# SOP: Dashboard Management

## Objective

The objective of this SOP is to guide the user on how to effectively navigate and utilize the dashboard as an admin, covering key components such as collaborators, planning, customers, campaigns, messages, exports, notifications, unplanned teams, pending events, and pending collaborator applications.

## Key Steps

1. **Collaborators:**
   - Access the collaborators section to view an overview of all components and customize information.
2. **Planning:**
   - Click on planning to access the planning board or list view based on settings.
3. **Customers:**
   - View created customers and create new ones in the customers section.
4. **Campaigns:**
   - Create new campaigns and view the history of created campaigns in the campaigns section.
5. **Messages:**
   - Access the people chat module under messages to contact collaborators and send messages.
6. **Exports:**
   - View the history of exports, filter them, and re-download if needed in the exports section.
7. **Notifications:**
   - Check different notifications based on selected settings in the notifications section.
8. **Unplanned Teams:**
   - View teams that are not fully filled out and need additional collaborators in the unplanned teams section.
9. **Pending Events:**
   - Monitor birthdays and profile property expiration dates to contact collaborators in time in the pending events section.
10. **Pending Collaborator Applications:**
    - Manage collaborator registrations by accepting or declining applications in the pending collaborator applications section.

## Cautionary Notes

- Ensure that the views and information displayed on the dashboard are relevant to the settings, rules, and modules activated on the tenant.
- Exercise caution when accepting or declining collaborator applications to avoid any unintended actions.

## Tips for Efficiency

- Customize information in the collaborators section to suit your specific needs.
- Utilize the list view or planning board in the planning section based on your preferences.
- Keep track of campaign history and create new campaigns as needed.
- Use the messages section to communicate with collaborators within the platform.
- Filter and re-download exports as necessary for data management.
- Stay updated on notifications and pending events to manage tasks effectively.
- Regularly check the dashboard for pending collaborator applications to streamline registration processes.

By following these steps and guidelines, users can efficiently navigate and utilize the dashboard features for effective management and communication within the platform.

## Link to Loom

https://loom.com/share/903cb0e1689e4ce8adae892e728d5019?src=composer