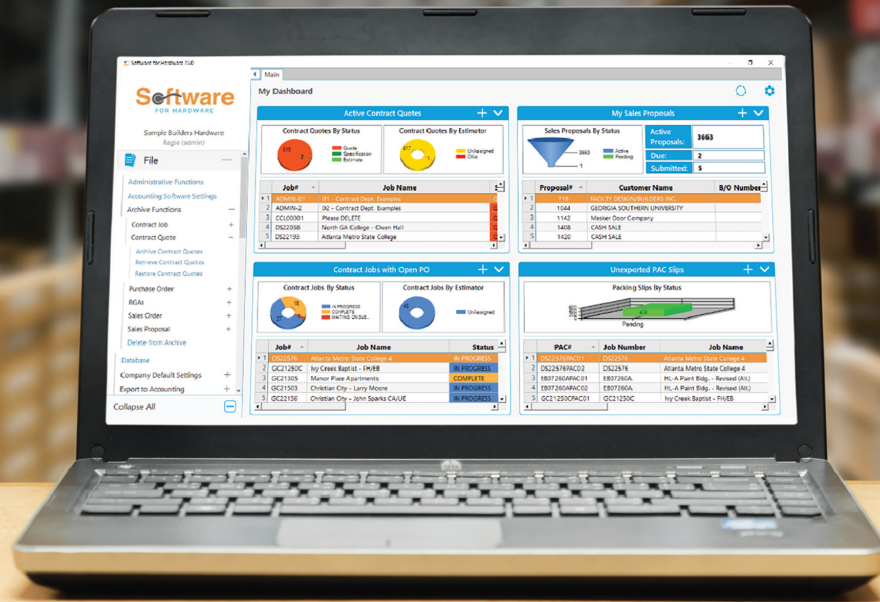# S🔗ftware
FOR HARDWARE

15.2 MANAGEMENT DASHBOARD

THE DASHBOARD

Software for Hardware proudly introduces its all-new Management Dashboard, designed to help you and your entire team be more proactive. The dashboard can alert you of action items, allow you to quickly find frequently used records, provide a brief overview of progress, and more. With 10 different selectable tiles, each SFH user can customize their dashboard to best fits their specific needs within the organization.

HOW TO USE

The dashboard requires that your company be configured with separate user logins. If you see a login screen each time you open Software for Hardware, then you are all set. This means your company is already setup with users and no further action is required to begin using the dashboard feature.

On the other hand, if you never see a login screen when opening Software for Hardware, this means

your company does not currently have separate users configured. In order to set up separate users, you must go to File > Administrative Functions. From here, you can create a user for each person in your company who needs to use SFH, including yourself. Once you have done this, the next time you launch SFH and log in, you will be able to use the dashboard feature.

ROLE-BASED	REAL-TIME
Select from 10 tiles designated for specific staff roles	See win rate, gross margin, & productivity data

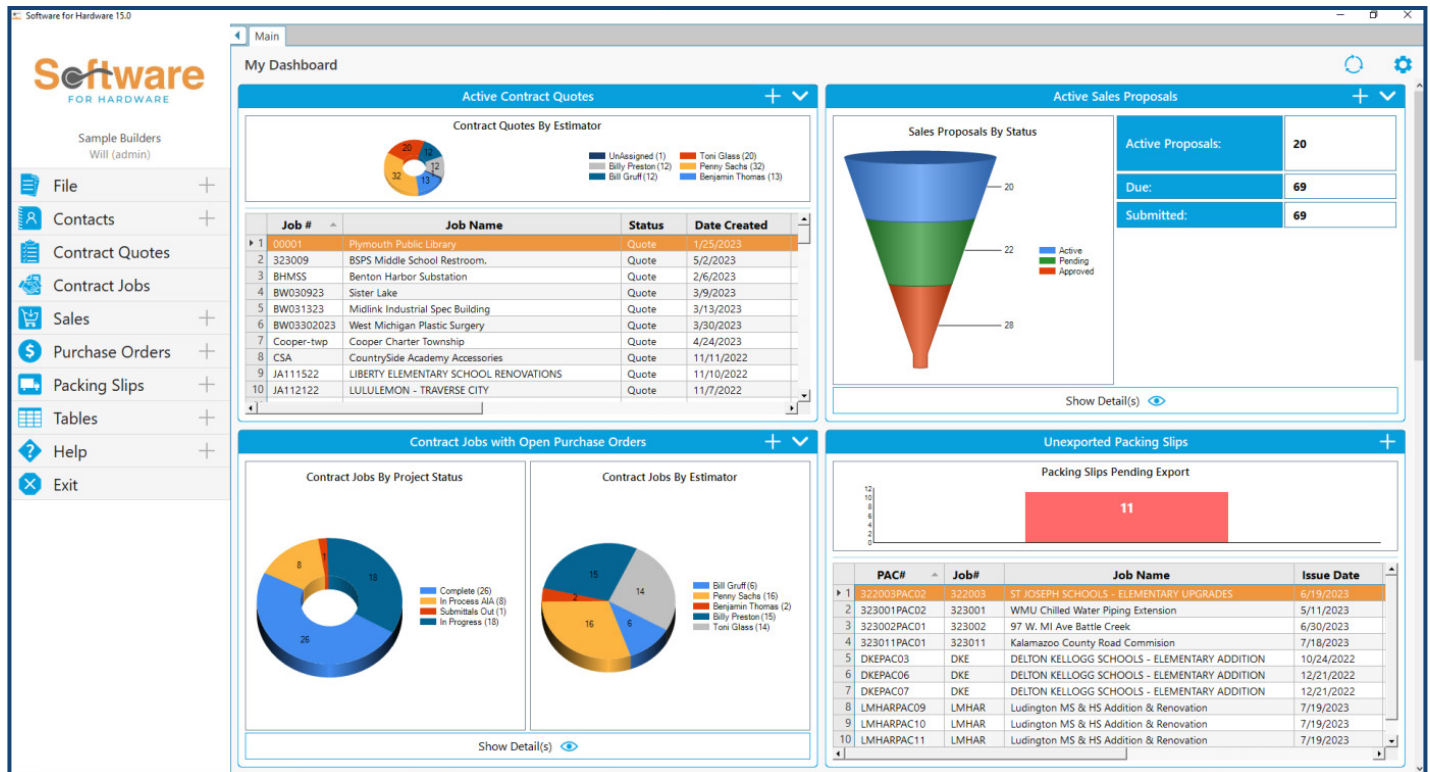| EFFICIENT	PROACTIVE
Quickly see issues that require prompt attention	Identify profitable and productive opportunities

An example of how the dashboard can be customized.

If you are not currently utilizing separate users, everyone who logs has full administrator access by default. If you decide to set up separate users, you can still mimic this behavior by checking every authorization box for each user you create, thus giving them full access. Alternatively, you can take this opportunity to carefully assign specific authorization levels to each user (we highly recommend this).

names are as follows: Active Contract Quotes, Active Sales Proposals, Closing Ratio, Contract Jobs with Open Purchase Orders, Gross Profit Margin, Important External Documents, Open Change Orders, PO Status Quick Action, Unexported Purchase Orders, and Unexported Packing Slips.

These tiles can be swapped in and out for every user so that the user only sees information relevant to them.

FEATURES

The dashboard will now be the first thing you see when launching Software for Hardware, replacing the old splash screen with live useful information. While working in SFH, you can view the dashboard at any time by switching back to the "Main" tab on the top bar.

The dashboard currently has 10 customizable tiles, with more tiles to come based on customer feedback. Their

QUESTIONS?

For in-depth information on each tile's functions and features, as well as instructions and FAQs, please see our full 15.2 Dashboard documentation. And if you have further questions, feel free to email us at support@softwareforhardware.com. **We hope you find great use in the SFH Management Dashboard!**