



# Customer Profile – Overview Page

## IWDS 2.0 TECHNICAL TRAINING DOCUMENTS



### Purpose

This document is intended to explain how to view and use the Customer Overview section of the Customer Profile in the IWDS 2.0 System.

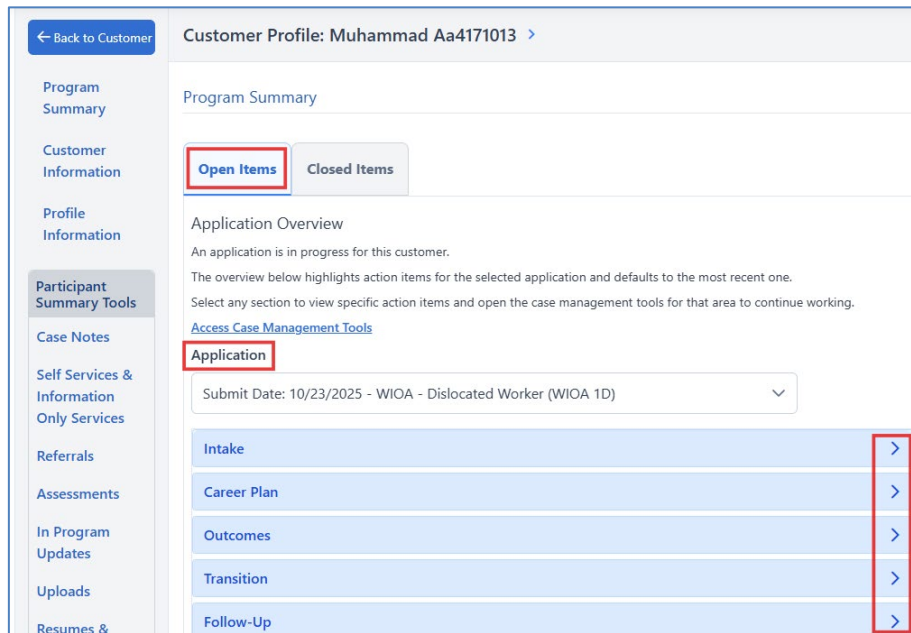
### Audience

This document is designed to guide both trainers and end users through the process of viewing and utilizing the Customer Overview Page in the IWDS 2.0 system.



### Navigate to Customer Profile – Overview Page

- Log into IWDS 2.0. ([Link](#))
- From the Customers page, select the Customer last name. The customer must have an application.
- In the customer profile, in the **Open Items** tab, use the **Arrows** to view the customer application.
- Expand sections using the arrows and the Action Items will display.
- Select **Go To Intake** or **Go to Career Plan** buttons to navigate to application sections.



## IWDS 2.0 Site



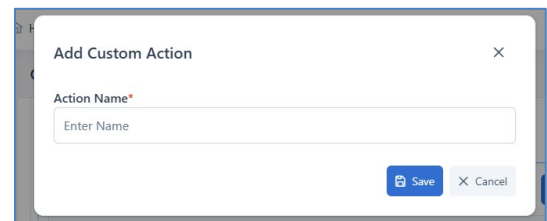
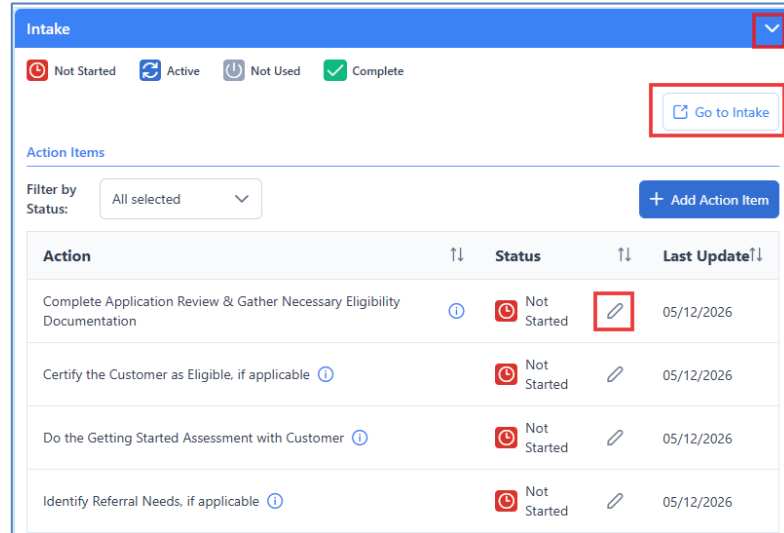
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### Overview Page Details

- The Overview Page contains 3 sections.
- **Program Summary** – This section breaks the application down into categories. Expanding Intake with the arrow will display appropriate action items for the customer. Use the **Edit Pen** to Update Status for an item.
  - **Note** – Select **Go To Intake** button to view intake information in greater detail. Use the **Add Action Item** to add Custom action items.
- **Program Services** – This is section allows for view of the customers Application and corresponding services status and dates at a glance.
- **Customer Information** – This section shows the customer’s information such as phone, email, demographics and contact information for Additional Contacts.
  - **Note** – Select **Edit** or **Add Contact** buttons to make changes and add additional information



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### [IWDS 2.0 Site](#)

