

The dashboard and workspaces

Getting started

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The dashboard and workspaces

Read your workspace charts, number cards and shortcuts, and move between modules.

Beginner · About 8 minutes · Version 1.0 · Updated 17 November 2026

Overview

Every module has a **workspace**, a home screen that shows how that part of the business is doing and gives one-click access to common tasks.

What a workspace shows



The Accounting workspace with a profit and loss chart, four number cards and a list of shortcuts.

- **Charts**, such as Profit and Loss for the fiscal year, showing income, expense and net profit.
- **Number cards**, such as Total Outgoing Bills, Total Incoming Bills, Total Incoming Payment and Total Outgoing Payment. Click a card to see the records behind the number.
- **Shortcuts**, links to the things you do most, such as Chart of Accounts, Sales Invoice, Purchase Invoice, Payment Entry, Journal Entry and General Ledger. A small number beside a shortcut shows how many records exist.
- **Reports and masters**, grouped lists of every report and setup page in the module.

Steps

1. Click a module name in the sidebar on the left, for example **Accounting**.
2. Read the charts and number cards at the top.
3. Click a shortcut to open that list, or click **Dashboard** to see more charts.
4. Click the module name again, or use the breadcrumb, to return.

Practical example

The owner opens **Accounting** every morning. The *Total Incoming Bills* card shows what customers owe. Clicking it opens the list of unpaid sales invoices, which she sorts by due date to decide who to call first.

Important notes

- Numbers on a workspace are only as current as the last refresh. Use the refresh icon on a chart to reload it.
- You can customise your own workspace (rearrange shortcuts and charts) if your role allows it.

Common mistakes

- Reading a chart for the wrong fiscal year. Check the date range on the chart before you rely on it.

Next steps

Read Updating your profile and password.

Related documentation

- Understanding the Hesabu ERP interface
- Running and saving reports