

DAD 2.0 Desktop



The DAD Desktop has a list of Actions that can be selected from the main dropdown and five navigation shortcuts.

- Selecting the Desktop button returns to the Desktop home page.
- Selecting the Client button returns to the last Client Record viewed.
- Selecting the Service Request button returns to the last Service Request viewed. If the last viewed Service Request is not associated with the last viewed Client, the last viewed Client is changed to the Client associated with the last viewed Service Request.
- Selecting the Project button returns to the last Project viewed.
- Selecting the Time button navigates to the time entry homepage and the Timesheet and Employee Time Report options.

If the logged in account has not viewed a Client, Service Request, or Project, the system will return a notice that no Client, Service Request or Project has been viewed before so there is not a last viewed item.

The Desktop reflects your settings from the Preferences selected for that employee login.

All items can be displayed regardless of Preferences selected by choosing the item from the Actions dropdown menu.

The display options are divided into Primary, Associated, Team, and Agency categories. The assignment category is specified from each Client, Service Request and Project.

Desktop and Project searches have both an advanced and basic mode and can be selected from the Actions dropdown menu if not specified in the Preferences.