

System Overview

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About System Overview


System Overview is a Dashboard widget that provides various system information including stats, graphs, and recent users.

Tie-Ins*


Widgets	Nav Links	Client Cards	Automation Tasks	Email Templates	ACL Permissions	Search	Ev
DASHBOARD	NONE	NONE	NONE	NONE	NONE	NONE	

* Plugins are powerful and are not limited to the tie-ins listed above, these are just some of the most common

Installing System Overview

 The System Overview widget is installed by default for the primary staff user, but will need to be activated for additional staff as well as within any add-on companies.

To install the System Overview plugin, visit [Settings] > [Company] > [Plugins] > Available, and click the "Install" button for System Overview.

 System Overview (ver 1.5.2)
Author: Phillips Data, Inc.


Install

A message will be displayed, indicating that the plugin was successfully installed.

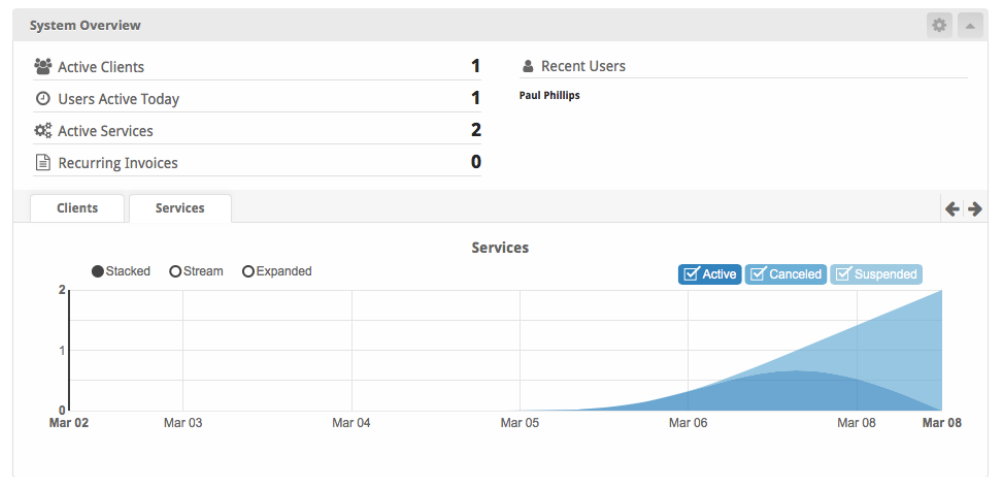
Next, visit [Home], and click the "Manage Widgets" link in the left column of the Dashboard. Drag the "System Overview" widget from the right column to the left column to add it to your Dashboard. This step will need to be repeated for each admin that wishes to have the widget appear on their Dashboard.

Manage Widgets

Drag widgets from the right to the left to add them to your dashboard, or from left to right to remove them.

 System Overview, ver 1.5.2
Author: Phillips Data, Inc.

The widget has now been added to your Dashboard and will look something like this:



Configuration

The System Overview widget may be configured on a per-staff basis, meaning that each staff member may customize it's appearance.

To configure the widget, click the cog/gear icon in the upper right window decorations. Modify the settings as desired, and click the "Update Settings" button when finished to save your changes and return to the Dashboard.

System Overview

Statistics

Check the options that will appear on the System Overview.

☒ Active Clients

☒ Users Active Today

☒ Active Services

☒ Recurring Invoices

☐ Pending Orders

☐ Open Tickets

Clients Tab

Check which graphs should appear on the Clients Tab.

☒ Clients Graph

Services Tab

Check which graphs should appear on the Services Tab.

☒ Services Graph

Settings

☐ Show Only One Tab

☒ Show Legend

Graph Date Range

7 Days

Return to Overview

Update Settings