Configuration — Overview

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Overview

Configuration provides the central settings used to represent and operate the business in the platform. Sales representatives, purchasing officers, warehouse managers, project managers, and finance officers may use these settings as part of their day-to-day work, while sales managers maintain the organisation-level information.

This area manages company identity and administrative details, including the Full Name, Managing Director, Company Registration No., VAT ID Number, and Statement. It also includes branch-related configuration.

Configuration also provides access to the Configuration Dashboard, where Widgets and Tabs can be used to organise configuration information.

What you can do here

- Use **Branches** to access branch-related configuration.
- Enter or update the organisation's **Full Name**.
- Maintain the company **Statement**.
- Record the **Managing Director**.
- Maintain the **Company Registration No.** and **VAT ID Number**.
- Open the **Configuration Dashboard** and work with a **Widget** or **Tab**.
- Select **Save** to retain changes, or **Save and Close** to retain changes and exit the Configuration record.

Related pages

- Getting Started with Configuration
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- Manage Demo Data
- Reports settings
- Serial Combinations
- Serial Combinations
- Shareable Content
- Templates
- Warehouse
- Product Stage
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- Default Layouts