The dashboard

TL;DR

> This page describes the dashboard, area by area, and explains why its figures differ from the reports. The one thing to know first: when the dashboard opens, its date box shows a range that has not been applied, and every figure covers all time until you press Apply.

What the dashboard is for

The dashboard is the first screen after signing in. It gives a one-glance summary of the whole system: master data counts, order progress, invoice totals, and the latest activity. It answers "how are things going". For exact figures to act on, use the reports.

The screen, area by area

From top to bottom:

1. **The toolbar**: the heading "Dashboard", a company picker ("Select Company", several allowed at once), a date box, and the buttons "Apply" and "Reset Filter". Nothing changes until "Apply" is pressed.
2. **Three coloured cards, "Companies", "Customers" and "Products"**: each with the tiles "Total", "Active", "Deactive", "Deleted". They count what exists: everything, the switched-on ones, the switched-off ones, and the removed ones.
3. "Purchase Order Summary": "Total Purchase Orders", then five tiles pairing a status with a plain-words line: "Complete" ("Fully Packed"), "Pending" ("Awaiting Invoice Creation"), "Partially Dispatch" ("Partially Packed"), "In Progress" ("Invoice Generated"), "Deleted" ("PO Revised/Deleted").
4. "Top 5 Companies by Currency": a column chart, subtitle "Ranked by final amount", with a currency picker. It totals the final amounts of completed invoices.
5. "Status Overview": a card that slides between three charts every few seconds: Invoices ("InProgress" / "Complete" / "Delivered" / "Deleted"), Packaging ("Draft" / "Complete" / "Deleted"), Pallets (the same three as Packaging). The Invoices chart carries **four** figures

where the other two carry three, and its total counts all four. **"Complete" counts only invoices not yet marked as delivered**, so marking a delivery moves one figure into "Delivered" and leaves the total alone.

6. "Top 5 Customers": a bar chart, subtitle "Based on completed invoices", counting completed invoices per customer, with a "View All" button.
7. "Invoices by Country": a world map, subtitle "Completed invoices worldwide", counting completed invoices by the customer's country.
8. **Recent activity**: tabs "Invoice", "Packaging", "Pallet", each showing the five most recently entered ("5 Most Recent Invoices" and so on), with a "View All" button.

Which areas you see depends on your access. Hidden cards vanish entirely and their neighbours spread out. A reader with very little access sees only the toolbar.

> **IMAGE PLACEHOLDER: the-dashboard-layout-01** · annotated screenshot · status: pending
>
> **Shows:** the dashboard layout with each area labelled in reading order
>
> **Must include:** the toolbar with company picker, date box, Apply and Reset Filter; the three stat cards; the Purchase Order Summary; the two Top 5 charts; the Status Overview slider; the country map; the tabbed recent-activity table, each with a number matching the list on this page
>
> **Must not show:** real company, customer, or figure values; code or file names
>
> **Alt text (draft):** The dashboard screen with eight numbered labels: the filter toolbar across the top, three coloured count cards, the Purchase Order Summary card, the Top 5 Companies by Currency chart, the sliding Status Overview, the Top 5 Customers chart, the Invoices by Country map, and the recent-activity table with its three tabs.

The date box does not mean what it shows

Read this before trusting any figure.

When the dashboard opens, every figure covers **all time**. No date range is applied. The date box, however, fills itself in with a range covering roughly the last month, a range that has **not** been applied. The label and the figures disagree from the very first moment.

Dates take effect only when you open the box, choose a range, and press "Apply". Choosing a range without pressing "Apply" changes the label again, and nothing else.

One more thing the label does not say: the range works on **when things were entered into the system**, not on invoice dates or order dates. The reports work on the business dates. This alone makes date-filtered comparisons drift. See the last section.

The company filter

The company picker narrows every figure to the chosen companies, except one area. **The "Products" card never changes**, whichever companies are picked, because products are shared across all companies. The card counts every product in the system, always.

Picking no company at all shows everything you are allowed to see.

Two people will see two different dashboards

Figures reflect **only the companies assigned to you**. An administrator with full access sees every company's data with no restriction. So an administrator and another user comparing screens will not match, and neither screen is wrong.

Nothing on the screen says this. If two people disagree about a number, first ask which companies each of them can see.

What can be clicked, and what cannot

Clickable:

- The "Companies", "Customers" and "Products" cards: the whole card opens the matching list screen, unfiltered. Clicking "Deactive: 3" does not open a list of the three; it opens the full list.
- The "View All" buttons and each row of the recent-activity table.
- The recent-activity **tabs** and the currency picker on the chart: these switch the display without reloading.

Not clickable, by design:

- The entire "Purchase Order Summary" card. There is no path from the dashboard to the order list.
- Chart bars, donut slices, and map countries: no drill-down anywhere.

One caution: the "View All" button beside "Top 5 Customers" opens the customer list, which not everyone who can see the chart is allowed to open. Some readers will get an access error page there.

When there is nothing to show

Each area has its own wording. Both Top 5 charts show "No completed invoices data available". The map shows "No completed invoices by country". The activity tabs show "No recent invoices found.", "No recent packaging lists found." or "No recent pallets found.". The status charts show a grey "No Data" ring. All of these are normal on a new or narrowly filtered system.

If a chart area is blank, with no message at all, the page loaded faster than its chart library. Reload the page.

Nothing refreshes on its own

The dashboard is a snapshot taken when the page loaded. Numbers do not update while you watch; the "Status Overview" slider rotates its display, but its figures are as old as the page. Reload, or press "Apply", to refresh.

Why these numbers may not match the reports

The dashboard and the reports count differently. None of the following means a number is wrong. They mean the two screens are answering slightly different questions. To compare like with like:

1. **Dates mean different things.** The dashboard's range works on entry dates; every report works on invoice or order dates. Compare with no date filter on either side, or expect drift.
2. **"Total Purchase Orders" counts removed and revised orders.** Every order report leaves them out. Wherever orders have been revised, the dashboard total will exceed any report count, reliably.

3. **"Deleted" changes meaning between cards.** On the order card it counts orders whose status is Delete. On the invoice, packaging and pallet charts it counts rows actually removed from the lists. Same word, two measures, and an order removed outright is counted in neither place.
4. **The charts follow the customer and company; the invoice list does not.** Top 5 Companies by Currency and Top 5 Customers group by the customer or company itself and show its current name, so renaming one keeps a single bar carrying the new name. The invoice **list** still shows each invoice's own frozen copy of the name, which is why searching the list by a new name does not find invoices raised before the rename. See Finding invoices.
5. **The "Products" card is global.** The Item Dashboard offers only products that appear on orders in your companies. Different populations, so do not expect the counts to relate.
6. The currency chart **quietly skips** invoices with no customer currency. Shipment Detail includes them. Summing that report's "Final Amount" column can exceed the chart.
7. The dashboard counts **orders**; two reports count **order lines**. Pending Order Items and the Item Dashboard show one row per line, and a line dispatched across several invoices appears several times. No dashboard order count is comparable to those row counts.

Two dashboard figures have no report to check them against at all: the "InProgress" invoice count (the invoice reports show completed invoices only), and the Packaging and Pallets charts (no report covers them).

FAQs

Why do the figures ignore the date range shown in the date box?

When the dashboard opens, the date box fills itself with a range that has not been applied, and every figure covers all time. Dates take effect only when you open the box, choose a range, and press Apply.

Why does the "Products" card never change when I pick companies?

Products are shared across all companies, so the card counts every product in the system whichever companies are picked. Every other area narrows to the chosen companies.

Why does a colleague's dashboard show different numbers from mine?

Figures reflect only the companies assigned to you, and an administrator with full access sees every company's data. Neither screen is wrong; first ask which companies each of you can see.

Why can't I click the Purchase Order Summary card or the chart bars?

They are not clickable by design. There is no path from the dashboard to the order list, and chart bars, donut slices and map countries have no drill-down anywhere.

Do the dashboard numbers update while I watch?

No. The dashboard is a snapshot taken when the page loaded; the Status Overview slider rotates its display, but its figures are as old as the page. Reload, or press Apply, to refresh.

Why don't the dashboard totals match the reports?

The two count differently: the dashboard's date range works on entry dates while reports use business dates, its order total includes removed and revised orders, and some figures have no report to check against at all. None of this means a number is wrong.

Related pages

- About the reports: the screens with the exact figures
- Finding your way around: the menu the dashboard sits in
- How access works: why two people see different dashboards
- Purchase order statuses: what the order summary's statuses mean

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