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.

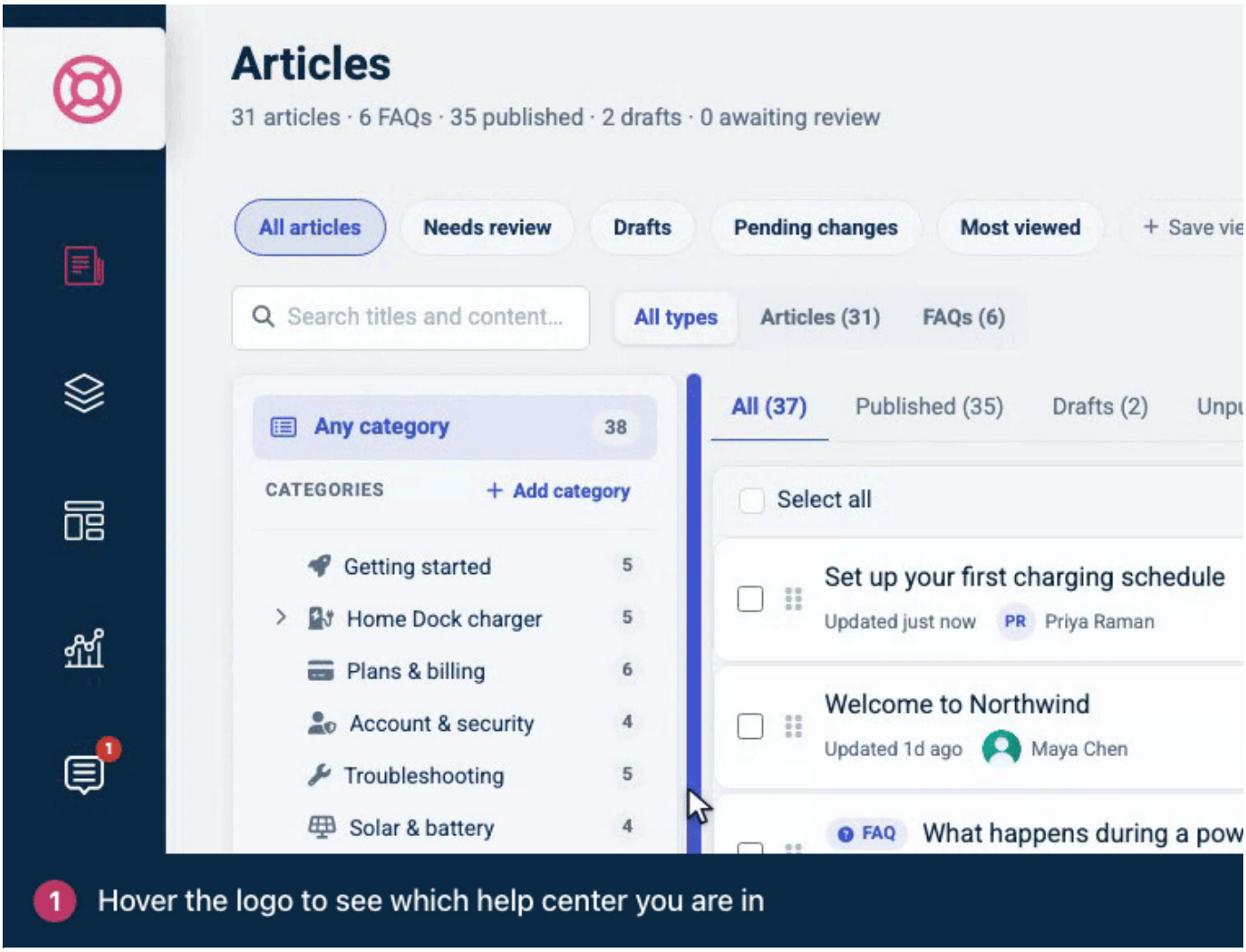
Statistics	See visitors, searches, article views and ratings.
Comments	Approve and answer reader comments. It appears once you publish a design that has the Comments component.
Trash	Restore articles you deleted.

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?** (search this help center in a side panel, like the **Need help?** tab on the right edge of every page) 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.



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

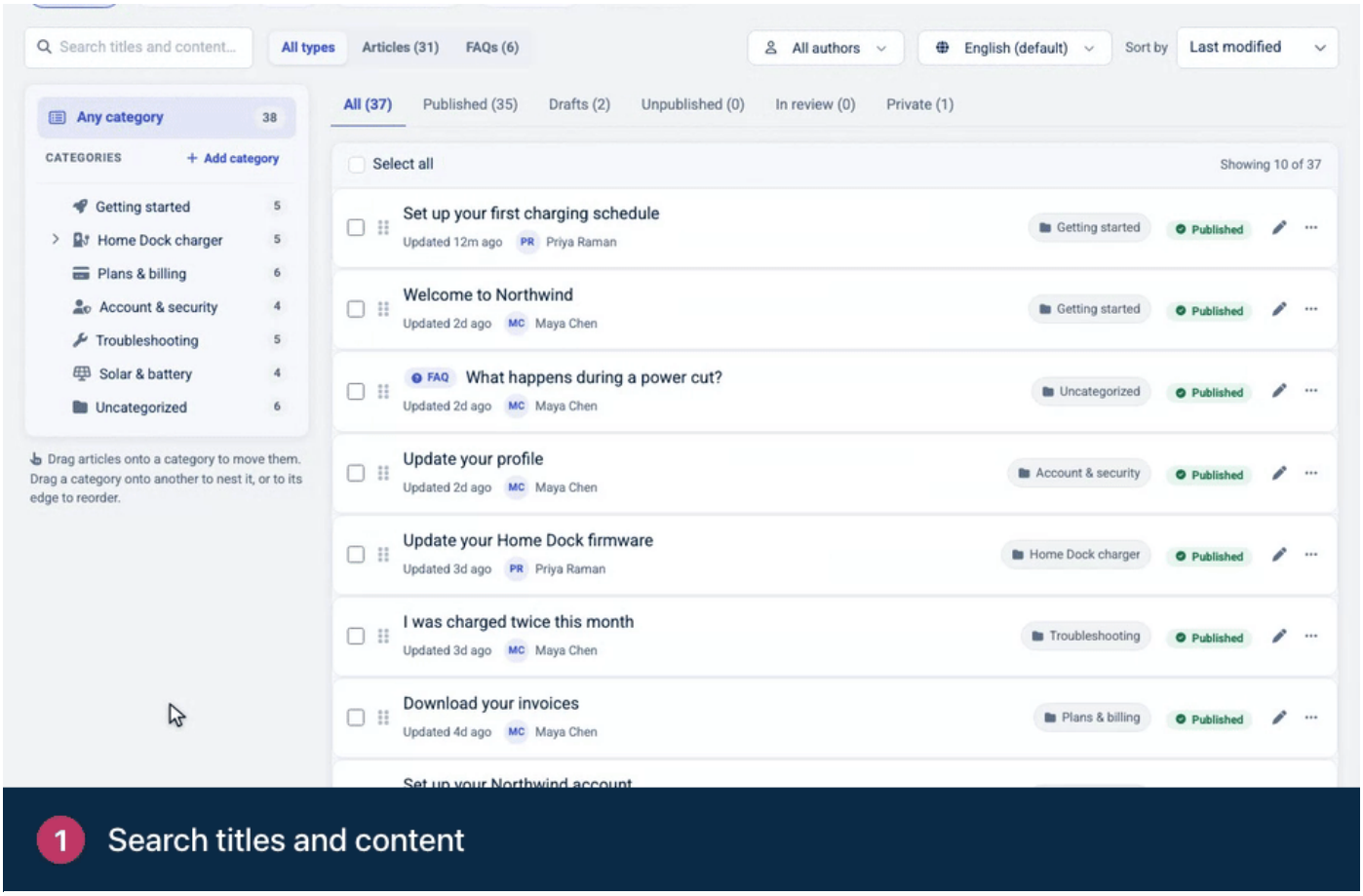
See Switch between your help centers for more.

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.



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