

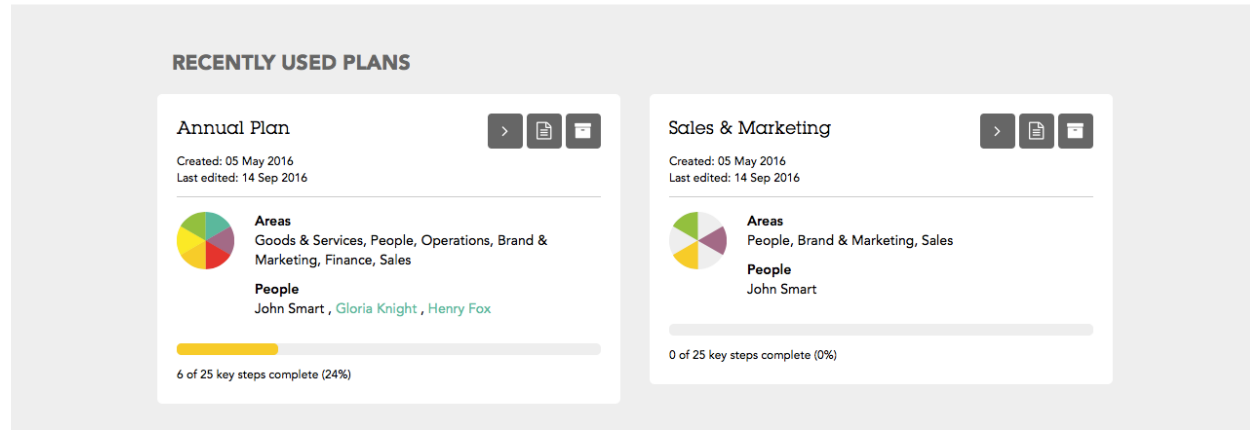
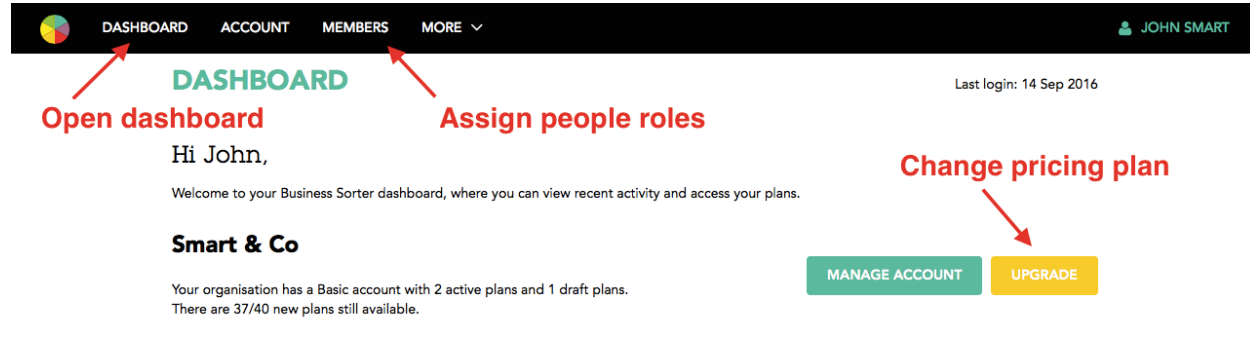
## How to use your dashboard

If you're new to Business Sorter, this article will help you get started.

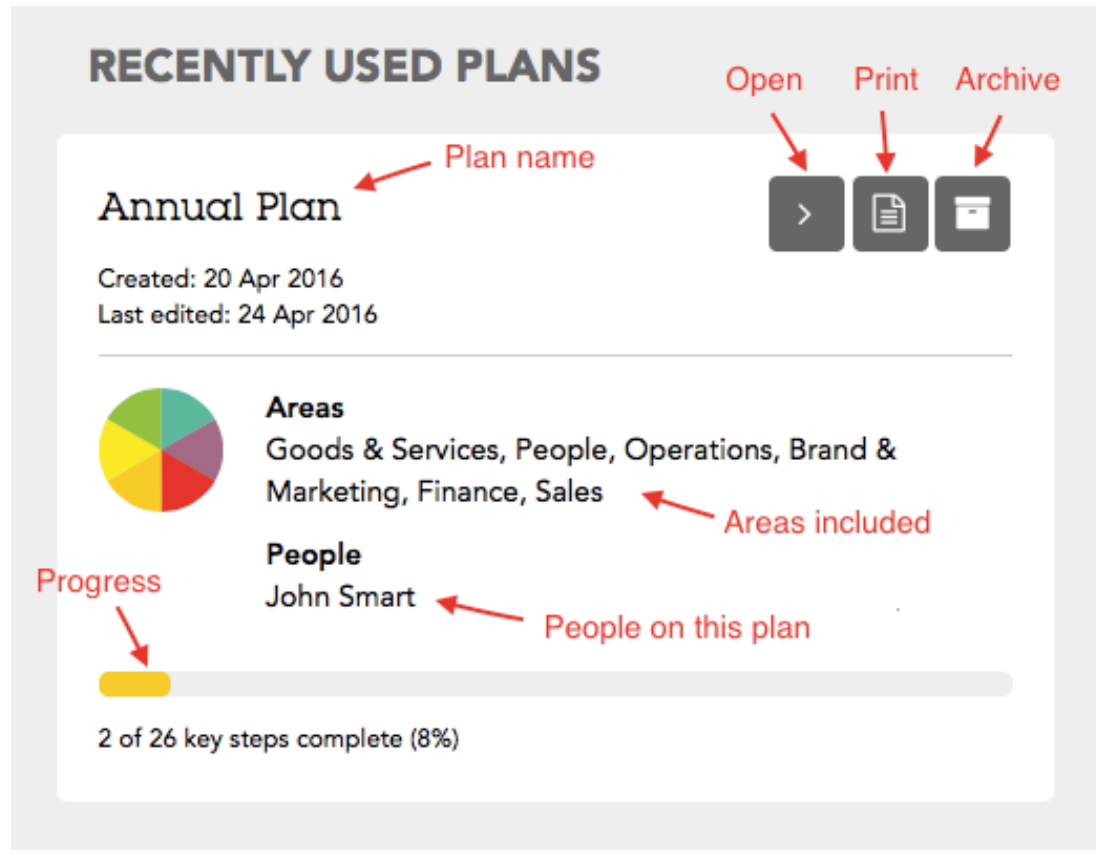
On your dashboard, you can find and access all your plans as well as start new plans. You get to it by clicking on 'Dashboard' in the main menu. You can also change your pricing plan from your dashboard, by clicking on the yellow 'Upgrade' button.

Please note: When you share the Business Sorter app with a colleague, initially they won't see any plans or activity on their dashboard. To get someone started, go to the 'Members' page and assign them one of the following roles:

- A. Make them a Team Leader on a plan.
- B. Make them a Team Member on a plan AND assign them a task on that plan.

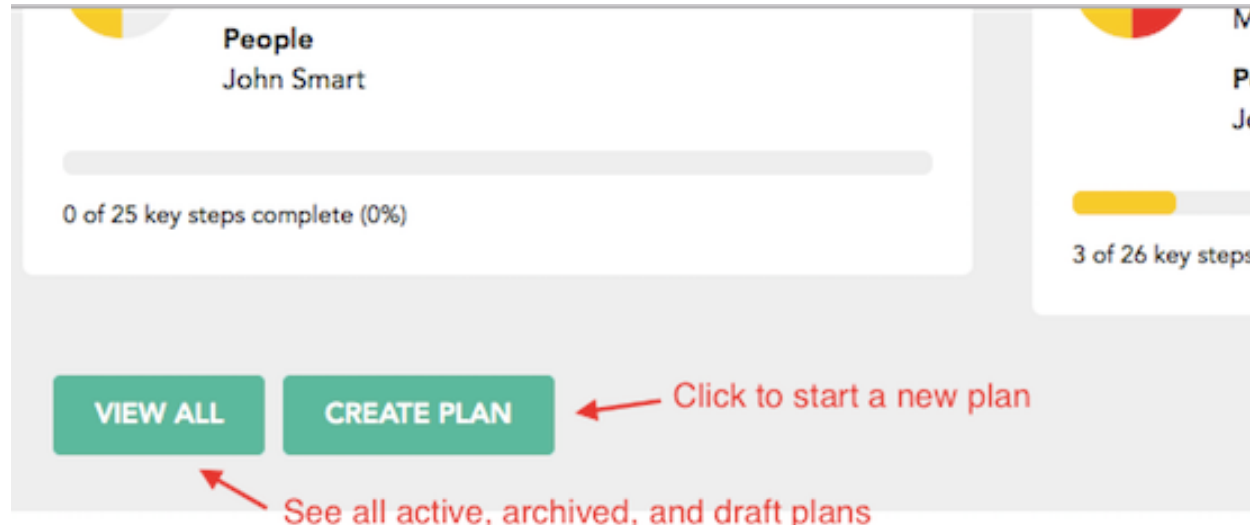


The plan summaries give you an overview of each plan. You can also open the plan, print it, or archive it from the summary.



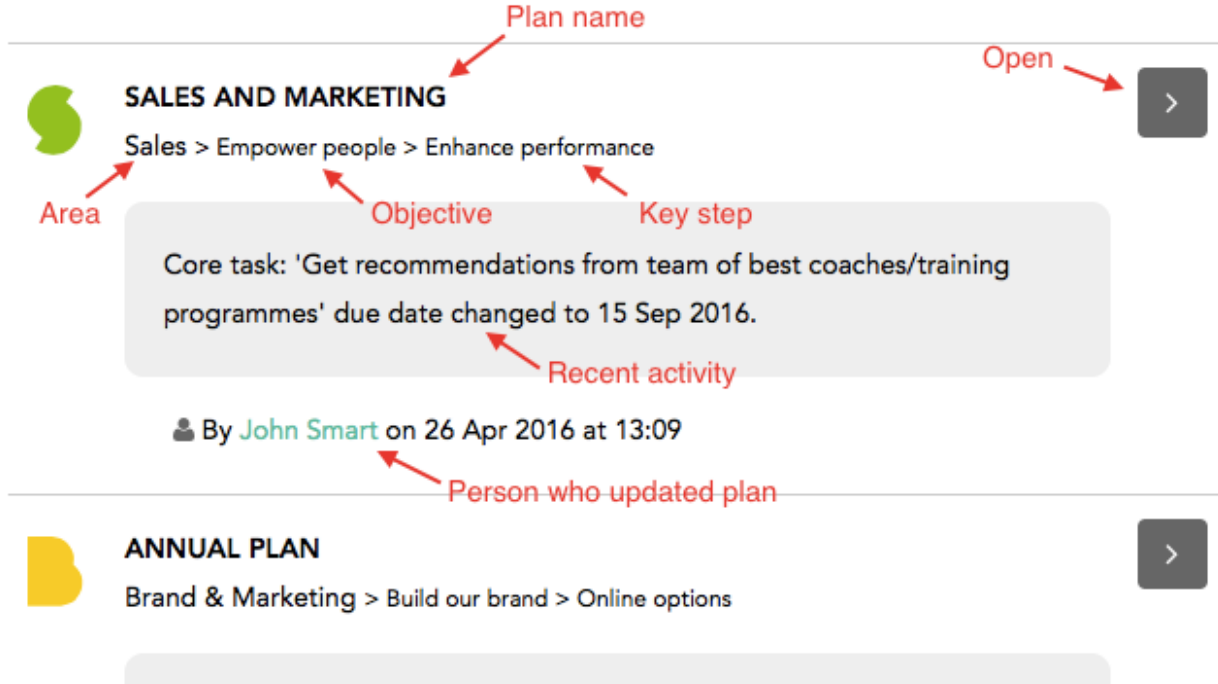
If you scroll down your dashboard, just below 'Recently used plans' you'll see two buttons. Click on 'View all' to see all your plans, or click 'Create plan' to start a completely new plan.

Please note: If you start creating a plan and have to stop before you're finished, the plan will automatically be saved in 'Drafts', which you can access from 'View all'.

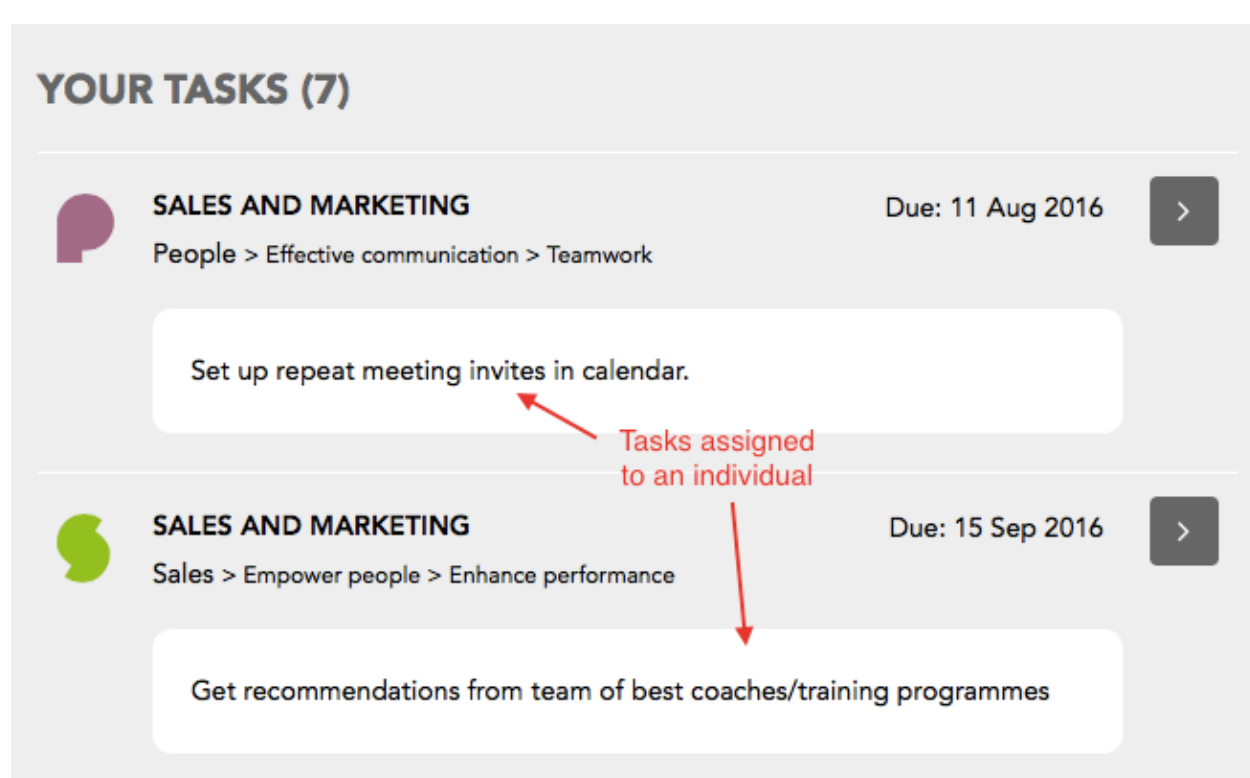


Just below the two buttons you'll see 'Recent activity', which shows you what people have been doing across all the active plans on your Business Sorter account.

### RECENT ACTIVITY



When you scroll to the bottom of 'Recent activity', you'll see 'Your tasks'. This provides each individual with an overview of the tasks they have been assigned, including the due date.



On the dashboard, you can also access 'More' in the main menu, which takes you to the FAQ, Apps, Guide, Resources, and Contact pages.

