Overview and Navigation

Documentation · https://viaspaces.com/Documentation/overview-and-navigation/

In this help doc: how to move around ViaSpaces — the interface layout, quick actions, notifications, the Home screen, the Dashboard, and filters.

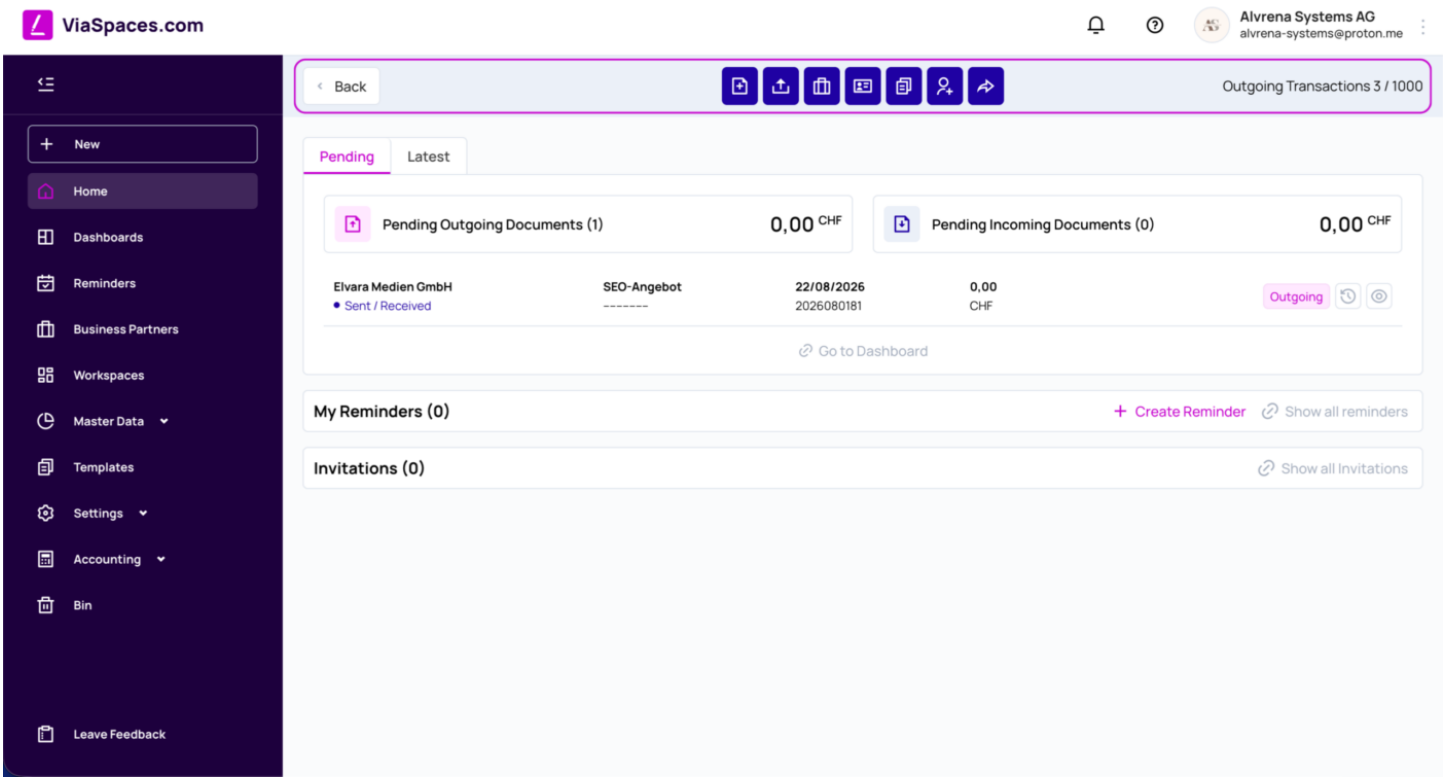
The interface is the same across the account: a sidebar on the left, a header on top, and the working area in the middle. This page explains where things are and how to find documents fast.

Interface Layout

The **header** runs across the top and holds the notifications bell, the help button, the account name with the user menu, and an **Outgoing Transactions** counter showing how many of the plan's transactions are used — a quick way to see how much of the plan is left before more transactions are billed.

The **sidebar** on the left lists the main areas: Home, Dashboards, Reminders, Business Partners, Workspaces, Master Data, Templates, Settings, Accounting, and Bin, with **New** at the top and **Leave Feedback** at the bottom. The collapse control narrows the sidebar to icons, which frees up screen width when working on a wide document.

A row of **quick-action icons** sits at the top of the working area for the tasks used most often, so common actions are one click away from any screen.



Quick Actions

The quick-action icons open the common tasks directly, without going through the menus:

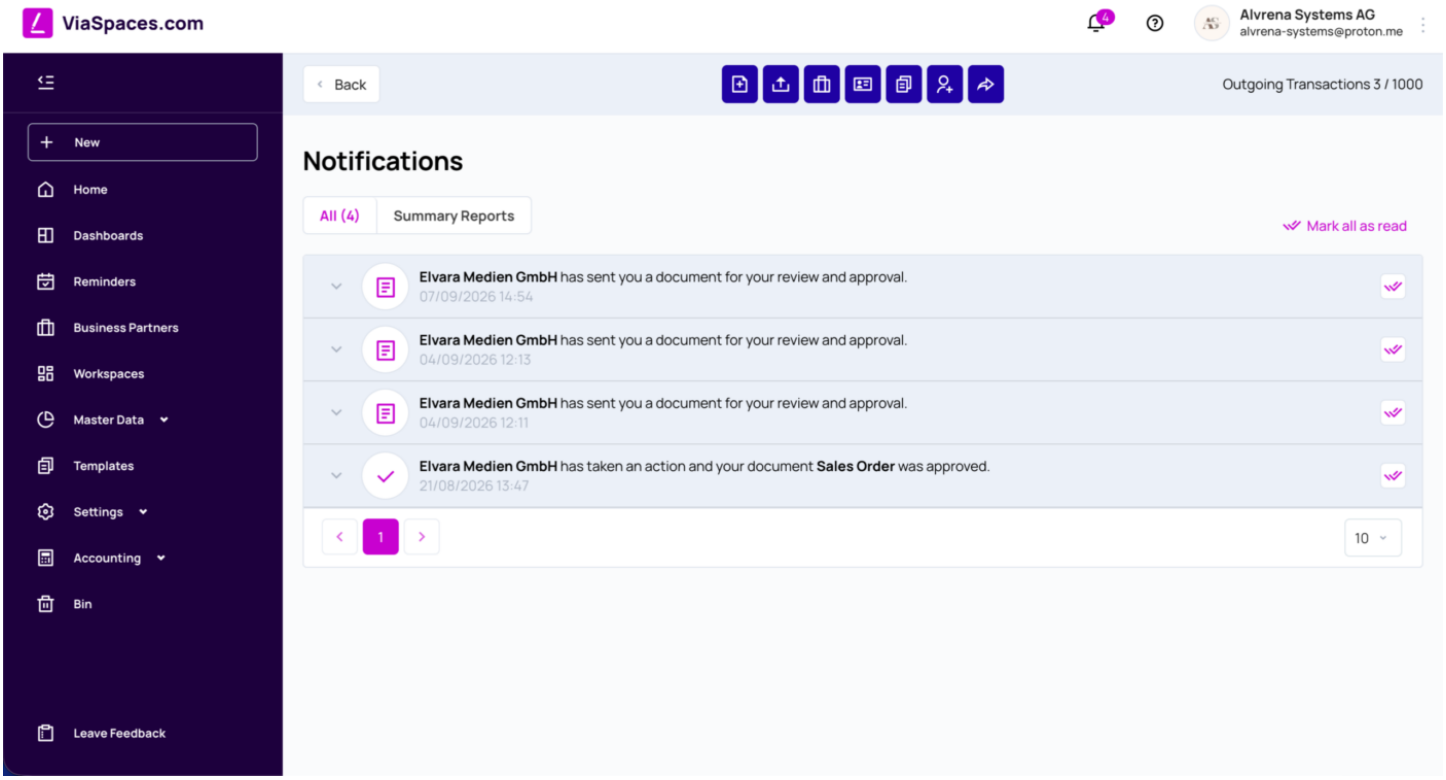
- **New Document** — opens Create New Document to start a document from a template.
- **Upload Document** — opens Upload Document to import external files.
- **Add Business Partner** — opens the dialog to add a partner.
- **Send Business Card** — opens the invitation to connect with a partner.
- **Templates** — opens the Templates page.
- **Add New User** — opens the user invitation.
- **Share registration link** — shares a ViaSpaces registration link, handy for inviting a partner who is not yet on the platform.

Switching Accounts

The user menu in the top-right corner returns to **My Accounts**, where another account is selected without signing out. This is the way to move between accounts during the day — for example, from a company account to a personal one — while each keeps its own data, documents, and settings.

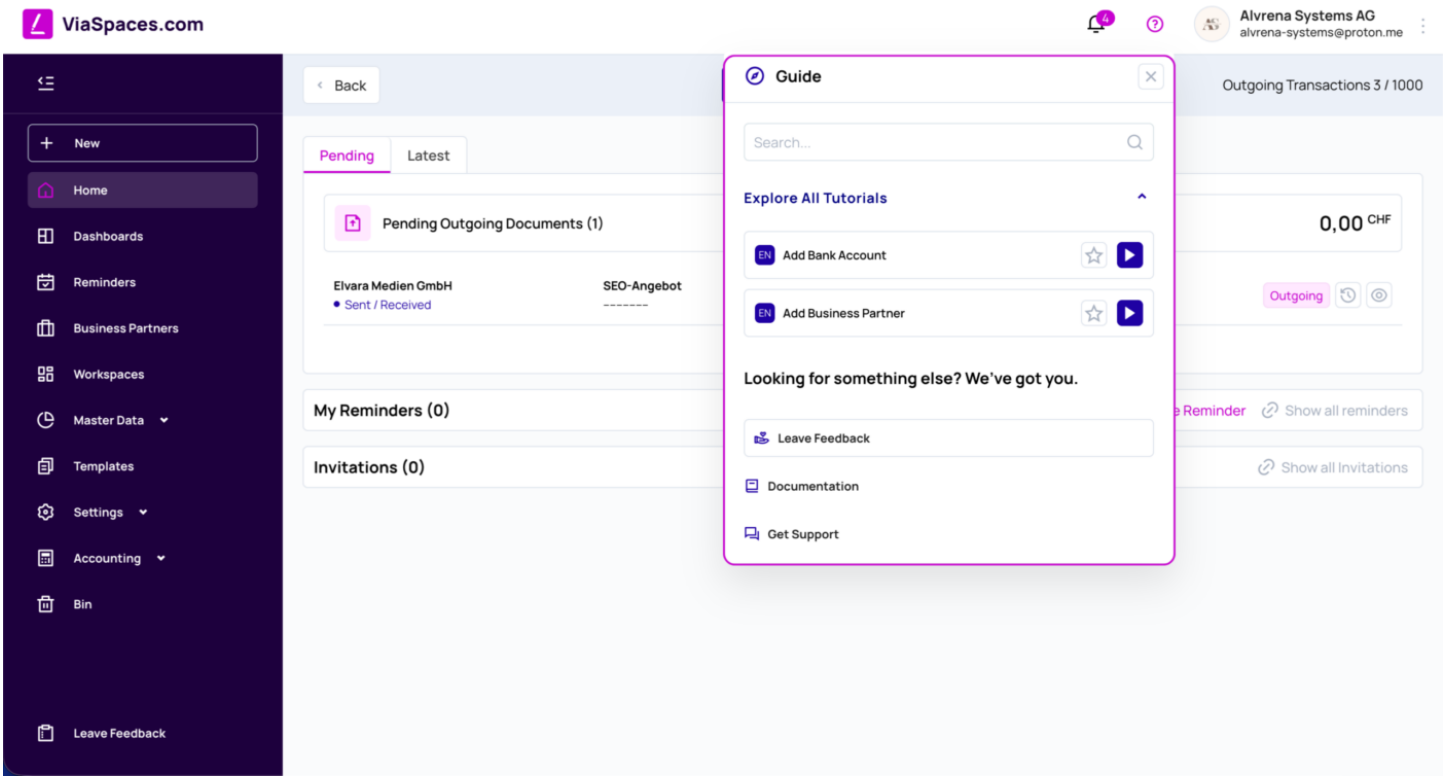
Notifications

The bell in the header opens **Notifications**, with a count of unread items, so nothing waiting for action is missed. Notifications are split into two tabs: **All** and **Summary Reports** (periodic summaries, such as a weekly report). Each notification shows the sender, the event — for example, a document sent for review or an action taken on a document — and a timestamp. **Mark all as read** clears the unread state after catching up. Which events produce a notification, and on which channel, is set in **Settings**, Notifications.



Help and Guide

The help button opens the **Guide**, the place to look when a task is unfamiliar. It holds a search, **Explore All Tutorials** with short walkthroughs (for example, Add Bank Account, Add Business Partner), and links to **Leave Feedback**, **Documentation**, and **Get Support**. A tutorial can run as a step-by-step tour that points to the controls on screen, guiding a new user through a task the first time.



Home Screen

Home is the starting point after opening an account — it surfaces what needs attention now. It shows **Pending Outgoing Documents** and **Pending Incoming Documents** with their counts and totals,

My Reminders, and **Invitations**. **Go to Dashboard** opens the full document view when more than the day's pending work is needed.

Dashboard

The Dashboard, opened from **Dashboards**, holds every document in the account with counters, charts, and the document list. It is the main place to track document flow and find a specific document.

The controls above the Dashboard are **Workspace** (limits the view to a workspace, so a team sees only its own documents), **Filter**, **Saved Filters**, **Reset Filter**, and a chart toggle.

Counters. The **Outgoing Documents** and **Incoming Documents** widgets count documents by state — **Sent**, **Accepted**, and **Pending** — with each state's total value, giving an at-a-glance picture of what is agreed and what is still waiting. Values are shown in the account's default currency set in **Settings**, and amounts in other currencies are converted to it, so a mixed-currency account still totals in one figure. The currency selector changes the display currency.

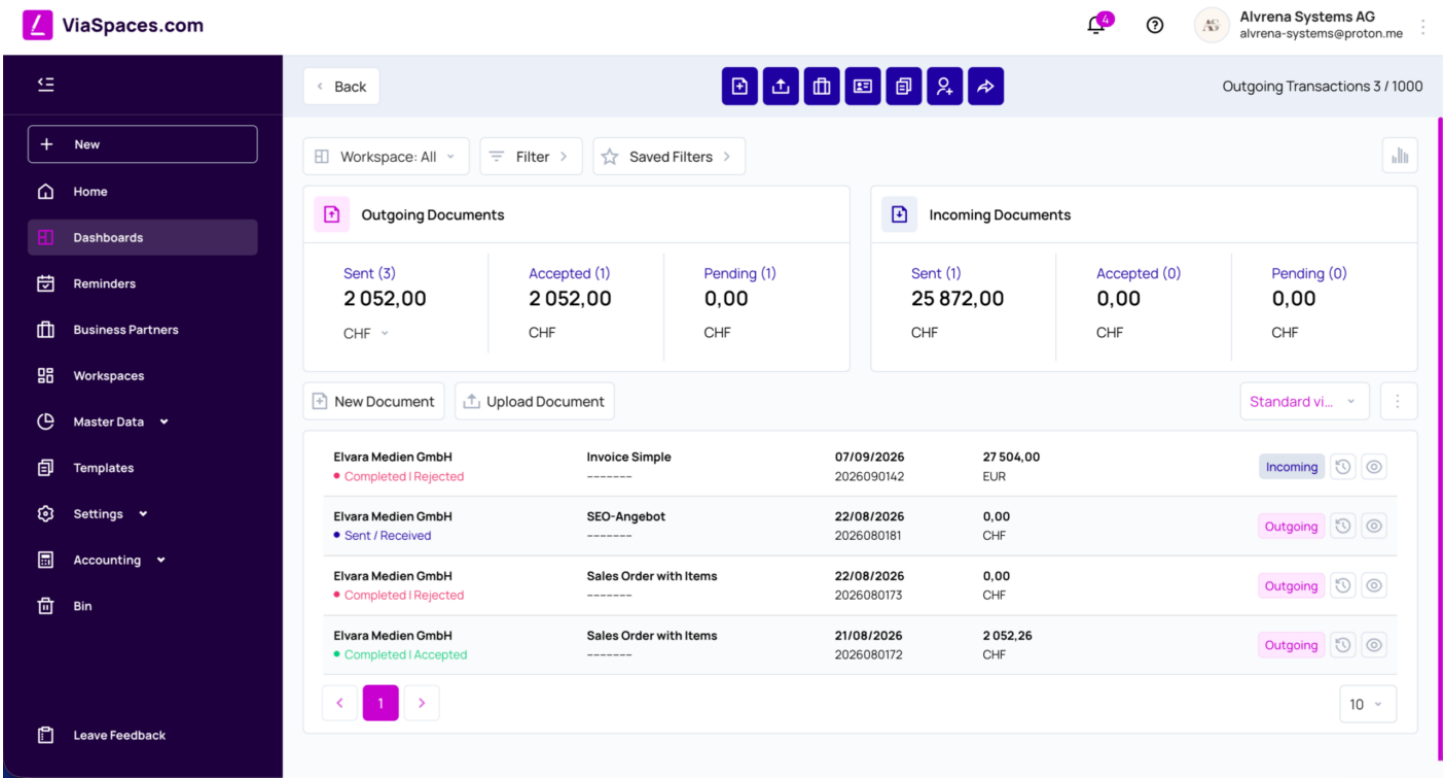
Payment widgets summarize documents by payment state — **Paid**, **Unpaid**, and **Partially Paid** — for outgoing (Billing & Invoicing) and incoming (Report center), useful for seeing what is still owed. Payment state is managed on the Payments status management page.

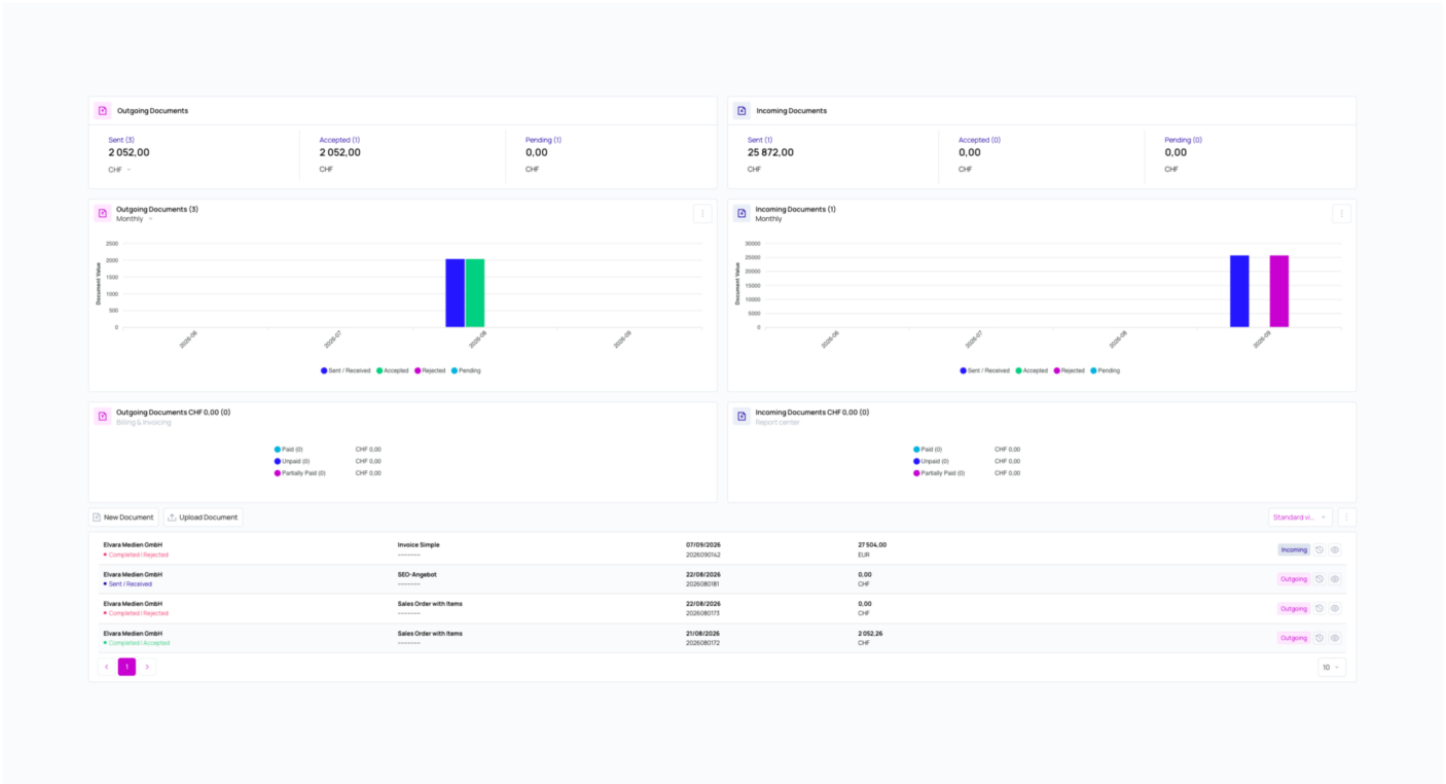
Charts. The Outgoing and Incoming charts plot document value over time, with a legend for Sent / Received, Accepted, Rejected, and Pending — a quick read on trend across months. A period selector changes the grouping (for example, Monthly). The chart menu offers **Copy PNG to Clipboard** and **Download PNG**, for dropping a chart into a report or a message.

Document list. Each row shows the status, partner, subtype, date and document number, value and currency, and direction (Incoming or Outgoing), with **History** and **Preview** actions. **New Document** and **Upload Document** start a document from here.

Views. The view selector switches the list between **Standard view**, **Post-processing view** (payment columns and actions), and **Validity view** (validity dates) — pick the one that matches the task, such as chasing payments or checking expirations. The post-processing and validity views are

covered on the Payments status management and Managing validity and expirations pages.





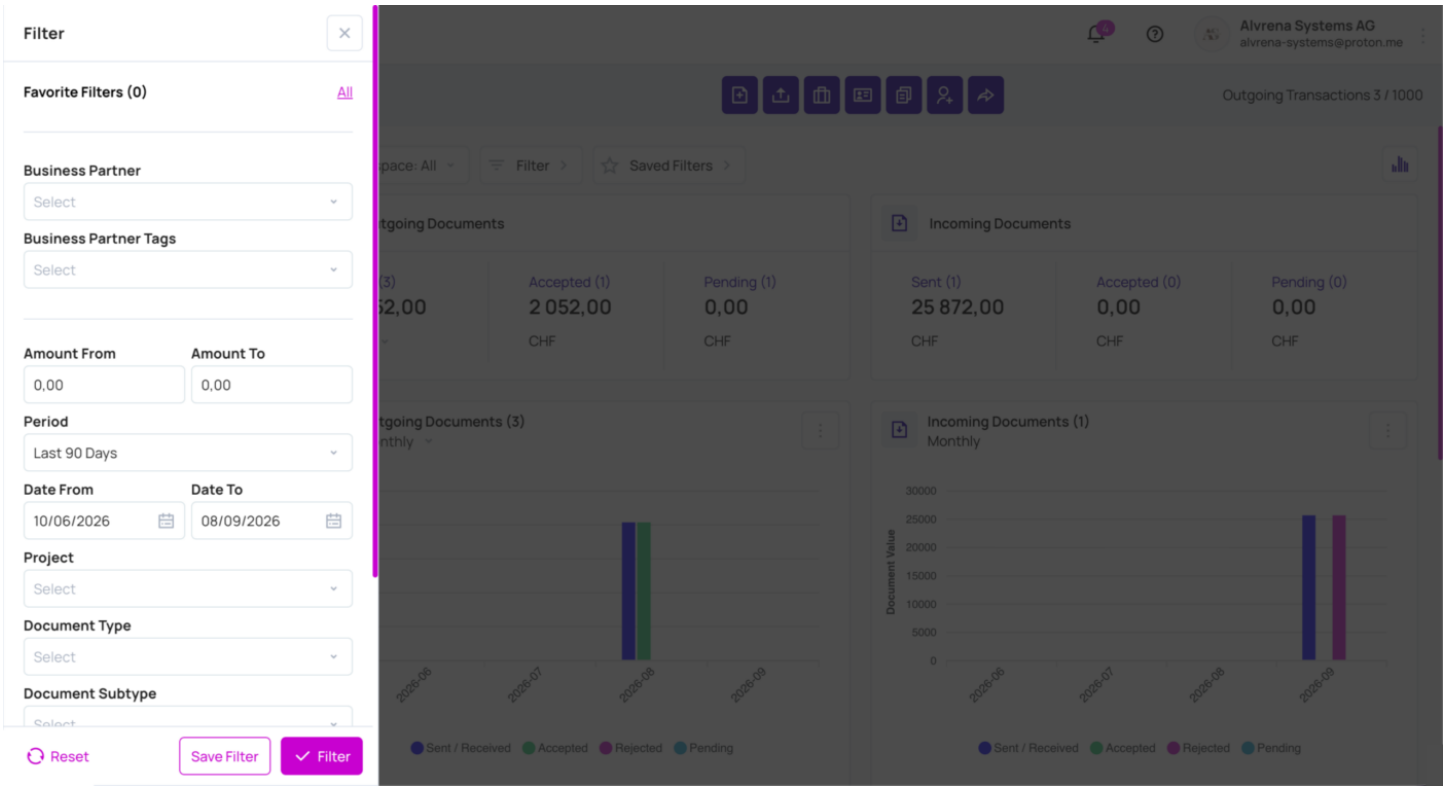
Filters

Filter opens a panel that narrows the Dashboard by **Business Partner**, **Business Partner Tags**, **Amount From** and **Amount To**, **Period**, **Date From** and **Date To**, **Project**, **Document Type**, **Document Subtype**, **Inbound / Outbound**, **Status**, and **Document Tags** — enough to pin down a single document or a whole set, such as every unpaid invoice from one partner this quarter. **Reset** clears the filter, **Filter** applies it, and **Save Filter** stores it for reuse.

Saved filters open from **Saved Filters**, where each can be marked as a favorite, edited, or deleted. A saved filter turns a search run often into a single click.



Note: The filter governs what the list shows and what an export contains. Only the filtered documents are exported. Export is run from the document list menu; see the Other Features page.


Filter
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All
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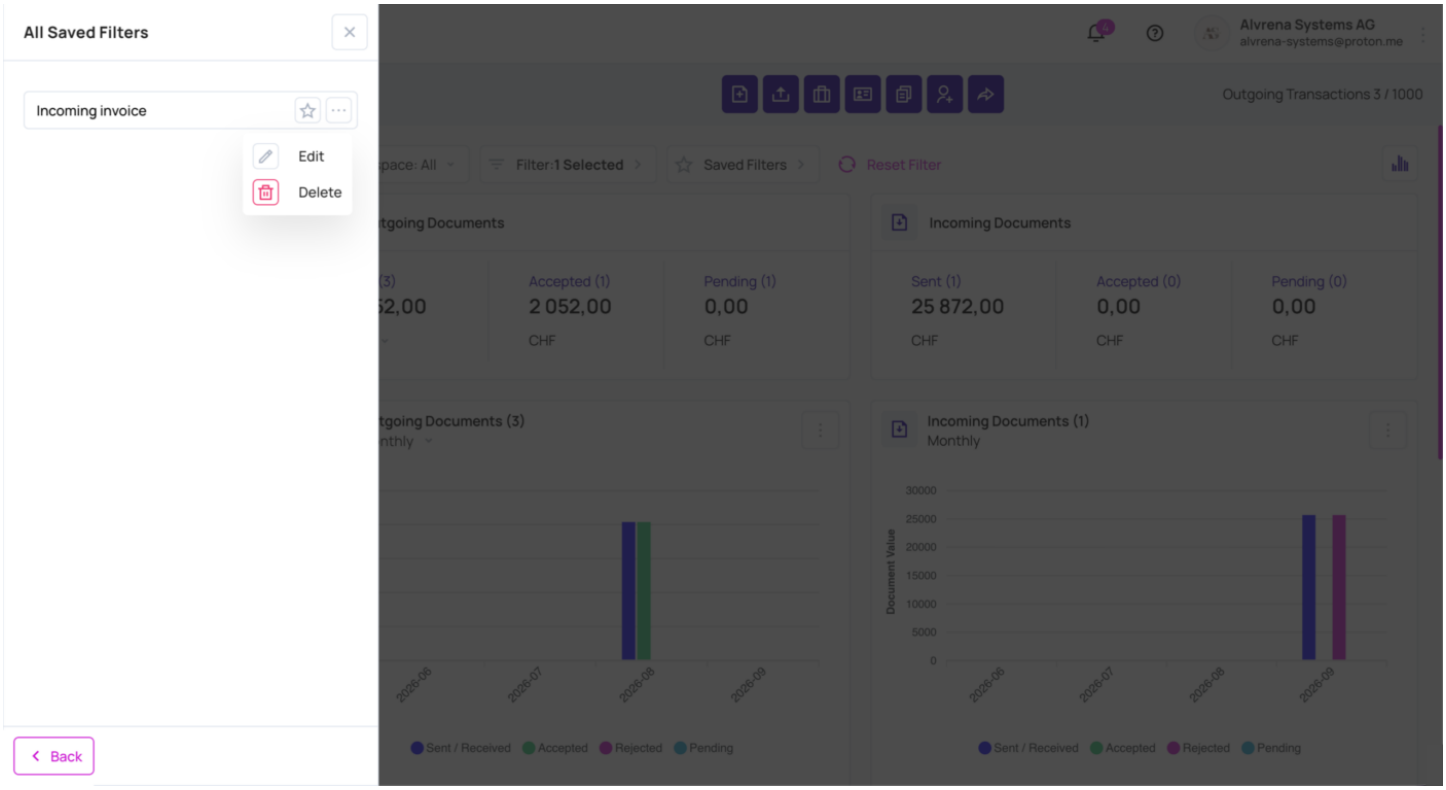
All Saved Filters
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Reminders

My Reminders on the Home page and the **Reminders** page in the sidebar list the reminders attached to documents, so a follow-up on a specific document is not forgotten. Creating and editing reminders is covered on the Other Features page.