

System Settings & the Navigation Menu

System Settings

Administration → **Settings** holds system-wide options. The ones you might reasonably touch:

- **Application name, time zone, date & number formats, week start, default currency, language** — locale and cosmetic defaults.
- **Outbound email** basics — covered in [Chapter 5 — Integrations](#).

“ Most settings apply immediately and are safe to adjust. If a setting mentions caching, performance, or "developer" options and you're unsure, **leave it** — and Sandbox-test anything you're uncertain about.

The Navigation Menu (Tab List)

The left sidebar is the **Tab List**: Administration → **User Interface** → **Tab List**.

- Add or remove tabs, **drag to reorder**, and group them with dividers.
- This is where the **Documentation** tab lives — a URL tab pointing at the docs site (see [The Documentation Site](#)).
- To add an external link: **Add → URL**, set the label and URL, drag into place, **Save**. (CBM's external tabs are set to open in a new browser tab via a small customization.)

“ The Tab List you edit here is the **default for everyone**. Individual users can further customize their own tabs in their preferences.

Dashboards

- The dashboard is the landing page of tiles ("dashlets"). You can set a sensible default layout; users can rearrange their own.

Wording (Label Manager)

- Administration → **Label Manager** changes the words shown in the interface without changing the underlying configuration. Use it sparingly and Sandbox-test — a relabel that drifts from training or these guides confuses users.

What does *not* belong here

Changing **fields, layouts, or record types** is **not** done casually in this area — it follows the sandbox-first process in [Making Configuration Changes](#).

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