SHERKETYERP

Accounting Dashboard

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Accounting Dashboard

The Accounting Dashboard is the starting point for journal work. A journal card summarizes one
accounting journal and brings together its entry points, so you can open transactions, payments,
invoices, bills, journal entries, reviews, reports, or configuration from the relevant card.

If you need to…	Go to
Reach the Accounting hub	Find and open the dashboard
Read a journal's balances, counts, or graph	Understand the journal cards
Start invoice, bill, payment, transfer, or entry work	Choose a journal entry point
Work out why an action or card is different	Handle journal and access branches
Continue into journal activity	Accounting journals and bank activity
Continue into invoices and related records	Customers, products, and invoices
Continue into payments	Payments and follow-ups
Continue into analysis and audit work	Reports and audit work

Before you start

The dashboard shows journal cards and actions according to the journal type, journal data, and
your accounting access. A card can therefore offer a different set of actions from another card.

Prerequisites

- Your account has access to the Accounting Dashboard.
- You know which work you need to start: bank or cash activity, sales or purchase documents, or

general journal entries.
- For actions that create or post accounting records, your access includes the required accounting group. The available actions also depend on the journal's data, such as its statement source and counts.

Find and open the dashboard

Open the Accounting Dashboard from **Accounting** > **Dashboard** to reach the journal card view.

Prerequisites

- You have access to the Accounting area.

Steps

1. Open **Accounting**.
2. Select **Dashboard**.
3. Confirm that the page opens the journal cards rather than another page.

Result: The dashboard opens the journal card view with the dashboard filter context.

Understand the journal cards

Each card identifies its journal, shows the amounts and counts relevant to that journal, and offers the next accounting action.

On the card	What to read
Journal identity	The journal name, company name when shown, and journal alias when applicable
Bank or cash information	**Balance**, **Last Statement**, **Cash In**, **Cash Out**, **Payments**, and **Misc. Operations** when their conditions are met
Sales or purchase information	Draft, unpaid, late, and to-check counts with their related amounts
Journal graph	The dashboard graph for bank, cash, sale, or purchase journals
Activities	Select **See all activities** to open the activity list for the journal
Sequence warning	**Gaps in the sequence** when the journal has sequence gaps

The card body follows the journal type. Bank and cash journals use the bank/cash body; sale and
purchase journals use the invoice/bill body; general and situation journals use the journal-entry
body. Rows with no relevant count do not appear.

When a sequence warning appears, hover over **Gaps in the sequence** to read: `Gaps due to canceled invoices, deleted entries or manual errors in open period.`

Choose a journal entry point

Use the journal card that matches the work you are about to do. Actions appear in the card's menu
or in its summary area, and the available choices change with the journal type and your access.

If you need to…	Use the journal card that offers…
Review bank statements or cash activity	**Statements** or **Cash Registers**
Record a payment or move money between journals	**Payments**, **Customer Payment**, **Vendor Payment**, or **Internal Transfer**
Create or review sales documents	**Invoices**, **Credit Notes**, **Invoice**, or **Invoices Analysis**
Create or review purchase documents	**Bills**, **Refund**, **Bill**, or **Bills Analysis**
Review general journal work	**Journal Entries**, **Entries to Review**, or **Journal Items**
Create a general journal record	**Journal Entry** or **New Entry**
Post available general-journal entries	**Post All Entries**
Change the journal's dashboard setup	**Configuration**

Prerequisites

- You have reached a journal card.
- You know whether the work belongs to a bank, cash, sale, purchase, general, or situation journal.

Steps

1. Identify the journal type from the card's available entry points.
2. Open the card menu.
3. Select the entry point that matches your work from the table above.

4. Continue the task on the destination page.

Result: The selected journal entry point opens its corresponding accounting work surface.

Handle journal and access branches

The journal type is the first branch to check because it determines which group of actions belongs
on the card. Statement-source settings, reconciliation counts, dashboard counts, and access groups
then refine what you can see.

What you see or know	Use this branch
The journal is a bank journal	Use bank actions such as Statements and, where available, **Connect** or **New Transaction**
The journal is a cash journal	Use **Cash Registers** and the cash **New Transaction** action
The journal is a sale journal	Use sales invoice, credit-note, upload, and analysis actions
The journal is a purchase journal	Use bill, refund, manual creation, and analysis actions
The journal is a general or situation journal	Use journal-entry, review, journal-item, and posting actions
The bank statement source is not configured or uses online synchronization	**Connect** can appear for a bank journal
The bank statement source allows file import	**New Transaction** can appear for a bank journal
A cash journal has items to reconcile	**New Transaction** appears as a link rather than the primary button style
A dashboard count is greater than zero	Its related balance or action row appears
Your access includes the accounting user, invoice, or manager group	The corresponding new, posting, invoice, payment, transfer, or configuration actions can appear

Prerequisites

- You can see the journal card you need.
- You can read the card's journal type and the action labels currently available.

Steps

1. Read the journal type from the card's action choices.
2. Check whether the card offers the action you need.
3. Select the available action that matches the applicable branch.

Result: The card presents the entry point allowed by its journal data and your accounting access.

When the dashboard does not open as expected

Use the page title and visible controls to distinguish the Accounting Dashboard from another page.
The dashboard's empty state also gives a direct next action when no journal cards are available.

What you see	What to do
The route lands on `/web` and the page shows **Menu Style**, **Font Type**, **Preloader Option**, **Theme Colors**, **Brand Color**, **Background Color**, **Sidebar Color**, or **Chatter Position**	You are on the theme customizer. Return to **Accounting** > **Dashboard** and check for the journal cards.
The dashboard has no journal cards	Read `This is the accounting dashboard`, then follow `If you have not installed a chart of account, please install one first.`
The empty state offers a country-selection link	Select `Browse available countries.` to continue the chart-of-accounts setup route.
A sequence-gap link appears on a card	Read `Gaps due to canceled invoices, deleted entries or manual errors in open period.` before choosing the next journal action.

The buttons **Save** and **Reset To Default** belong to the theme customizer, not to the Accounting
Dashboard. Values such as `5`, `48`, `My Company (San Francisco)`, and `Mitchell Admindemo` are
record values or saved settings rather than dashboard labels.

Know what to open next

Choose the follow-on page that owns the work opened from the journal card.

After choosing…	Continue with…
Statements, **Cash Registers**, **Journal Entries**, or **Journal Items**	Accounting journals and bank activity
Invoices, **Bills**, **Credit Notes**, **Refund**, **Invoice**, or **Bill**	Customers, products, and invoices
Payments, **Customer Payment**, **Vendor Payment**, or **Internal Transfer**	Payments and follow-ups
Invoices Analysis or **Bills Analysis**	Reports and audit work

The dashboard is part of the shared application shell. For shell navigation, use Understanding the interface and Navigation basics.