1place Home Screen

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Overview of the Home Screen

Dashboard

See your data metrics in one place! The **Dashboard** gives you a glimpse of all your customers, sales, inventory and other business data metrics summarized in one screen.

Top (section)

The numbers reflected for each record type below are real time data. If you click each sub-section, it will open up a new tab and bring you to the List screen per record type.

- **Total Customers**
- **Total Quotes**
- **Total Sales Orders**
- **Total Invoices/Credits**
- **Total Items**
- **Total POs (Purchase Orders)**

Sales Order Statuses (section)

- This shows the real-time count per status.
- You can choose to display either a **doughnut chart** or a **pie chart**.
- Note: Switch buttons are at the top right corner of the sub-section box.

My Open Orders (section)

- Shows the real-time total count of your open orders.
- Note: Clicking on any Sales Order in this section will lead you to the Sales Order Detail screen.
- Clicking '**More**' (bottom right of the section) will lead you to the **Sales Order List** screen.

Total Invoices (section)

- You can choose to display either a **bar** or a **line** graph of the total Invoices for the last month.
- Note: Switch buttons are at the top right corner of the section box.

Sales Quotes (section)

- This shows the daily, weekly, monthly, quarterly and yearly count of the Quotes you created over the total Company quotes.

Sales Orders (section)

- This shows the daily, weekly, monthly, quarterly and yearly count of the Sales Orders you created over the total Company Sales Orders.

Customers added this year (section)

- This section displays the list of new Customers added for the current year.
- Note: Clicking '**More**' (bottom right of the section) will lead you to the **Customer List** screen.

The Left Navigation Bar

This part always stays on your screen for easy navigation. A new screen (or tab) opens up every time you click on any button which allows you to multi-task.

Quick Access Keys

- These three (3) green buttons are your quick access to add and find records as well as look at list of records and reports.

Records List

- Click on a menu item on the left side of the screen to see a 'List' of records of that type. (i.e. Customers, Vendors, Items etc)