

Getting Started with Configuration

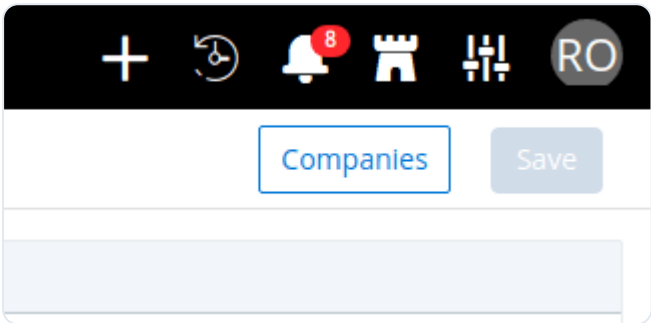
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Applications > Configuration



Configuration record (with data)



Use Configuration to access company-related settings and save updates to a configuration record.

What You Can Do Here

- **Companies** opens company-related configuration.
- **Save** saves changes made to the configuration record.
- **Tickets** opens related tickets.
- **Attach** adds an attachment to the record.
- **Ok** confirms the current action.
- **Dashboard** opens the Dashboard.
- **Reports** opens reporting options.
- **My Desk** opens your personal workspace.
- **Sales** opens the Sales area.
- **PM** opens the project management area.
- **Purchasing** opens the Purchasing area.
- **Warehouse** opens the Warehouse area.

First Session: Review and Save Company Configuration

1. In **Applications**, select **Configuration**.
2. Open the configuration record you need to review.
3. Select **Companies** to open the company-related configuration.
4. Review or update the available settings as required.
5. Select **Save**.

What Success Looks Like

The configuration record remains available with your saved company configuration changes.

Next Steps

- Select **Sales** to continue with sales operations.
- Select **PM** to work with project management activities.
- Select **Purchasing** or **Warehouse** to continue with purchasing and inventory operations.
- Select **Dashboard**, **Reports**, or **My Desk** to review operational information and your work.

Related pages

- [Configuration — Overview](#)
- [Dashboard Settings](#)
- [Configuration — Learning Path](#)
- [Departments](#)
- **Item Categories**
- **Reactivationreasons**
- [Default Layouts](#)
- [Features](#)
- [Home](#)
- [Plans](#)
- [Reports Settings](#)
- **Serial Combinations**
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