

Understanding the interface

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What the interface is for

The application shell is the starting workspace for reaching the Accounting and Inventory areas. The **Accounting Dashboard** presents journal entries, while the **Inventory Dashboard** is an entry surface for Inventory work.

Choose a destination by task:

If you need to...	Go to
Recognize the shell and the two covered entry surfaces	Recognize the shell and entry screens
Open an Accounting or Inventory destination	Find an entry surface
Use an Inventory action	Use an Inventory entry action
Understand why Inventory areas differ	Handle role and data branches
Follow the detailed menu procedure	Navigation basics
Work with the Accounting Dashboard in detail	Accounting Dashboard
Work with the Inventory Overview in detail	Inventory Overview
Change workspace appearance	Personalizing your workspace

Before you start

Prerequisites

- Have permission to open the **Accounting Dashboard**.
- Know that Inventory can begin with a loading state while its information appears.
- Know that an account with no available Inventory role sees a no-views message instead of a role

area.

- The **Inventory Dashboard** is prioritized before the classic **Inventory Overview**.

An Inventory role is a work perspective that changes the areas and actions shown on the Inventory

surface. If no Inventory role is available, it shows

No inventory views are enabled for your role. Contact an administrator.

Find an entry surface

The product menu includes **Accounting** and **Inventory**. Choose the area that matches the work you need to start.

Open Accounting

Prerequisites

- You have permission to open the **Accounting Dashboard**.

Steps

1. Select the destination that matches your work.

If you need to...	Select in order
Open the Accounting entry surface	Accounting , then Dashboard

The requested Accounting screen did not open when this route was used. The product menu also did

not open for the Accounting menu action, so stop at the screen that remains visible.

Result: The Accounting Dashboard is the destination for journal entry work when the screen opens.

Open Inventory

Steps

1. Select the destination that matches your work.

If you need to...	Select in order
Open the Inventory entry surface	Inventory , then Inventory Dashboard

The Inventory menu did not open when this route was used.

Result: The Inventory Dashboard is the destination for the Inventory entry surface when the screen opens.

Recognize the shell and entry screens

The shell combines product navigation with workspace controls. The Accounting Dashboard presents journal entries with a journal name and type. The Inventory surface presents a role title and subtitle, followed by metrics and lists that change with the selected role.

The shell currently shows these workspace controls:

Control	Type
Menu Style	Select
Font Type	Select
Preloader Option	Select
Theme Colors	Select
Brand Color	Select
Background Color	Select
Sidebar Color	Select
Chatter Position	Select
Save	Button
Reset To Default	Button

When these role choices are available, the Inventory surface shows the area for the selected choice:

Role choice	Main area
Warehouse manager	Today at a glance, including stock health, transfers, activity, and attention areas.
Buyer / planner	Reorder queue, vendor performance, and open purchase-order timing.
Ops director	Flow today, throughput, work-in-progress, and exception triage.

Role choice	Main area
CFO / finance	Working capital, inventory ageing, and warehouse valuation.

Inventory empty states use these messages:

Area	Message
Items below minimum	No items below the minimum.
Activity	No recent activity.
Vendor activity	No vendor activity in the last 90 days.
Purchase orders	No open purchase orders.
Work in progress	No work in progress.
Exceptions	No open exceptions.
Aged stock	No aged stock – all inventory is fresh.

Use an Inventory entry action

These actions take you from the Inventory surface to the next operational area. When you recognize the area you need, continue with the action procedure.

Open the next Inventory work area

Prerequisites

- The Inventory surface is open.
- The relevant action is visible in the role area you selected.

Steps

1. Select the action that matches your next task.

If you need to...	Select
Start a transfer	New transfer
Review replenishment or incoming transfers ready for validation	Review →
Move to purchasing work for a stock risk	Reorder →
Resolve an open backorder	Resolve →
Start a purchase order	Draft PO

If you need to...	Select
Open the related picking	Open →

Result: The selected action takes you to a new transfer form, replenishment or receipts for validation, the buyer role, backorders, a purchase-order form, or the related picking.

Handle role and data branches

Choose a visible Inventory role

Prerequisites

- The Inventory surface is open.
- At least one role choice is visible.

Steps

1. Select the visible role choice that matches your work after the Inventory information appears.

If you need to work with...	Select
Stock health, transfers, and attention areas	Warehouse manager
Reordering, vendors, and purchase-order timing	Buyer / planner
Throughput, work-in-progress, and exceptions	Ops director
Working capital, ageing, and valuation	CFO / finance

Result: The selected role area appears.

What you see	What appears
Loading state	The Inventory area is still loading.
No available role choice	No inventory views are enabled for your role. Contact an administrator.
More than one role choice	A role selector can open.
Warehouse manager selected	The manager area appears.
Buyer / planner selected	The buyer area appears.
Ops director selected	The operations area appears.

What you see	What appears
CFO / finance selected	The finance area appears.

When the screen does not open

Note: The requested Accounting screen did not open, and the Accounting and Inventory menu actions did not open.

Try the destination again

Prerequisites

- The product menu is visible.

Steps

1. Select the destination that matches your work.

If you need to...	Select in order
Open Accounting	Accounting , then Dashboard
Open Inventory	Inventory , then Inventory Dashboard

2. If the requested screen still does not open, stop at the screen that remains visible.

Result: The requested destination is open when the selection succeeds; otherwise, the requested screen remains unopened.

Use these recovery actions when the destination does not open:

What you see	What to do
The requested screen does not open	Remain on the screen that is visible and use Getting help .
The Accounting menu does not open	Use Navigation basics for the menu procedure.
The Inventory menu does not open	Use Navigation basics for the menu procedure.

Continue with the task you need

The two surfaces on this page are entry points rather than complete Accounting or Inventory

procedures. Continue with the page that owns the work:

If you need to...	Continue with...
Open covered destinations from the product menu	Navigation basics
Understand the Accounting Dashboard and its journal entry points	Accounting Dashboard
Understand the Inventory Overview hub	Inventory Overview
Change workspace appearance	Personalizing your workspace

Result: You know which page owns the next navigation, Accounting, Inventory, or personalization task.