

Find your way around the dashboard

Getting started

The dashboard is where your team writes articles, designs your help center and manages its settings. Here's what's where, so you can get anywhere in a click or two.

Who can do this: Everyone on your team (what you see depends on your role) ·
Plans: All plans

The left menu

Menu item	What you do there
Articles	Write, edit, organize and publish articles and categories.
Change sets	Group changes to many articles and publish them together. Part of the Catalyst plan.
Template editor	Design your help center: theme, logo, colors, pages and navigation.

Statistics See visitors, searches, article views and ratings.

Comments

Approve and answer reader comments. It appears once you publish a design that has the Comments component.

Trash

Restore articles you deleted.

At the bottom of the menu:

- **The gear icon** opens **Settings** (visibility, custom domain, AI features, API keys, integrations and more), **Localization** (languages and interface texts), **Users** (your team) and **Embeddables** (the widget, proactive messages and FAQ sections).
- **Send feedback** lets you tell us what's working and what could be better.
- **What's New** shows recent product updates.
- **Your avatar** opens **Account Settings** (your profile, password and two-factor authentication), **Billing & Invoices**, **Need Help?** (this help center) and **Log out**.

Switch help centers

Hover over the logo at the top of the left menu to see which help center you're in. Click the arrow to list your other help centers, then pick one. You stay in the same section, so if you're on Statistics, you land on Statistics.

Articles

31 articles · 6 FAQs · 35 published · 2 drafts · 0 awaiting review

All articles Needs review Drafts Pending changes Most viewed + Save view

Search titles and content... All types Articles (31) FAQs (6)

Any category 38

CATEGORIES + Add category

- Getting started 5
- > Home Dock charger 5
- Plans & billing 6
- Account & security 4
- Troubleshooting 5
- Solar & battery 4

All (37) Published (35) Drafts (2) Unpublished (0)

☐ Select all

☐ Set up your first charging schedule
Updated just now **PR** Priya Raman

☐ Welcome to Northwind
Updated 1d ago Maya Chen

☐ What happens during a power outage **FAQ**

1 Hover the logo to see which help center you are in

A lock means a help center isn't public. A globe means it has more than one language.

See [Switch between your help centers](#) for more.

The Articles page

- **Categories** sit on the left. Click one to filter the list, or drag articles onto it to move them.
- **Views** run across the top, such as **All articles**, **Drafts** and **Most viewed**. Click **Save view** to keep your current filters one click away.
- **Search** looks through titles and content.

- **Status tabs** narrow the list: **All**, **Published**, **Drafts**, **Unpublished**, **In review** and **Private**.
- **Article details** open when you click an article: its status, statistics and translations. **New article** and **View help center** are at the top right.

The screenshot shows the Northwind user interface. At the top, there is a search bar labeled "Search titles and content...". Below it, there are tabs for "All types", "Articles (31)", and "FAQs (6)". To the right, there are filters for "All authors", "English (default)", and "Sort by Last modified". On the left side, there is a sidebar with a "Any category" section showing 38 items. Below this, there is a "CATEGORIES" section with a list of categories and their counts: "Getting started" (5), "Home Dock charger" (5), "Plans & billing" (6), "Account & security" (4), "Troubleshooting" (5), "Solar & battery" (4), and "Uncategorized" (6). The main content area displays a list of articles. Each article has a checkbox, a title, a date, an author, a category, and a status. The articles shown are: "Set up your first charging schedule" (Updated 12m ago, PR Priya Raman, Getting started, Published), "Welcome to Northwind" (Updated 2d ago, MC Maya Chen, Getting started, Published), "What happens during a power cut?" (Updated 2d ago, MC Maya Chen, Uncategorized, Published), "Update your profile" (Updated 2d ago, MC Maya Chen, Account & security, Published), "Update your Home Dock firmware" (Updated 3d ago, PR Priya Raman, Home Dock charger, Published), "I was charged twice this month" (Updated 3d ago, MC Maya Chen, Troubleshooting, Published), and "Download your invoices" (Updated 4d ago, MC Maya Chen, Plans & billing, Published). At the bottom of the screenshot, there is a dark blue banner with the text "1 Search titles and content".

1 Search titles and content

Saved views are kept in your browser.

See [Find articles with search and filters](#) for every filter and sort option.

What each role sees

Role

What's in their menu

Owner and Admin	Everything above, including Template editor and the gear menu.
Editor	Articles, Change sets, Statistics, Comments and Trash . Editors reach the template editor with Customize on your help center.
Translator	Articles , to translate them into your other languages.
Viewer	No dashboard. Viewers read the help center itself.

Only the account owner can manage a help center's subscription under **Billing & Invoices**. See [Roles and permissions](#) for everything each role can do.

Get around faster

- **From your help center.** When Owners, Admins and Editors open their help center while signed in, a toolbar in the bottom right corner links to the **Dashboard**, to **Customize** and, on article pages, to **Edit article**.
- **With shortcut links.** Links such as helpcenter.io/app/settings, helpcenter.io/app/team and helpcenter.io/app/statistics open that section. If you have several help centers, you pick one first.

Related articles

- [Switch between your help centers](#)

- [Find articles with search and filters](#)
- [Get started with the template editor](#)
- [Roles and permissions](#)