

Home

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Home

Applications > Configuration



Home

Overview

Home is the central starting point for accessing operational areas of the platform. Use it to move to dashboards, reports, your work desk, and application areas such as Sales, PM, Purchasing, Warehouse, and Finance. You can also attach a file from Home when you need to add supporting material.

Workflow

1. Choose the area in which you need to work.

Select **Dashboard** for dashboard information, **Reports** for reporting, or **My Desk** for your personal work area. Select **Sales**, **PM**, **Purchasing**, **Warehouse**, or **Finance** to open the relevant business application. Use **Tasks**, **Activities**, or **Data** when those are the required operational areas.

2. Decide whether you need to access tickets.

Select **Tickets** to open the ticket area. Return to Home or select another application area when your next activity belongs to a different function.

3. Decide whether a supporting file must be added.

To add a file, select **Attach**. You can also place the file in the **or Drop a file here** area.

Tip: Use a file attachment to keep relevant supporting material available with your Home activity.

4. Confirm the action.

Select **Ok** after attaching the file or completing the required Home action.

Examples

A sales representative needs to review sales work and attach a customer document.

1. From Home, select **Sales** to enter the sales application.
2. When the representative needs to add the customer document, return to the Home attachment area and select **Attach**.
3. Add the file, or place it in **or Drop a file here**.
4. Select **Ok** to confirm the attachment.
5. Select **My Desk** to continue with assigned work, or select **Tasks** or **Activities** to manage the next required action.

Tips

Note: Select the application area that matches the business process you are performing, such as **Purchasing** for purchasing work or **Warehouse** for warehouse operations.

Tip: Use **Reports** when you need reporting information instead of opening an operational application area.

Tip: Select **Ok** after adding a file to complete the action.

Troubleshooting

Symptom	Likely cause	Fix
You cannot find the required business area.	The relevant application area has not been selected.	Select the appropriate Home control, such as Finance , PM , Purchasing , or Warehouse .
A file has not been added.	The attachment action has not been started or confirmed.	Select Attach or use or Drop a file here , then select Ok .
You need to work with tickets rather than operational records.	You are still on the general Home area.	Select Tickets .

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