



DASHBOARD

Using And Understanding The Home Screen

Upon logging into the Dashboard site, the first thing you will see is the home screen. It provides tools to navigate through the system as well as at-a-glance views of key performance indicators relevant to your account.

- A. On left side of the home screen, you will see the “Navigation Toolbar”. It provides icons to important areas within the Dashboard. The “Navigation Toolbar” is displayed on every page and it allows you to move around the site with ease.
 - o Starting at the top,
 - The first icon is “The Dashboard” icon, which is the main home screen that you currently see.
 - The second icon is the “My Orders” icon – this where you will go to create orders, search and track orders and view or edit orders. Please see the “How to view, edit and cancel an order” video for further information.
 - The third icon down is the “My Contacts” icon. This is where your address book and contacts reside. Please see the “How to set up my contacts” video for further information.
 - The fourth icon is the “Import” icon, this is used for bulk order creation. Training will be provided as applicable.
- B. In the center of the screen, you will see the “Today’s Orders” section, it displays:
 - o The Total, Delivered, and Active orders for the current day.
 - o Statuses are displayed alongside each category.
 - o To include or exclude a status from a category, just click on the status.
 - For example: In the Total category if you want to see “Delivered” orders, click to deselect the Received, Assigned and Picked up Statuses.
 - As you deselect a status the total number of orders at the center of the category will update based on your selection
 - o In the top right corner of this section, you will see a “New Order” button with a dropdown arrow. This is one of the ways you can create a new order. Please see the “How to create a new order” video for further information.
- C. Just below the “Today’s Orders” section you will see a graph called “Delivered Orders Per Day.”
 - o This displays the number of delivered orders per day based on service level.
 - You can include or exclude a status by clicking on the service level in the legend to the right.
 - For example: If you would like to see how many Direct orders you had deselect the other service levels.

- You will see the graph change as you deselect.
- D. The “Last Orders Created” section in the center of the screen, provides a summary of the last 6 orders created for your account.
 - To see the details of a specific order “click” on the order.
 - This will open the order in the orders table.
 - To return to the dashboard click the “Dashboard” icon on the “Navigation toolbar” on the left.
 - To view additional orders, click the “View More” link at the bottom of “Last Orders Created” section
 - This will take you to the “My Orders” table (see the “How to View, Edit and Cancel an Order” video) for further information.
 - To return to the dashboard click the “Dashboard” icon on the “Navigation toolbar” on the left.
- E. In the top right corner of the home screen, you will see the “Support Menu”. It provides icons to useful resources and tools to assist if you have any questions. The “Support Menu” is displayed on every page for easy convenience. If you hover over the icon a description will pop up to let you know what the icon is for.
 - The first icon of the left will take you directly to our Delivery Express website where you can find a plethora of information on the Dashboard site as well as information on our service offerings.
 - The second icon, the circle with the question mark in it, will take you to Delivery Express client tools, where you will find “How to videos on the Dashboard”, FAQ’s and Get More info form.
 - The third icon is a “Chat” icon. This icon opens an instant live chat with our customer service team, where you can ask questions and get immediate assistance.
 - The next icon on this support menu is a “sheet of paper with a plus sign” it is a link to create a new order. To learn more about creating a new order please see the “How to create a new order” video for further information.
 - The last icon is called “My Account”. It is where you go to log off the website or change your password. To learn more about changing your password please see the “How to change your password” video.

[DASHBOARD homepage is totally customizable for you to place, track and manage your orders online with us!](#)
[It gives you total control over your deliveries saving you time and money! Place and order today.](#)