
# Navigating Cin7 Core – User Guide (Module 1)

**Overview of Cin7 Core**

Cin7 Core is a cloud-based **inventory management** and ERP solution designed for small businesses. It streamlines daily operations by synchronizing your inventory, sales, purchasing, and accounting data in one system. In this guide, we'll outline the main areas of the Cin7 Core interface and basic navigation so you can quickly find information and perform tasks.

**Main Navigation Sections**

Cin7 Core's interface is organized into several primary sections accessible from the main menu (usually on the left side). The key areas include the **Dashboard**, **Inventory**, **Sales**, **Purchases**, and **Settings**. Below is a brief summary of each section and what you can do there:

**Dashboard**

The **Dashboard** gives you an at-a-glance window into your organization's status. It displays key information like current sales performance, outstanding orders, bills to be paid, and other indicators of business health. The Dashboard is made up of widgets (such as Key Performance Indicators and Order/Sales summaries) that you can expand or collapse as needed. This is the first screen you see upon logging in, making it a quick starting point for checking recent business activity.

**Inventory**

The **Inventory** module is where you manage all products and stock in Cin7 Core. Use this section to add new products or services, update product details (prices, descriptions, etc.), and import product lists in bulk. You can also monitor stock levels and movements here – for example, viewing how much stock is on hand, on order, allocated, or available across your warehouses. Common inventory tasks like stock adjustments (to correct


quantities or add/remove stock) and stocktakes (physical inventory counts) are performed in this module. In short, **Inventory** is your central hub for anything related to products and quantity on hand.

**Sales**

The **Sales** module covers all processes for selling to your customers. This is where you create and manage sales transactions – from quotes and sales orders to invoices and customer payments. In Sales, you can enter new customer orders (for products or services), fulfill orders through picking/packing/shipping, and finalize sales by issuing invoices. You'll also find your customer list here and can review order statuses (e.g. whether an order is pending, fulfilled, or paid). The Sales section essentially helps you track the entire order lifecycle, ensuring you can go from an initial order to a completed sale smoothly.

**Purchases**

The **Purchases** module is used for procuring stock and managing supplier orders. In this section, you can create purchase orders to buy products from your suppliers and then record the receipt of stock against those orders. It also allows you to handle supplier invoices and credits – for instance, linking the supplier's invoice to the corresponding purchase order when the goods are received. Use Purchases to keep track of incoming inventory, monitor what's on order, and maintain records of supplier transactions. Essentially, **Purchases** helps ensure you have the stock you need by managing everything from placing orders with suppliers to receiving and billing.

**Settings**

The **Settings** area is where you configure your Cin7 Core account and system preferences. It includes a range of configuration options to tailor the system to your business needs. For example, under **General Settings** you can set up company information like your base currency, time zone, and tax rules. You can also manage user accounts and permissions here – controlling who can access certain modules or perform specific actions.


Additionally, Settings is where you integrate with other systems (e.g. connect Cin7 Core to your accounting software) and adjust module-specific options (such as customizing how the sales or purchase process works for your organization). In summary, **Settings** is the administrative section for setting up and fine-tuning Cin7 Core.

**Basic Functionality Guide**

Beyond knowing the sections, here are some basic functions to help you navigate and use Cin7 Core efficiently:

- **Searching for Products:** To quickly find a specific product, go to the **Inventory > Products** list. Use the search box or filters on the Products page to locate items by name or SKU. The product list screen includes a search option so you can filter the list and find what you need without scrolling. For example, typing a product name or code in the search field will narrow down the list to matching items.
- **Viewing Recent Orders:** Cin7 Core makes it easy to review your latest sales orders. On the **Dashboard**, you might see a summary of recent or outstanding orders at a glance. For a detailed look, navigate to **Sales > Sales** to view all orders. In the Sales list, you can sort or filter orders by date, or use the search box (at the top-left of the list) to find an order by number, customer name, or other details. This allows you to quickly pull up a recent order to check its status or details.
- **Accessing Reports:** Cin7 Core provides a Reports section with dozens of built-in reports for analyzing your sales, inventory, purchasing, and more. To access these, click on **Reports** in the main menu. You'll be taken to the list of available report types – from here, select a report (for example, a Sales Summary report or Inventory Aging report) to open it. You can then set report filters (like date range) and generate the report to view or export the data. The Reports module is your go-to place for getting insights and analytics out of your data.


**Navigation Tips and Shortcuts**

To navigate Cin7 Core more efficiently, consider these simple tips and shortcuts:

- **Browser Bookmarks:** If you find yourself using a particular screen frequently (for instance, the Products list or New Sale order screen), bookmark it in your web browser. This way, you can jump directly to that page without having to click through the menu each time. Bookmarks can save you a few steps and get you to your destination faster.
- **Use Filters and Search Fields:** Almost every list view (whether it's products, sales orders, purchase orders, etc.) in Cin7 Core has filter options or a search bar. Use these filters to narrow down results by criteria like date, status, or keyword, instead of manually scanning long lists. For example, filter the Sales list to show only "Pending" orders, or use the search box to find orders from a specific customer. This targeted searching makes finding information much quicker.
- **Quick Access Menu:** Cin7 Core features a Quick Access button on the top toolbar that provides shortcuts to recently used or common modules. Clicking this opens a menu of quick links (such as creating a new sale, new purchase, or opening a specific module directly). It's a handy way to jump to a task without navigating through the full menu. Think of it as a shortcut menu for your most frequent actions.
- **Keyboard Shortcuts:** While Cin7 Core's web interface is mostly point-and-click, you can still use basic keyboard tricks to speed up work. For instance, when filling out forms or creating an order, use the **Tab** key to move through fields quickly. If you need to find text on a page (say you have a long list of products), use your browser's find function (Ctrl+F on Windows, Command+F on Mac) to search within the page. These small shortcuts can make data entry and navigation faster and more seamless.


**Recap Checklist**

Before we conclude this module, here's a quick checklist to recap and ensure you're comfortable with the basics of navigating Cin7 Core:

- **Identify Main Sections:** Make sure you can locate and click on the Dashboard, Inventory, Sales, Purchases, and Settings in the Cin7 Core interface. (Do you know what each section is for at a high level?)
- **Dashboard Overview:** Can you interpret the Dashboard widgets to see your current orders or KPI summaries? Practice resizing or closing a widget if needed for a customized view.
- **Find a Product:** Try using the Inventory module to search for a specific product by name or SKU. Confirm that you know how to open a product's detail page.
- **Locate an Order:** Go to the Sales module and find a recent sales order. Check that you can use the search or filters to pull up the order, and open it to view its details.
- **Access a Report:** Navigate to the Reports section and locate a report (for example, an Inventory Stock on Hand report). Ensure you know how to run a report and adjust basic filters (like choosing a date range).
- **Explore Settings:** Visit the Settings area and find at least one setting (for instance, your organization's details or user management). You don't need to change anything yet, just see where key settings are.

By completing the above checklist, you'll confirm that you can comfortably navigate the Cin7 Core system's main areas. Mastering these basics will make you ready to dive deeper into each module in the upcoming training sessions. Good job on finishing Module 1 – happy navigating!