

# Basic terminology

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## Basic terminology

### Accounting Dashboard terms

The Accounting Dashboard is the screen where accounting journal cards present the work available for each journal type.

**Customer** identifies customer work, and **Invoices** identifies invoice work.

| If you need to...                         | Go to                                                                                                      |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------|
| Understand the Accounting Dashboard terms | <a href="#">Accounting Dashboard terms</a>                                                                 |
| Prepare to open the screen                | <a href="#">Before you start</a>                                                                           |
| Open the screen and recognize it          | <a href="#">Open and recognize the Dashboard</a>                                                           |
| Choose work from a journal card           | <a href="#">Choose a journal action</a>                                                                    |
| Resolve a Dashboard mismatch              | <a href="#">When the Dashboard does not match</a>                                                          |
| Continue journal or invoice work          | <a href="#">Accounting journals and bank activity</a> or <a href="#">Customers, products, and invoices</a> |

### Before you start

The Dashboard for these terms is reached from **Accounting**.

The destination is labeled **Dashboard** under **Accounting**.

#### Prerequisites

- You can open **Accounting**.

### Open and recognize the Dashboard

Use this procedure to reach the Dashboard from the application menu and identify the landing screen.

## Steps

1. Open **Accounting**.
2. Select **Dashboard**.
3. Confirm that the **Accounting Dashboard** heading is visible.

**Result:** The **Dashboard** is open, with the **Accounting Periods**, **Bank Account**, **Taxes**, and **Chart of Accounts** cards available on the screen.

## Choose a journal action

A journal card presents actions and readouts together.

## Prerequisites

- The Dashboard is open.

## Steps

1. Select the action that matches the work you need to perform.

| If you need to...      | Select or read...                                                   |
|------------------------|---------------------------------------------------------------------|
| Create an invoice      | <b>New Invoice</b>                                                  |
| Upload or enter a bill | <b>Upload</b> or <b>Create Manually</b>                             |
| Connect an account     | <b>Connect</b>                                                      |
| Start a transaction    | <b>New Transaction</b>                                              |
| Create an entry        | <b>New Entry</b>                                                    |
| Review a sequence gap  | <b>Gaps in the sequence</b>                                         |
| Read account activity  | <b>Balance</b> , <b>Last Statement</b> , or <b>Misc. Operations</b> |

The Dashboard can also show **Gaps in the sequence**, **Balance**, **Last Statement**, and **Misc. Operations** for a journal card.

**Result:** The Dashboard shows the available action labels and readouts for the work on screen.

## When the Dashboard does not match

If the Dashboard does not open from a direct link, use the menu path instead.

1. Open **Accounting**.
2. Select **Dashboard**.

**Result:** The Dashboard is open after selecting **Dashboard** from **Accounting**.