

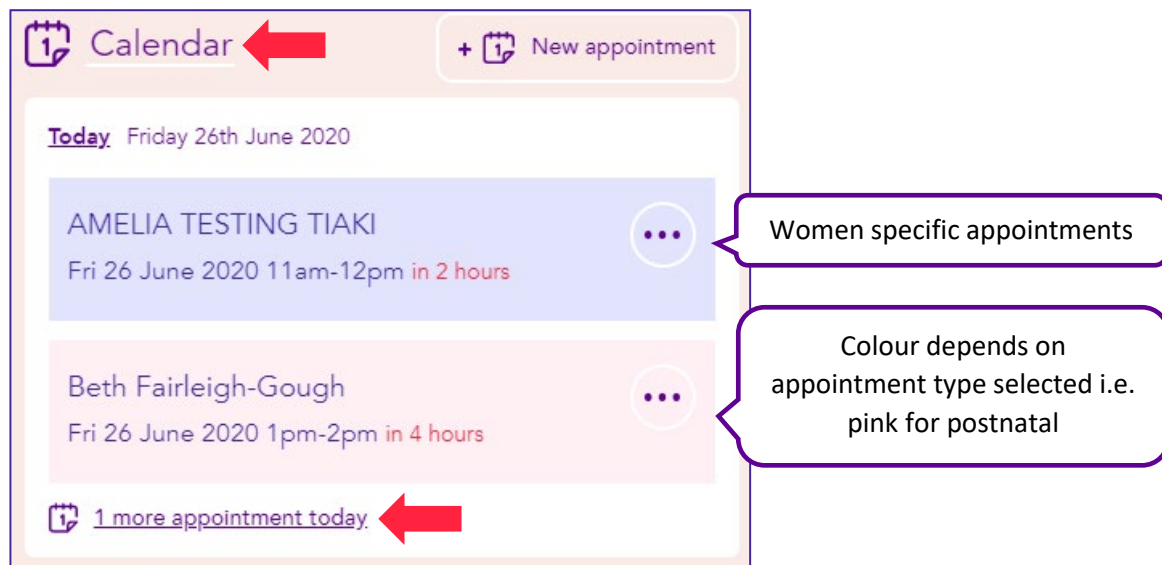
Tiaki Dashboard

Purpose

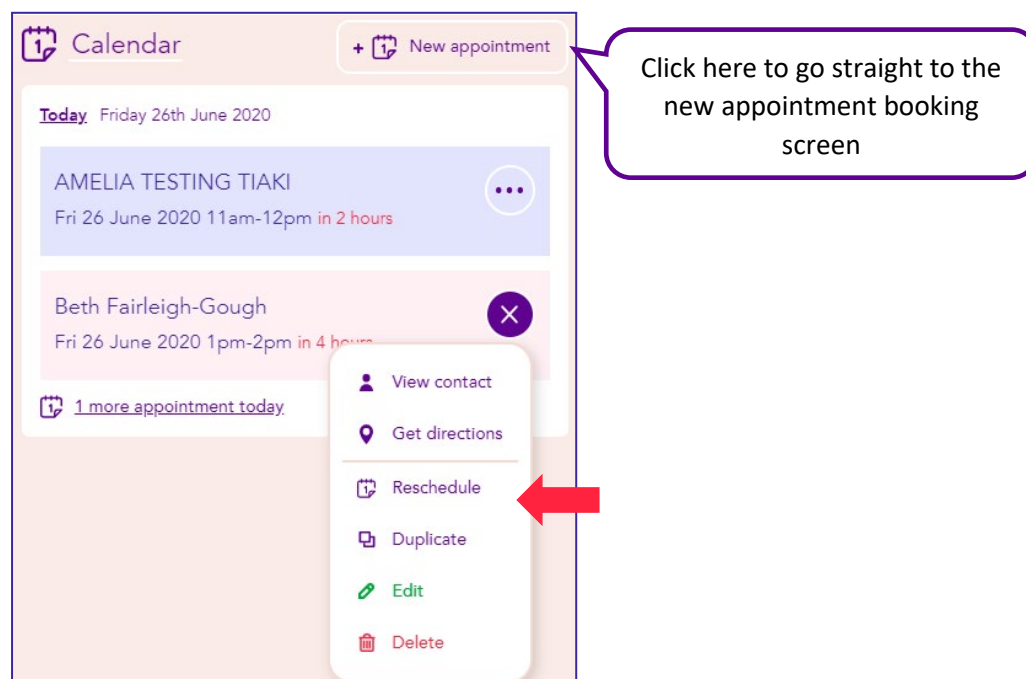
The purpose of this document is to outline key tasks and items that are displayed on the Tiaki dashboard

Calendar

To the left of the dashboard you will see today's first two upcoming appointments. If you have more than two appointments in a day you will see a note display underneath these to indicate how many more appointments you have, if you click on it Tiaki will take you through to your calendar on today's view. You can also click the 'Calendar' sub heading to go through to your calendar tab.

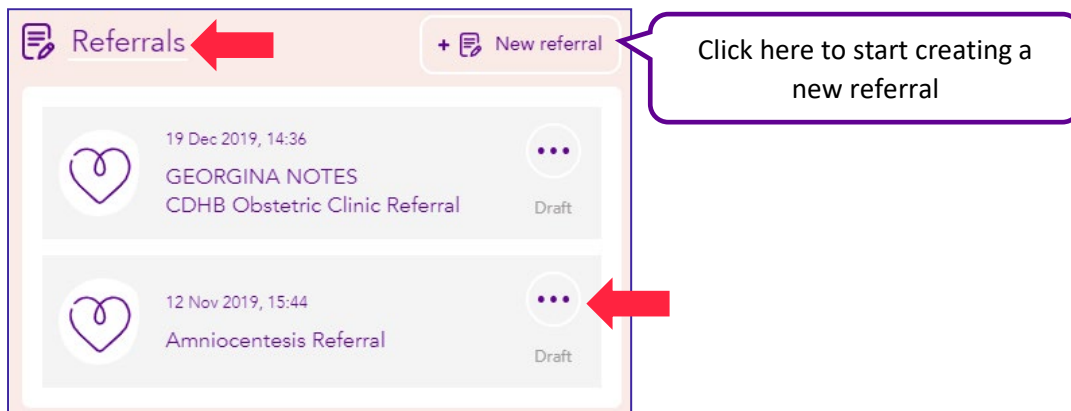


From each appointment on the dashboard you can complete several actions by clicking the three dots, meaning you don't have to click any further, you can view each contact, get directs or make changes to the appointment.



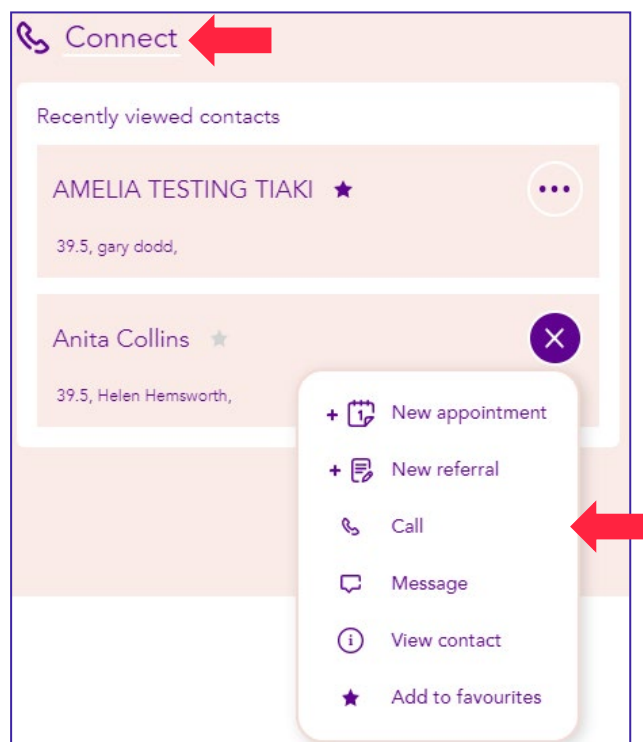
Referrals

To the right you will see your last two draft referrals that are yet to be completed. You can edit or delete the draft by clicking on the three dots next to the women's name. You can also click on the 'Referrals' sub heading and this will take you through to the Referrals tab.



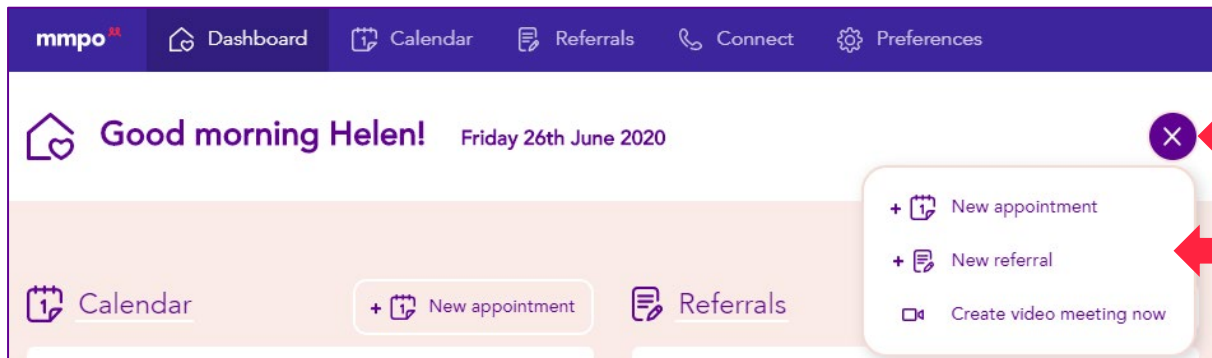
Connect

Continuing down the right below the referrals you will see the sub heading for Connect. Here you will see the last two contacts you have viewed. This will change as you view different contacts. Again you can click the 'Connect' sub heading to go through to your Connect tab. By clicking the three dots next to the women's name you can add a new appointment, new referral, call, message, view contact or add as a favourite.



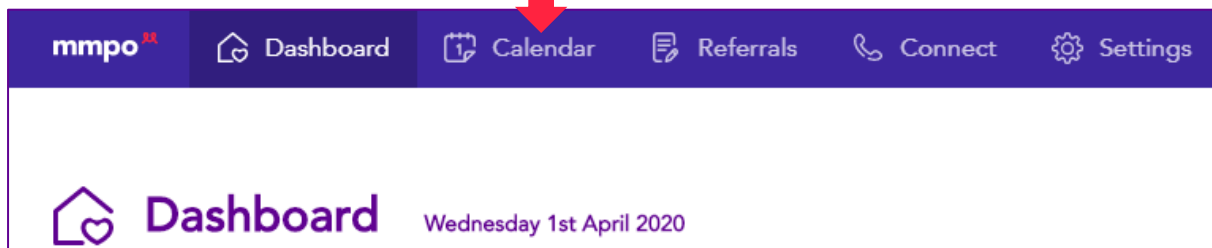
Quick actions

The last quick action we have on our Dashboard is at the top of your screen to the right. By clicking these three dots you will be able to create a new appointment, a new referral or create an instant video meeting.



Moving throughout Tiaki

Moving through Tiaki is easy, the banner at the top will be available in each section, just click the module you are after.



There is also a second smaller banner, allowing you to move easily through each module.

