



Crimson: Home Dashboard Layout Customization

With this customization tool, you can add, remove, or move items on your **Home Dashboard**. This will allow you to tailor your home dashboard to your needs. These custom settings will be saved to your user account, and will be applied to the unique database you save them in.

Customizing the Home Dashboard

- To start editing your home dashboard, hover over the  customization icon at the bottom of the screen.



- Click the green icon that appears below .
- This will enable customization mode. Hover over the Dashboard items prompting you to Remove, Add, or Move them.

My Dashboard

393,220 Total\$ (CTD)

291,882 Primary 2022 74% 101,337 General 2022 26%

2,085 People

1,953 Donors (All-Time)

4 Thank You Needed (Last 3 Months)

\$100 Pledge Outstanding (CTD) 1 Gifts





Fundraiser Portfolio

2 Records Assigned \$535,450.86 Total Raised (CTD) 6 Total Open Moves 13 Total Incomplete Tasks

\$100 Total Pledges Outstanding (CTD) 4 Thank You Needed (Last 3 Months)

Search for Gift Officers

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- Remove** – Click  to remove an item from the dashboard view
- Add** – Click  to add an item to the dashboard view.
- Move** – To move panels locations on the Home Dashboard, simply click and drag a panel to a new spot in the list.
- Once you have made your changes, click the  button in the customization icon to save your changes or  to cancel.