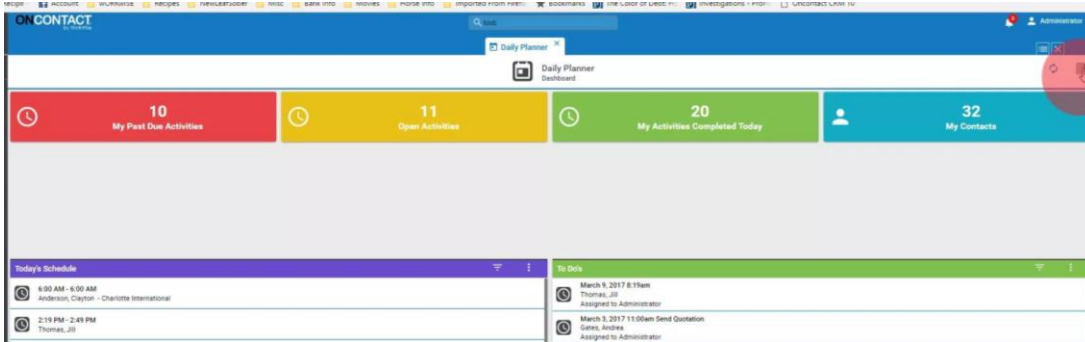
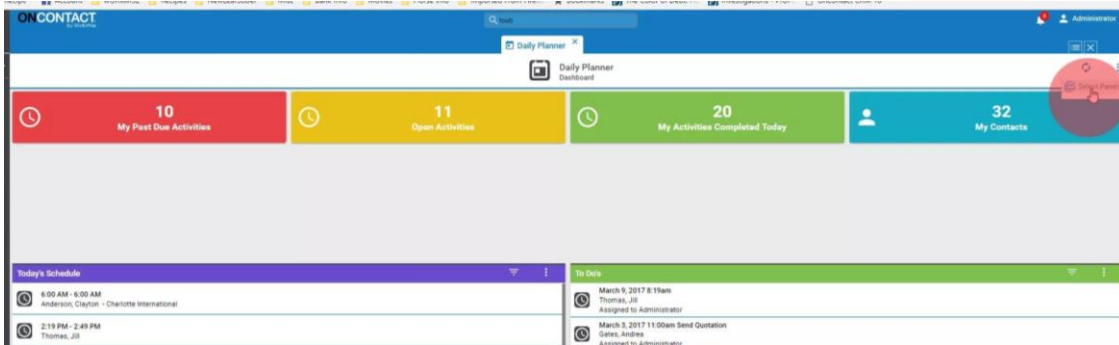


CUSTOMIZE DASHBOARD

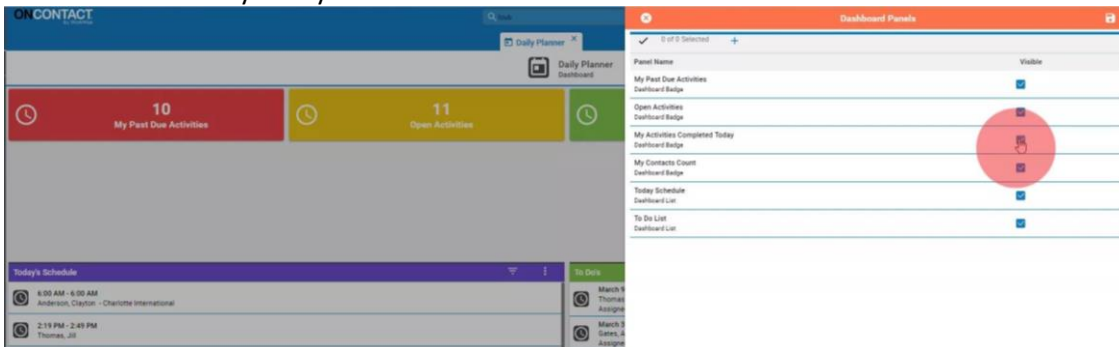
1. Each user can select the set of panels to display. Click Options



2. Click Select Panels

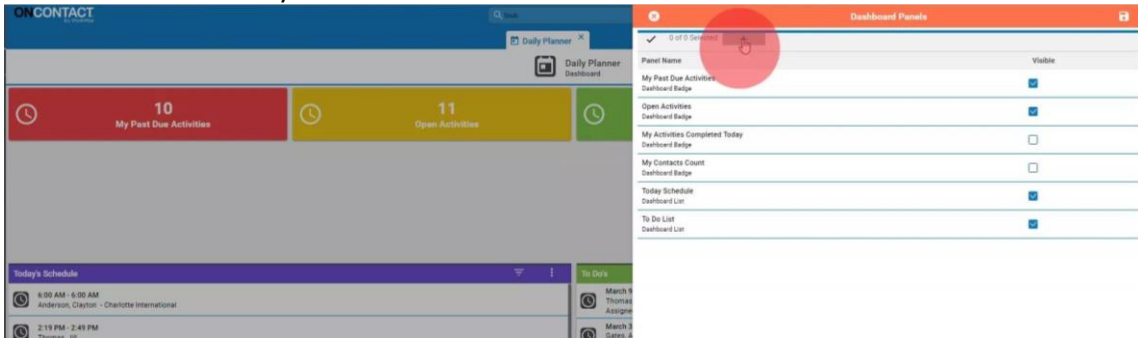


3. Uncheck any that you do not want visible.

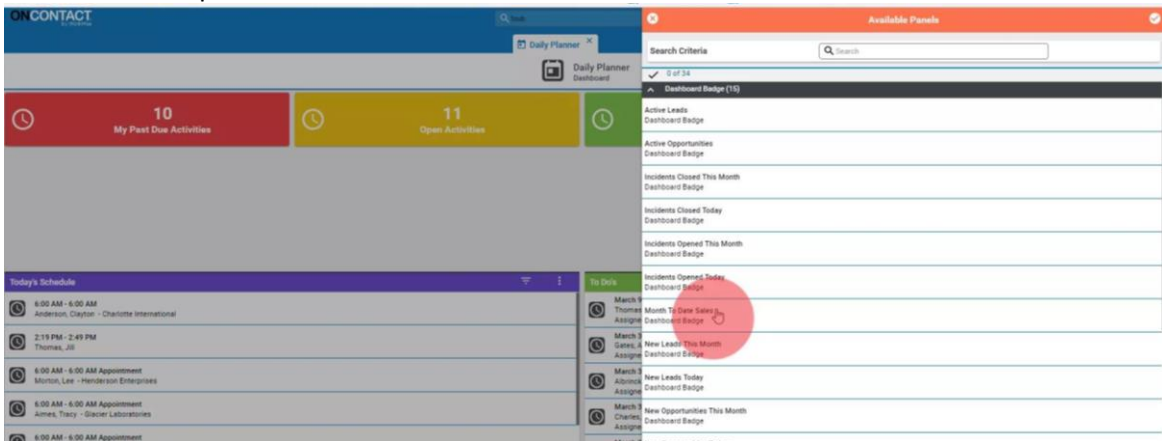


CUSTOMIZE DASHBOARD

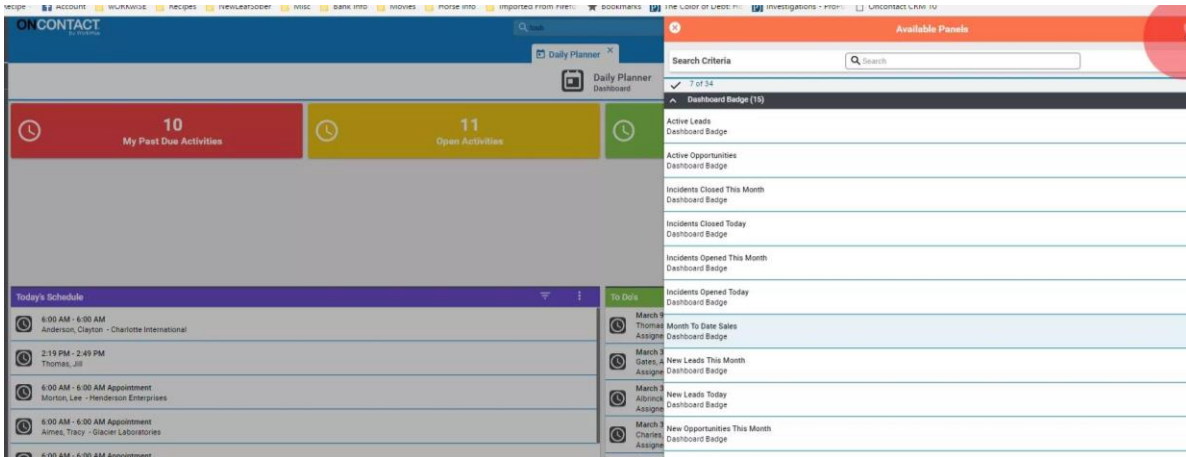
4. Click to Add any new Panels.



5. Select a panel from the List



6. Click to save it



CUSTOMIZE DASHBOARD

7. Check to make it visible

The screenshot shows the ONCONTACT dashboard with a 'Daily Planner' window open. The dashboard has three main panels: 'My Past Due Activities' (10), 'Open Activities' (11), and 'Today's Schedule'. A 'Dashboard Panels' configuration window is open on the right, listing various dashboard panels and their visibility status. A red circle highlights the 'Visible' checkbox for the 'To Do List' panel, which is currently unchecked.

Panel Name	Visible
My Past Due Activities Dashboard Badge	<input checked="" type="checkbox"/>
Open Activities Dashboard Badge	<input checked="" type="checkbox"/>
My Activities Completed Today Dashboard Badge	<input type="checkbox"/>
My Contacts Count Dashboard Badge	<input type="checkbox"/>
Today Schedule Dashboard List	<input checked="" type="checkbox"/>
To Do List Dashboard List	<input type="checkbox"/>
Month To Date Sales Dashboard Badge	<input checked="" type="checkbox"/>

8. Save your changes

The screenshot shows the ONCONTACT dashboard with the 'Dashboard Panels' configuration window open. A red circle highlights the 'Save' button in the top right corner of the configuration window. The 'To Do List' panel is now checked as visible in the configuration window.

Panel Name	Visible
My Past Due Activities Dashboard Badge	<input checked="" type="checkbox"/>
Open Activities Dashboard Badge	<input checked="" type="checkbox"/>
My Activities Completed Today Dashboard Badge	<input type="checkbox"/>
My Contacts Count Dashboard Badge	<input type="checkbox"/>
Today Schedule Dashboard List	<input checked="" type="checkbox"/>
To Do List Dashboard List	<input checked="" type="checkbox"/>
Month To Date Sales Dashboard Badge	<input checked="" type="checkbox"/>

9. Return to the Dashboard

The screenshot shows the ONCONTACT dashboard with the 'Dashboard Panels' configuration window open. A red circle highlights the 'Close' button in the top right corner of the configuration window. The 'To Do List' panel is now checked as visible in the configuration window.

Panel Name	Visible
My Past Due Activities Dashboard Badge	<input checked="" type="checkbox"/>
Open Activities Dashboard Badge	<input checked="" type="checkbox"/>
My Activities Completed Today Dashboard Badge	<input type="checkbox"/>
My Contacts Count Dashboard Badge	<input type="checkbox"/>
Today Schedule Dashboard List	<input checked="" type="checkbox"/>
To Do List Dashboard List	<input checked="" type="checkbox"/>
Month To Date Sales Dashboard Badge	<input checked="" type="checkbox"/>

CUSTOMIZE DASHBOARD

10. Your changes are displayed

The screenshot displays the ON CONTACT Daily Planner Dashboard. At the top, there is a search bar and a user profile for 'Administrator'. Below this, two summary cards are visible: a red card for 'My Past Due Activities' with a count of 10, and a yellow card for 'Open Activities' with a count of 11. The main content area is divided into two columns: 'Today's Schedule' and 'To Do's'. 'Today's Schedule' lists several appointments, including a flight for Anderson, Clayton and several 6:00 AM appointments. 'To Do's' lists tasks such as sending a quotation, product demonstrations, and conference calls.

Today's Schedule	To Do's
6:00 AM - 6:00 AM Anderson, Clayton - Charlotte International	March 9, 2017 8:19am Thomas, Jill Assigned to Administrator
2:19 PM - 2:49 PM Thomas, Jill	March 3, 2017 11:00am Send Quotation Gates, Andrea Assigned to Administrator
6:00 AM - 6:00 AM Appointment Morton, Lee - Henderson Enterprises	March 3, 2017 8:30am Appointment Albrinck, Josephine - Woodridge Architects Assigned to Administrator
6:00 AM - 6:00 AM Appointment Aimes, Tracy - Glacier Laboratories	March 3, 2017 6:30am Product Demonstration Charles, John - Henderson Enterprises Assigned to Administrator
6:00 AM - 6:00 AM Appointment Alt, Rebecca - Ash Equipment Company	March 3, 2017 5:00am Conference Call Barkley, Ivan - ABC Company Assigned to Administrator
6:00 AM - 6:00 AM Appointment Becker, Roger - Becker Petroleum Co.	March 2, 2017 2:09pm Outbound Telephone Call Bird's Swell Company Assigned to Administrator