

# Dashboard - How to Use the Dashboard to Monitor and Navigate Your Work

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## Overview

The **Dashboard** provides a quick view of activity across 1place.cloud and gives you direct access to commonly used records.

Use the Dashboard to quickly:

- See overall counts for customers, quotes, sales orders, invoices/credits, items, and purchase orders.
- Identify how many Sales Orders are in each status.
- Open a list of records directly from the Dashboard.
- Open a specific Sales Order from your open orders.
- Review recent invoice activity and sales activity.
- See customers added during the year.

Instead of navigating through multiple menus, the Dashboard can be used as a **starting point for reviewing activity and going directly to the records you need to work on.**

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## Using the Dashboard as a Starting Point

When you first access 1place.cloud, the Dashboard gives you an overview of activity in different areas of the system.

The information displayed can help you determine **where to go next**

For example, you can:

- Check the **Sales Order Statuses** to see how many orders are currently in Picking or To Dispatch.
- Review **My Open Orders** to see your open Sales Orders.
- Check **Total Invoices** to review recent invoice activity.
- Review the **Sales (Quotes)** and **Sales (Orders)** sections to see sales activity over different periods.
- Review **Customers Added This Year** to see recently created customer records.

The Dashboard is therefore useful as a quick **check-in point before beginning your work**

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## Using Dashboard Totals to Access Record Lists

The totals displayed at the top of the Dashboard are also shortcuts to their corresponding lists.

| Dashboard Total          | Opens                        |
|--------------------------|------------------------------|
| Total Customers          | Customer List                |
| Total Quotes             | Quotation List               |
| Total Sales Orders       | Sales Order List             |
| Total Invoices / Credits | Invoice & Credit Memo's List |
| Total Items              | Item List                    |
| Total PO's               | Purchase Order List          |

For example, rather than opening **Customers** from the menu and then going to the Customer List, you can click **Total Customers** directly from the Dashboard.

This makes the Dashboard a convenient starting point when you already know which area of 1place.cloud you need to access.

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## Using Sales Order Statuses to Identify Orders to Work On

The **Sales Order Statuses** section shows the number of Sales Orders currently in each status.

Each status can be selected to open the corresponding **Sales Order Status** screen.

For example:

**Picking → Sales Order Status (Picking)**

**To Dispatch → Sales Order Status (To Dispatch)**

This is useful when you want to focus on a particular stage of the Sales Order process.

For example, seeing orders in **Picking** gives you a quick way to go directly to those orders rather than searching through the complete Sales Order List.

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# Using My Open Orders to Access Sales Orders

The **My Open Orders** section displays your open Sales Orders.

Each order can be opened directly from the Dashboard.

Click the **Order #** to open that order's **Sales Order** screen.

This is particularly useful when you need to continue working on an order without searching for it from the Sales Order List.

Click **More...** to open a new tab to the Sales Order List.

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## Reviewing Sales and Invoice Activity

The Dashboard also provides a quick way to review recent activity without opening a separate report.

### Total Invoices

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The **Total Invoices** chart displays invoice activity for the **last 30 days**.

Use the chart to quickly see how invoice activity has changed from day to day.

### Sales (Quotes)

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The **Sales (Quotes)** section shows quote activity for different periods, including:

- Today
- Last 7 Days
- Last 30 Days
- Last 90 Days
- Last 365 Days

### Sales (Orders)

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The **Sales (Orders)** section provides similar information for Sales Orders.

These sections allow you to review activity over different time periods without having to manually run a report.

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## Reviewing Recently Added Customers

The **Customers Added This Year** section provides a quick view of customers added during the current year.

The list shows the **Company Name** and **Date** the customer was added.

Click **More...** to open a new tab to the Customer List.

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