Introduction to the New-Look Dashboard

When you are logged into MyAccount, it opens the home page, called the ‘dashboard’.

If you have just created your account and this is the first time you have logged into MyAccount, your dashboard will look like this:

If you are a returning user and have previous activity on your account, your dashboard should look something like this:
The dashboard has a number of features:

‘**Start New Filing**’: Selecting this will open the forms which are available under two headings ‘new charity’ and ‘existing charity’.

![Image of New Charity and Existing Charity sections](image)

‘**Overview**’: If you have had activity on your account, this will display a ‘doughnut’ summarising the activity and a list of Submission Filings.

![Image of Overview section](image)
Click on the relevant heading in the Submission Filings list, or click on the associated colour in the doughnut, to view those filings.

‘Events’: this is a list of any recent submissions and messages.
‘My Charities’: If you have access to registered charities, they will be listed at the bottom of the screen.

You will also notice that there are a series of tabs down the left hand side of the dashboard, detailed below:

**New Filing**
You can start new filings from this area.

**My Filings**
You can search and review your filings from this area. The views are presented in tabs to assist, complete with filtering functionality to refine your search.
Messages

Under ‘Messages’, you can see all the messages you plan to send (drafts), messages you have sent and the inbox consisting of messages which you have received from us. You can see this in three tabs as well as the filtering functionality to refine your search.

Account

Under ‘Account’, you can maintain the account and user profiles. You can view and edit account details. The facility also provides you with a listing of all users under your account. You can edit and add/remove users from your account.

To edit your own profile click on the icon at the top right of the dashboard and select ‘My Profile’.

Help

Clicking on the ‘Help’ option at any stage will bring you to the user guide for that page or form.

All the user guides are also available on our website.