

Agent DASHBOARD®

User Guide

How-To Video:
Customize your Dashboard

"Stoplight Menu":
Reveals widgets that can be added to your Dashboard

"Burger" Menu:
Shows descriptions of the Account Tools

Padlock Tool:
Unlocks Dashboard for customization

Dashboard Widgets:
Can be resized by dragging green triangle, moved by clicking on the widget title and dragging to a different spot, removed by clicking the "x" and if available, the opposing arrows can be used to sort the widget contents

Account Tools:
Click icons to see different parts of your Instanet account
(For more details, refer to the [Account Tools User Guide](#))

"Blue Burger" Rolling Menu:
Click to see 3 tools:
1. **Question mark** for help
2. **Voice bubble** to leave feedback
3. **House + icon** to start a transaction

Account Owner's Name
Welcome, Mr. Phil Dunphy Jr.

The dashboard interface includes a top navigation bar with a "Burger" menu icon, a "How-To Video" link, a "Stoplight Menu" icon, and a "Blue Burger" rolling menu. The main content area features several widgets: "Transactions" (with a "Create Transaction" button), "Authentisign" (with a "Start Signing" button), and "Documents". Each widget has a title, a list of items with details like "Transaction" and "Modified" dates, and a "Go to" link. A vertical sidebar on the left contains "Account Tools" icons. At the bottom, there is a "Blue Burger" rolling menu with icons for help, feedback, and starting a transaction, and a footer displaying the account owner's name.