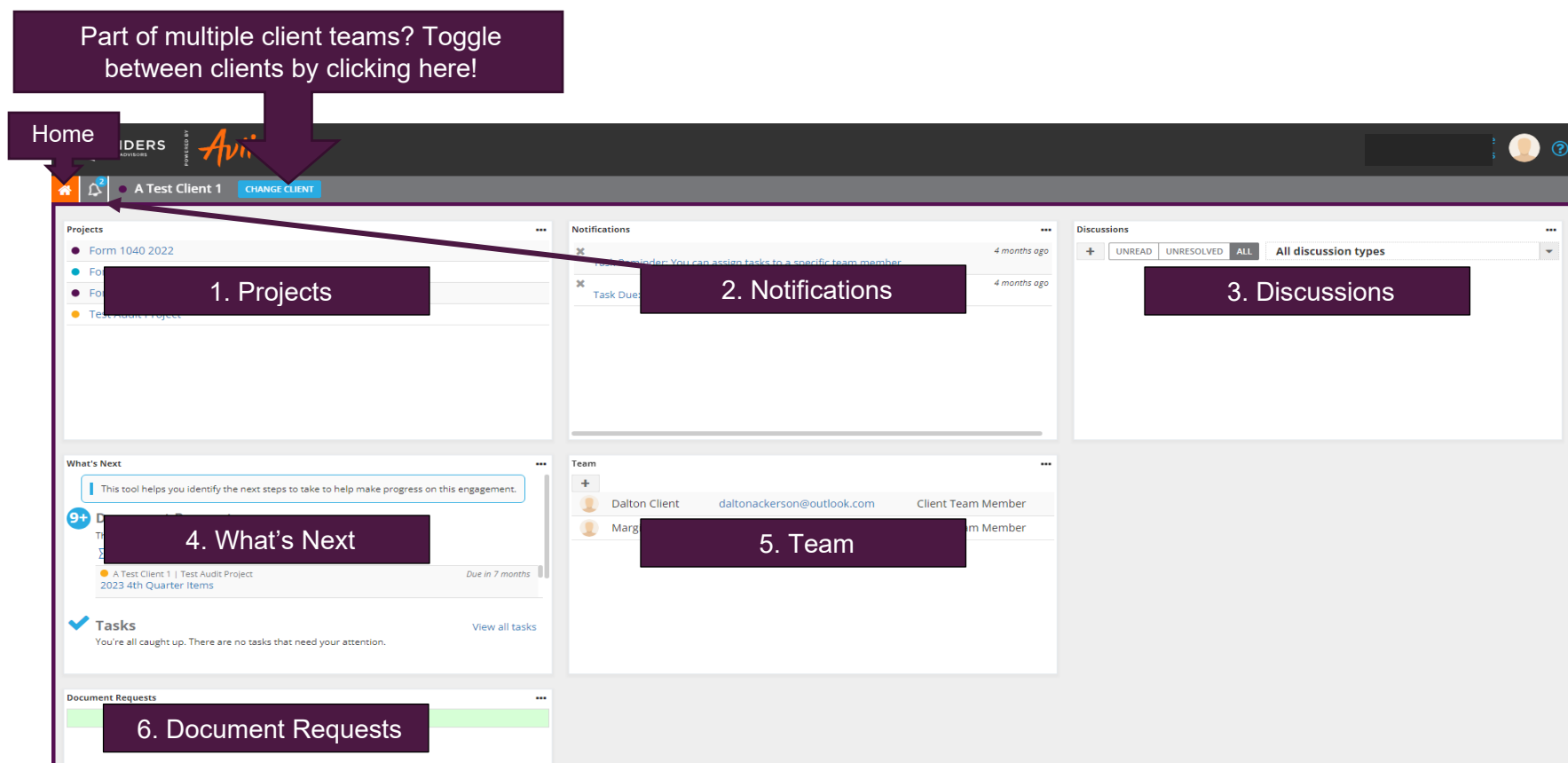


CLIENT HOME DASHBOARD LAYOUT

Part of multiple client teams? Toggle between clients by clicking here!



The screenshot shows the Client Home Dashboard layout. At the top, there is a navigation bar with a 'Home' button, the 'ANDERS CPAs + ADVISORS' logo, and a 'CHANGE CLIENT' button. Below the navigation bar, the dashboard is divided into several sections. A callout box at the top left points to the 'CHANGE CLIENT' button with the text 'Part of multiple client teams? Toggle between clients by clicking here!'. The dashboard sections are numbered as follows:

- 1. Projects: A list of projects, including 'Form 1040 2022' and 'Test Audit Project'.
- 2. Notifications: A list of notifications, including 'Task Due' and 'You can assign tasks to a specific team member'.
- 3. Discussions: A section for discussions, with filters for 'UNREAD', 'UNRESOLVED', and 'ALL'.
- 4. What's Next: A section for 'What's Next' tasks, including 'A Test Client 1 | Test Audit Project' and '2023 4th Quarter Items'.
- 5. Team: A list of team members, including 'Dalton Client' and 'Marg'.
- 6. Document Requests: A section for document requests, with a green bar indicating 'You're all caught up. There are no tasks that need your attention.'

1. **Projects** – A list of all projects. Click on a project to go to that project's workspace to submit documents and more.
2. **Notifications** – Activity Notifications: new document requests, discussions, etc.
3. **Discussions** – View or start discussions with Anders and/or team members. Other discussion tools in the project & request list.
4. **What's Next** – A summary of all activities across all projects. This tool also in each project.
5. **Team** – A list of all people on the team including Anders members and your internal team members.
6. **Document Requests** – ONLY non-project documents. Go to project for required project documents.