

Configuration dashboard

September 11, 2026

Configuration dashboard

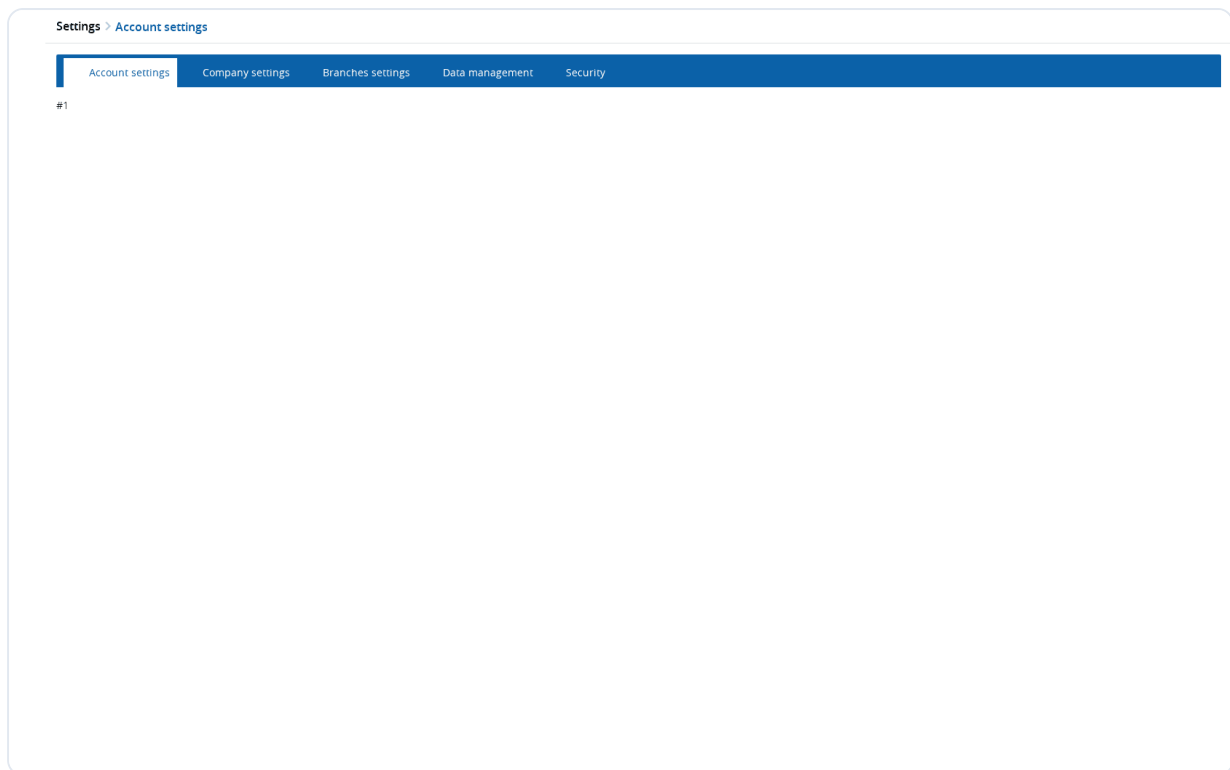
Configuration dashboard

The Configuration dashboard is the entry surface for choosing a settings area. It presents

five areas for account, company, branch, data, and security settings.

If you need to...	Go to
Open the settings entry surface	Open the configuration dashboard
Understand what is on the screen	Read the dashboard
Choose an area to continue	Select a settings area
Check whether this surface maintains records	Understand the dashboard's limits

The dashboard route is `/configuration/home` .



Before you start

You do not enter form data on the dashboard before choosing a settings area. The screen has no form fields.

Have the settings area you need in mind so you can choose it after the screen loads.

Open the configuration dashboard

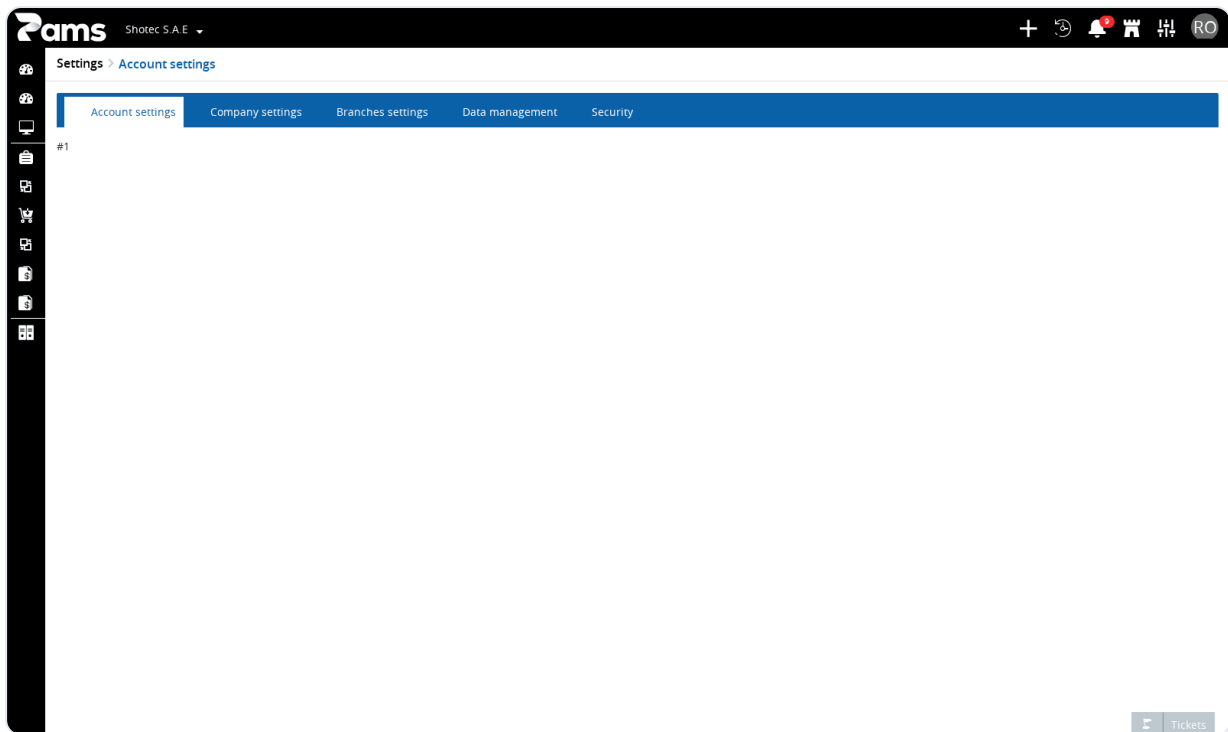
Use this procedure to reach the dashboard and recognize its starting area.

Prerequisites

- You know the route `/configuration/home` .

Steps

1. Open `/configuration/home` .
2. Check that **Account settings** is the selected area.



Result: The dashboard is open at `/configuration/home` with **Account settings** selected and the `#1` content marker visible.

Review each settings area and its content marker before choosing one.

Read the dashboard

Each settings area is a choice for continuing to a different kind of configuration work. The dashboard itself shows the choices and the content marker for the selected choice.

Settings area	What appears when selected
Account settings	#1
Company settings	#2
Branches settings	#3
Data management	#4
Security	#5

Only the selected area's content marker appears. The dashboard has no form fields and no grid columns. It also has no page-specific validation, confirmation, success, or error

messages.

The five areas are the controls available on this surface.

The content under each area is limited to its marker on this screen. Choose an area when you are ready to continue.

Select a settings area

Select one settings area to identify the configuration work you want to continue with.

Prerequisites

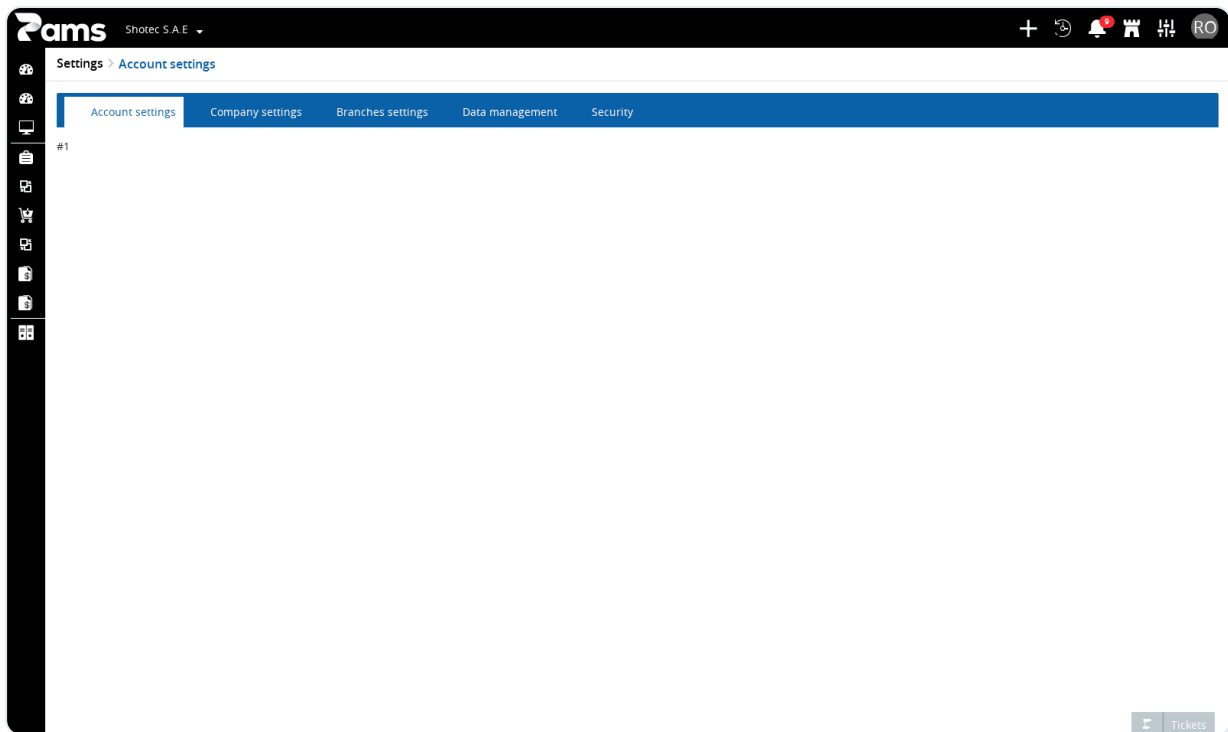
- The dashboard is open.

Steps

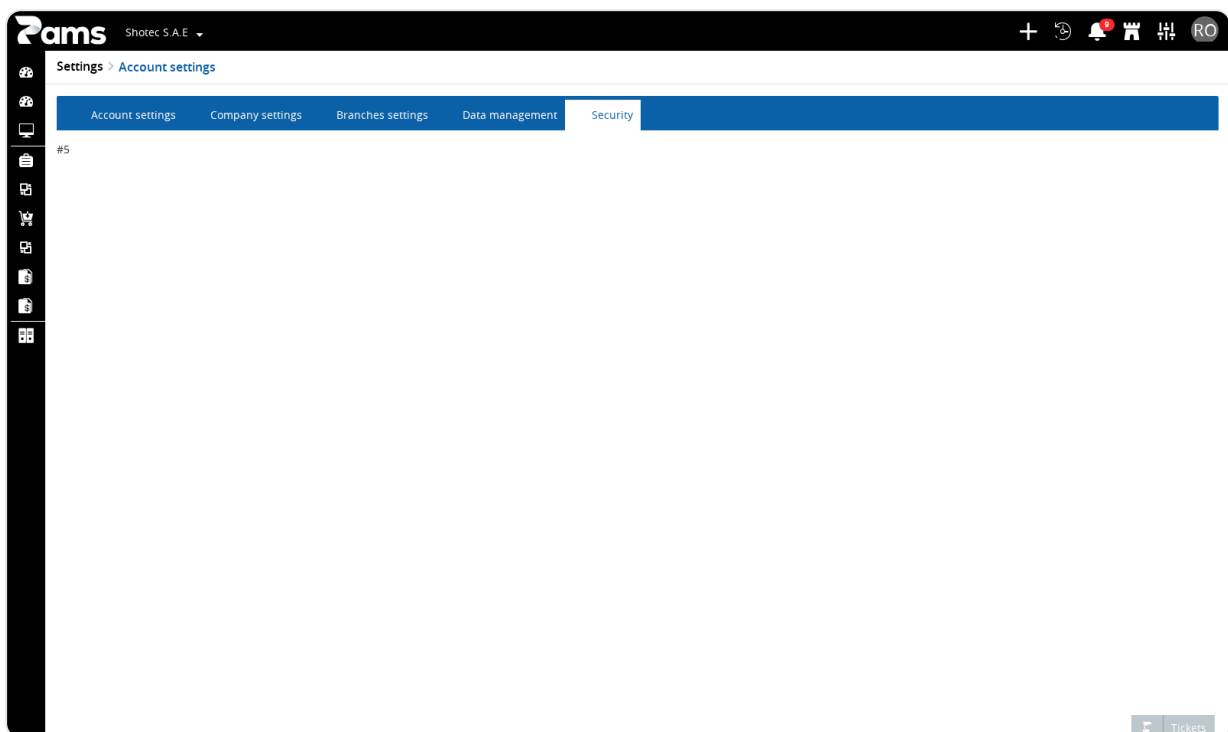
1. Select the area that matches what you need to do.

If you need to...	Select	The screen shows
Work with account settings	Account settings	#1
Work with company settings	Company settings	#2
Work with branch settings	Branches settings	#3
Work with data management settings	Data management	#4
Work with security settings	Security	#5

2. Check the content marker for the area you selected.



Use the security image to inspect the content marker after selecting a different settings area.



Result: The selected area remains on `/configuration/home` , and its corresponding content marker is visible.

Use the selected area as the starting point for the configuration work you need to do.

Understand the dashboard's limits

Use this dashboard to choose a settings area, not to maintain records. Do not look here for controls that create, update, delete, export, or confirm a record.

What you need to do	Where to act
Choose a configuration area	Use one of the five settings controls on this dashboard.
Maintain configuration records	Continue from the selected area to its detailed settings surface.
Respond to a validation or confirmation message	No page-specific message is provided on this dashboard.

Record maintenance belongs to the detailed settings surface that follows the selection.