

Understanding the main dashboard

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The dashboard is the first screen most users see after logging in. It gives you a quick overview of what is happening across HelpOne.

Common elements on the dashboard

- Recent activity (recently added or updated records)
- Upcoming events
- Campaign progress summaries (raised vs. goal)
- Outstanding tasks or follow-ups assigned to you
- Key metrics such as donations this month or active volunteers

Customizing your dashboard

Many widgets can be rearranged or turned on/off:

1. Look for a settings, gear, or pencil icon on a widget or on the dashboard itself.
2. Choose which cards you want to see.
3. Save your changes.

If a widget you expect is missing, check with your administrator. Some information is controlled by user permissions and may not be visible to every role.

The dashboard is designed to help you start your day with the most important information in one place.
