Dashboards

advatra gives you the ability to personalize your start page, the company overview and also the location overview. You can add new widgets on the three dashboards and order it the way you like by simply drag and drop.
These widgets are controlled by the roles a user have. So it is possible, that one user sees more widgets than another.

1. If you first log in into advatra, the system tells you to add a new widget. Just click on the button "Add".
2. Then you will see a list of all available widgets. It is good to start with these four: Current trips, To-Do's, Unassigned emails (if you have connected M365) and Events.
3. If you are done, just click finish on the bottom left.

If you want to edit the order, add or delete a widget, just click "Customize" on the bottom left.
Just repeat these three easy steps for each dashboard: Start page, company overview, location overview.

Start page

Click on the advatra logo.

> **We recommend the following widgets:**
> Unassigned emails, To-do's, Events, Current trips

Company overview

Menu ? Companies ? Choose a company

> **We recommend the following widgets:**
> E-Mails, To-do's, Location, Files, Documents, Notes, Master data

Location overview

Menu ? Companies ? Choose a company ? Choose a location

> **We recommend the following widgets:**
> E-Mails, To-do's, Location, Files, Documents, Notes, Master data