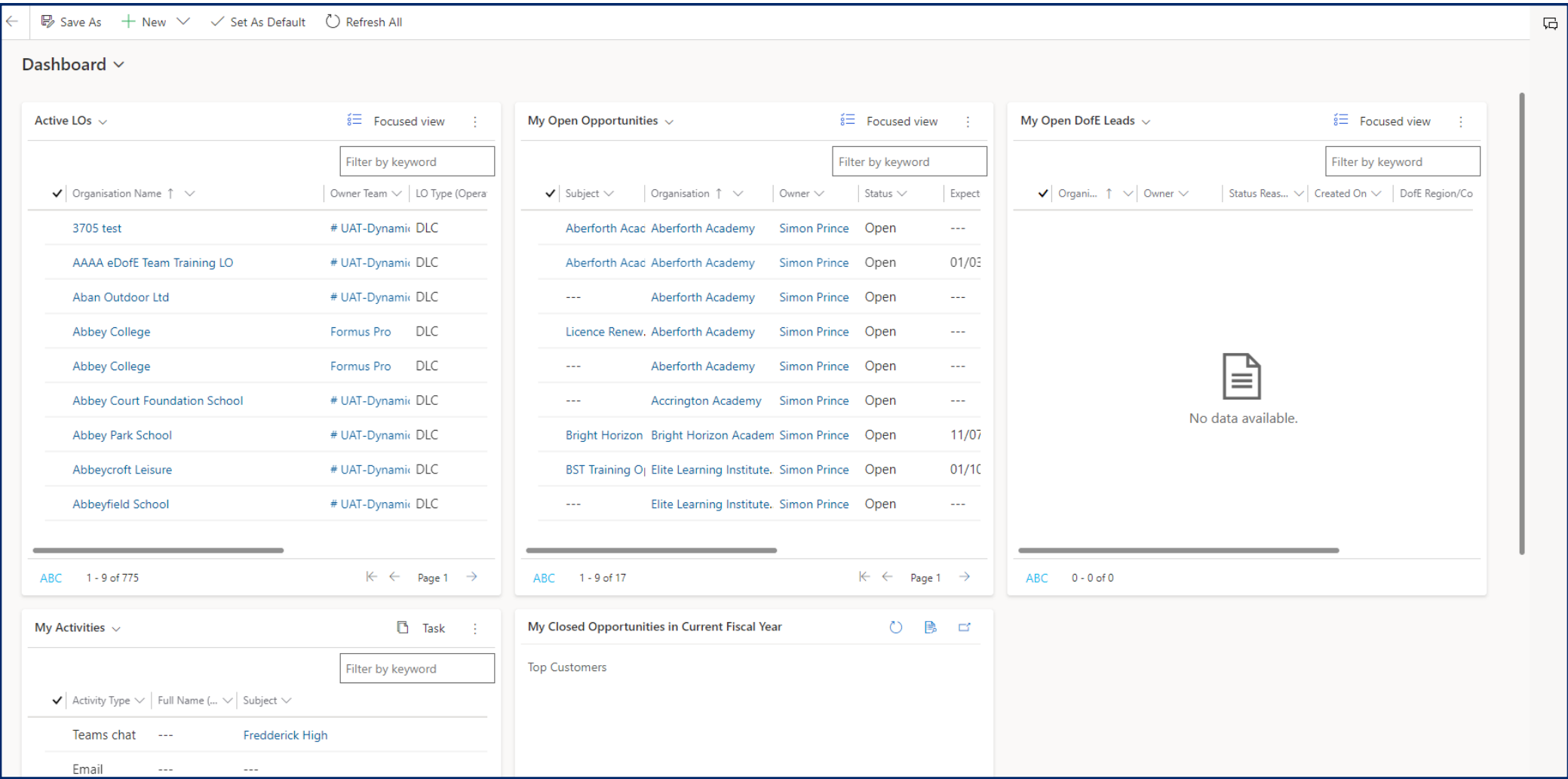


In this document, we will take a look at the parts of the Dashboard screen and what they do.

It will only take a look at the elements that appear when navigating to activities using the sidebar menu.



It is recommended that the options on the top menu should not be used.

Dashboard

Each dashboard will look different. In this section, we will look at the default dashboard that is presented when you click on the option on the sidebar.

Dashboard

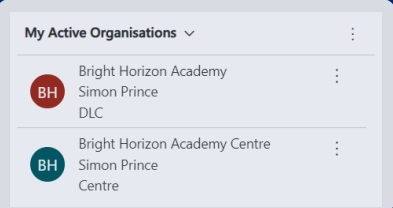
Dashboard

This is the view selector. This will allows you to switch between different dashboards.

My Active Organisations

The first panel gives you an oversight of all your organisations, just like you would see if you chose Organisations from the sidebar.

Clicking on the title allows you to switch between views.



My Open Opportunities

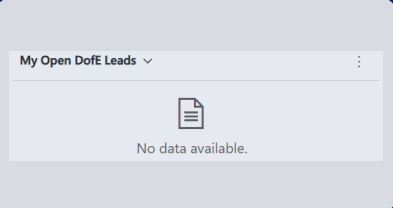
The second panel gives you an oversight of all your opportunities, just like you would see if you chose opportunities from the sidebar.

Clicking on the title allows you to switch between views.

My Open DofE Leads

The third panel, on the top row, gives you an oversight of all your leads, just like you would see if you chose Leads from the sidebar.

Clicking on the title allows you to switch between views.



My Activities

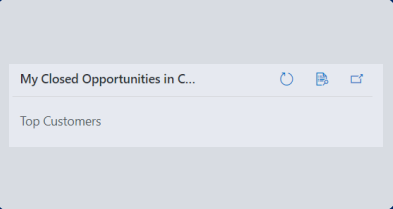
The first panel, on the next row down, gives you an oversight of all your upcoming activities, just like you would see if you chose Activities from the sidebar.

Clicking on the title allows you to switch between views.

My Closed Opportunities in Current Fiscal Year

The last panel gives you an oversight of all opportunities that have been closed.

We can find this as a view in Opportunities.



Task: Play

Take some time to press all the above options to become familiar with the system.

As long as you are in the testing site (Orange banner at the top) you cannot break anything.

For further Dynamics guides, make sure to check out the Digital Systems page on the hub.

This page can also be used to access an array of other learning material.

For further help, reach out to systemstraining@dofe.org