



Dashboard and Widget Design

Benjamin Crisman

Support Engineer

Timing and Agenda

July 26, 2022 -10 AM -11 AM

Day 1

Lesson 1.1: Designing a Dashboard

Lesson 1.2: Administering Dashboard Forms

July 27, 2022 -10 AM -11 AM

Day 2

Lesson 2.1: Specifying General Widget Settings

Lesson 2.2: Configuring Header, Table, Link, and Embedded Page Widgets

Lesson 2.3: Configuring KPI Widgets

Timing and Agenda

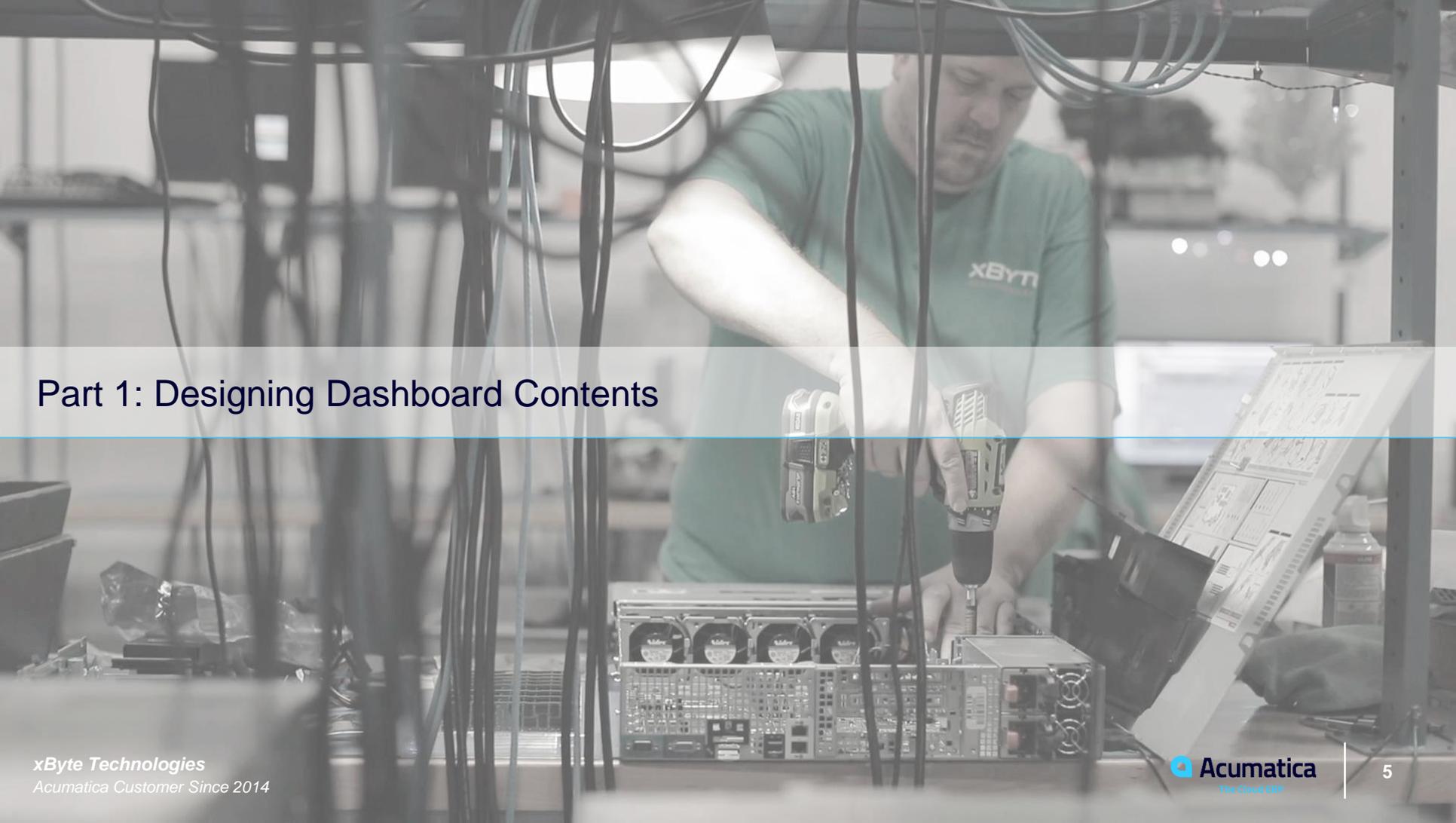
July 28, 2022 -10 AM -11 AM

Day 3

Lesson 2.4: Configuring Chart Widgets

Lesson 2.5: Filtering Widget Data

Day 1



Part 1: Designing Dashboard Contents

Lesson 1.1: Designing a Dashboard

Learning Objectives

In this lesson, you will learn how to do the following:

- Identify the basic elements of an Acumatica ERP dashboard and their functions
- List the basic steps of designing a dashboard
- Modify your copy of a dashboard
- Define a dashboard as your home page
- Reset a dashboard

Figure: Basic elements of a dashboard in design mode

The image shows a dashboard in design mode with the following elements highlighted by numbered callouts:

- 1**: Controller (top left)
- 2**: Currency symbols and widget icons (top left)
- 3**: Lock icon and widget icons (middle left)
- 4**: Refresh icon and widget icons (middle left)
- 5**: Empty widget area and widget icons (middle left)
- 6**: Add new widget, paste from clipboard, and drag widget here options (bottom left)
- 7**: RESET TO DEFAULT button (top right)
- 8**: EDIT LAYOUT button (top right)
- 9**: REFRESH ALL button (top right)
- 10**: DESIGN button (top right)

The dashboard content includes:

- CASH POSITION**: A line chart showing cash position from 2020 - Jan to 2020 - Aug. The y-axis ranges from 190,000 to 260,000. The data points are approximately: 2020 - Jan: 255,000; 2020 - Feb: 200,000; 2020 - Aug: 200,000.
- TOP OVERDUE BALANCES**: A horizontal bar chart showing overdue balances for various businesses. The x-axis ranges from 0 to 8,000. The data points are approximately: Thai Food Restaurant: 7,000; HM's Bakery & Cafe: 5,500; Morning Cafe: 4,500; FourStar Coffee&Sweets Shop: 3,000; GoodFood One Restaurant: 1,000; Candy Cafe: 500.

Figure: Selection of a dashboard layout

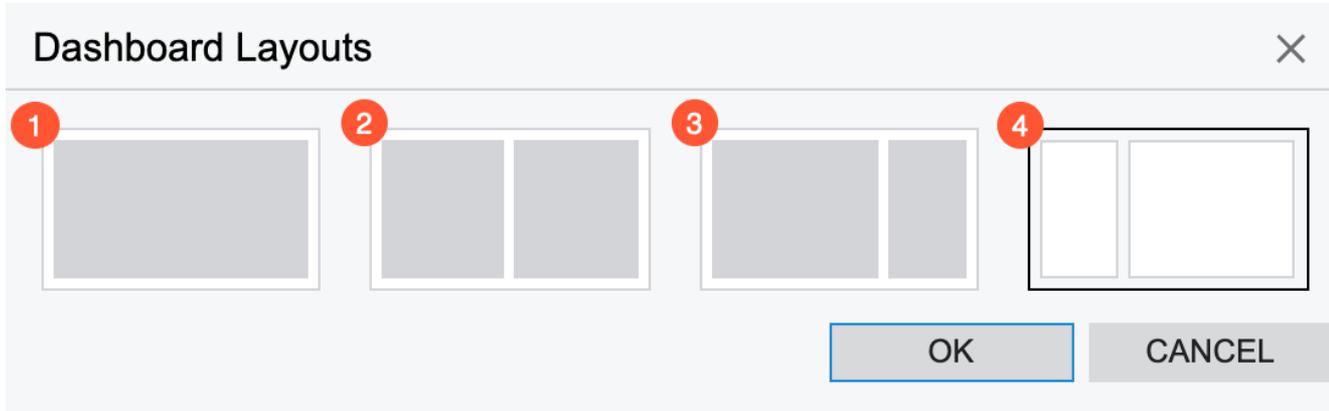


Figure: A dashboard with empty space between working areas

Sales Operations

PROPERTIES

EDIT LAYOUT

REFRESH ALL

DESIGN

TOOLS ▾

+ Assign Leads   

+ Assign Opportunities   

    70

UNASSIGNED LEADS

    70

UNASSIGNED OPPS

LEADS   

 7    543

NURTURED LEADS NO CALL 30+

 7    70

NEW LEADS 7+ DAYS OLD

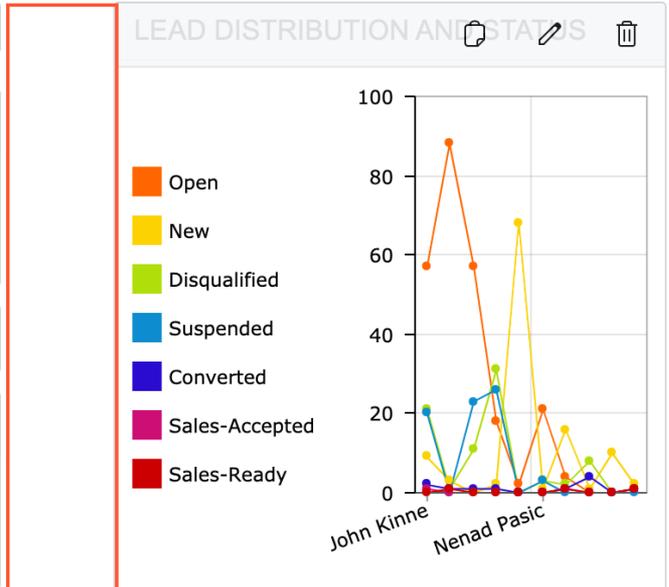


Figure: A dashboard with two rows

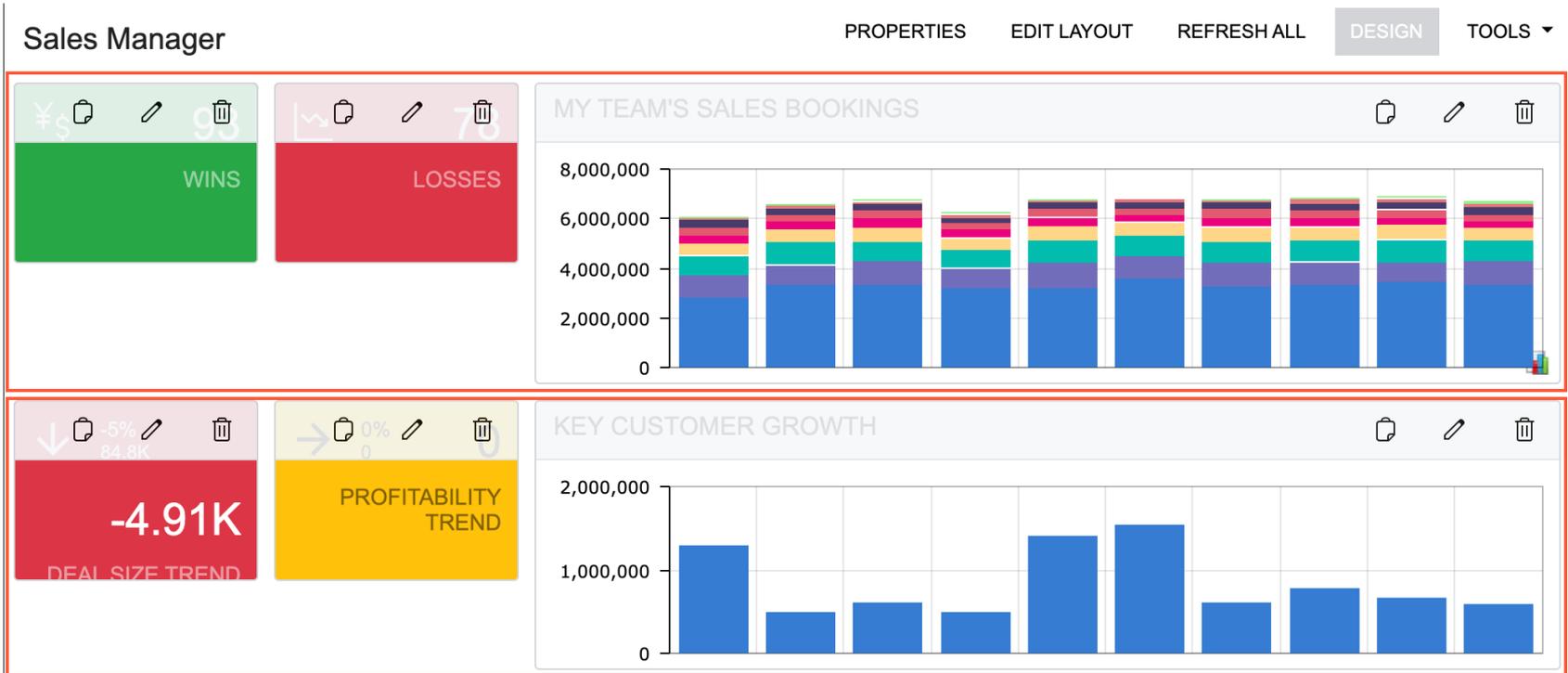


Figure: Clicking of the widget title to drill down

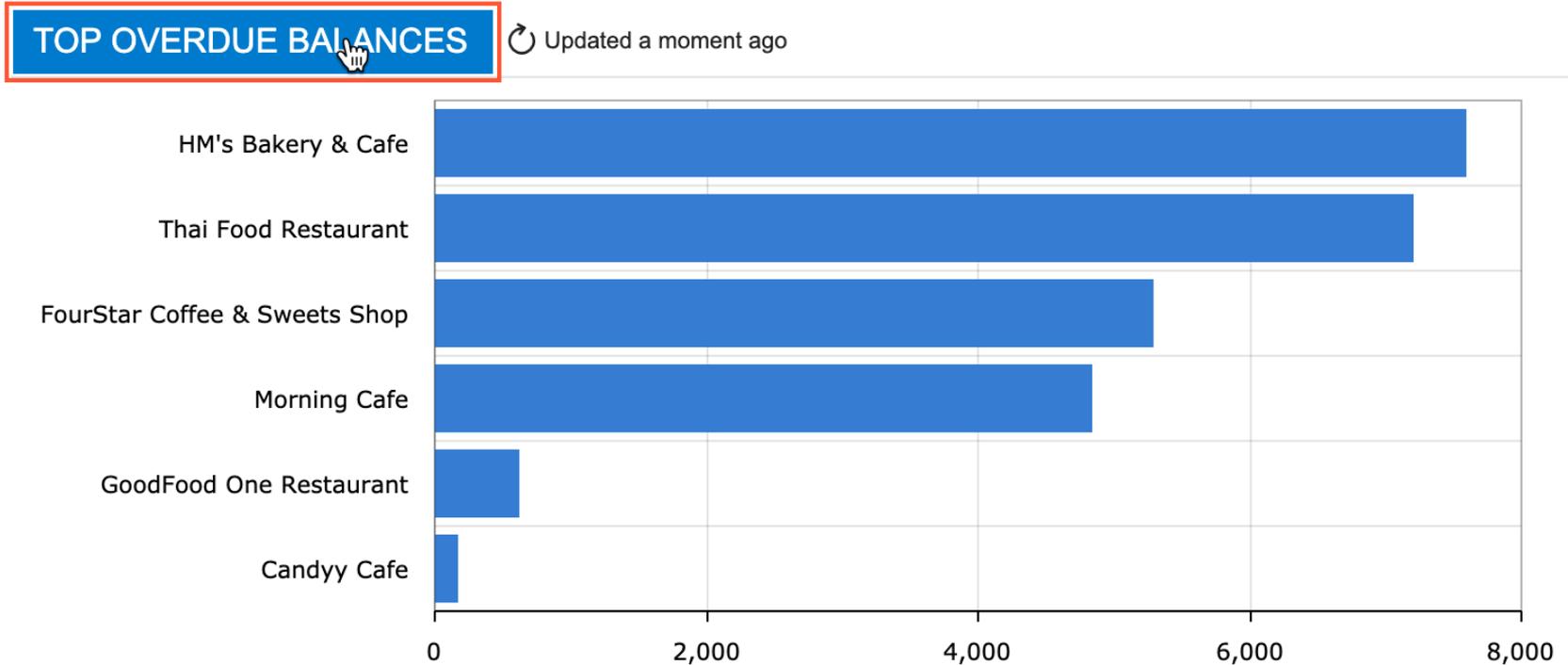


Figure: A chart with an area selected for zooming in

OPPORTUNITY DISTRIBUTION AND STATUS Updated 3 min ago

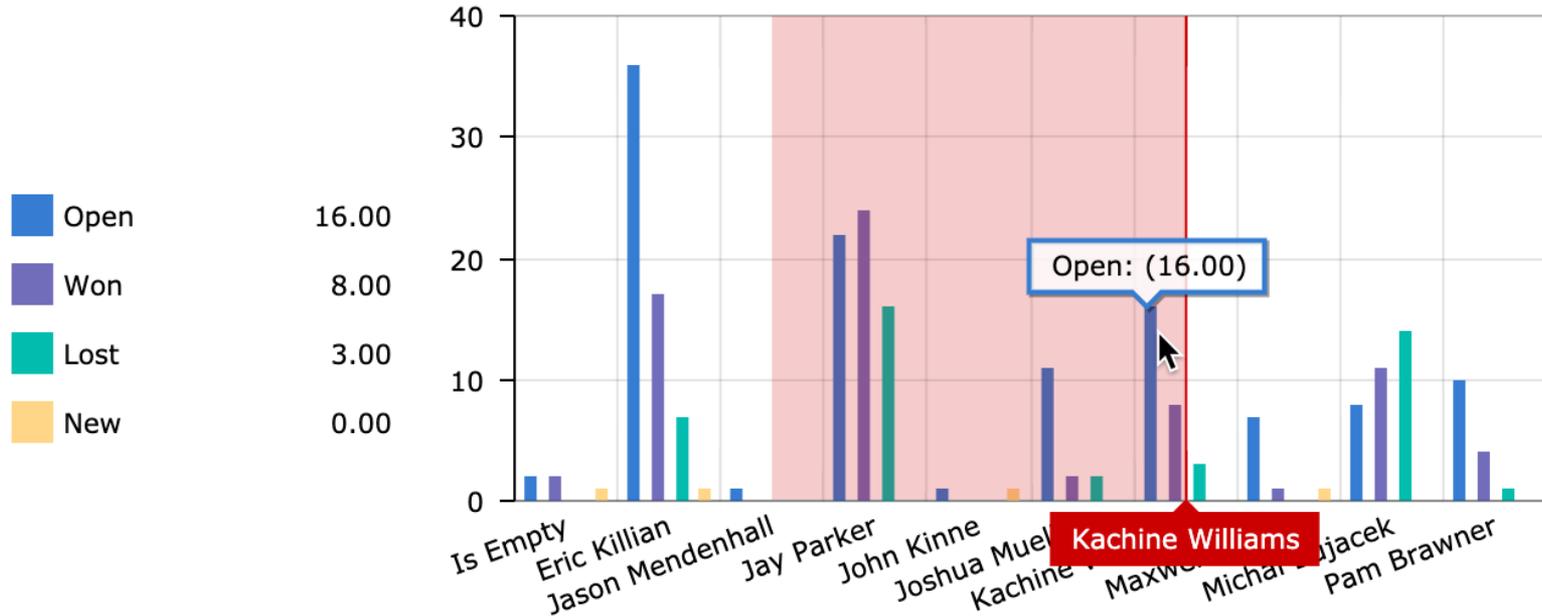


Figure: A chart with the details displayed for a data point

LEAD DISTRIBUTION AND STATUS Updated 8 min ago

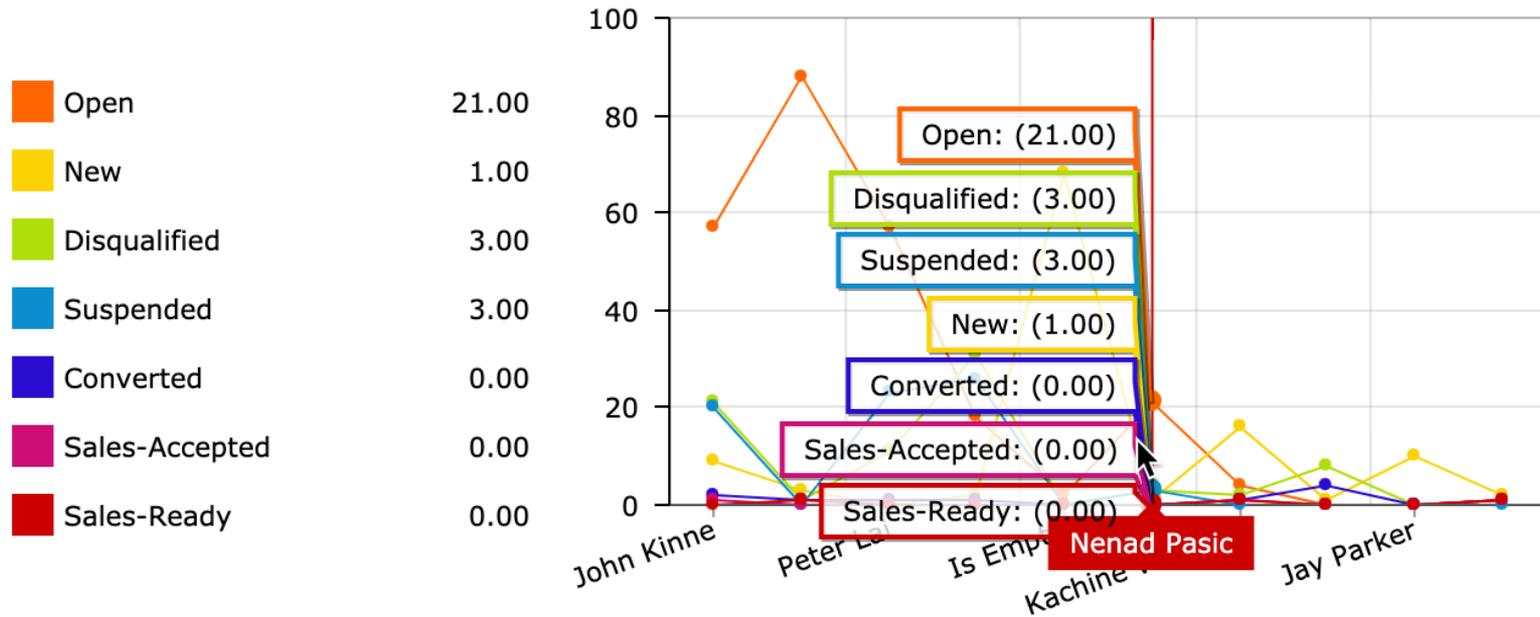


Figure: A chart with the legend icon shown

OPPORTUNITIES GENERATED BY SOURCE

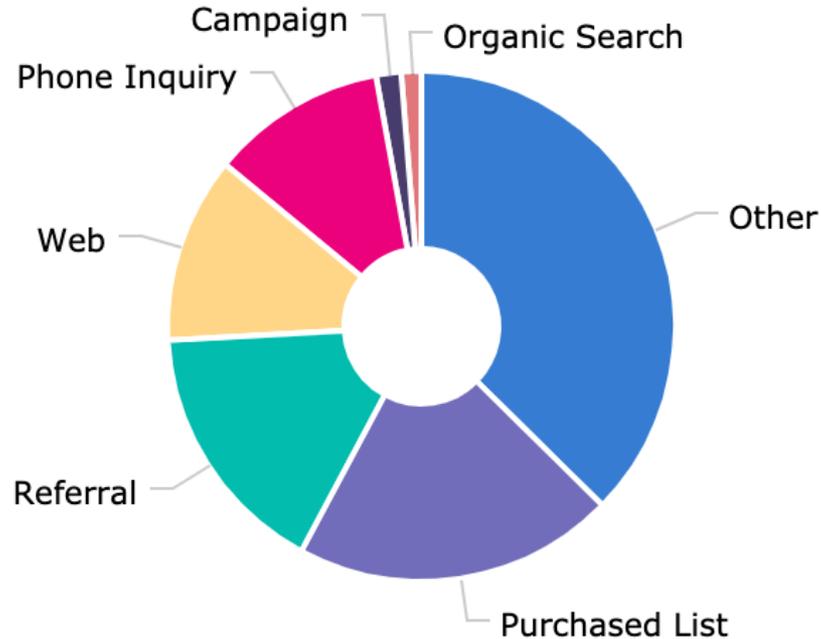
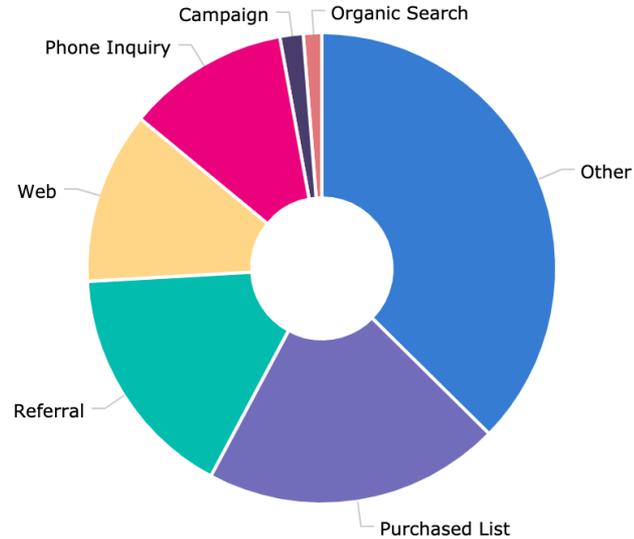


Figure: A chart with data excluded

OPPORTUNITIES GENERATED BY SOURCE



Other	117.00	Purchased List	64.00
Referral	51.00	Web	37.00
Phone Inquiry	35.00	Is Empty	9.00
Campaign	5.00	Organic Search	4.00

Figure: Table data sorted by the Open Order Total column in ascending order

OPEN SALES ORDERS

Order Number	Customer	Status	Customer Name	Order Date	Description	Requested On	↑ Open Order Total
000049	COFFEES...	Shipping	FourStar Coffee & Sweets Shop	1/25/2021	Sale of apple jam	1/30/2021	18.07
000053	COFFEES...	Shipping	FourStar Coffee & Sweets Shop	1/26/2021	Sale of apple jam	1/30/2021	31.63
000059	COFFEES...	Shipping	FourStar Coffee & Sweets Shop	1/28/2021	Sale of apple and orange jam	1/30/2021	37.34
000038	GOODFO...	Shipping	GoodFood One Restaurant	1/24/2021	Sale of apple jam	1/30/2021	49.70
000057	COFFEES...	Shipping	FourStar Coffee & Sweets Shop	1/27/2021	Sale of apple jam	1/30/2021	54.22
000029	RETSALE	Open	Individual Retail Customer	1/29/2021	Website order #00687	1/29/2021	56.45
000042	GOODFO...	Shipping	GoodFood One Restaurant	1/24/2021	Sale of orange jam	1/30/2021	56.62

Dashboard Design: To Modify a Dashboard

Story

Suppose that you are David Chubb, a new sales manager of the SweetLife Fruits & Jams company. You have been using a predefined dashboard to stay informed about customers with overdue accounts. You need to create your own copy of the dashboard in order to monitor the balances of these customers.

Figure: The dashboard without the cash-related widgets

Controller

RESET TO DEFAULT EDIT LAYOUT REFRESH ALL DESIGN TOOLS ▾

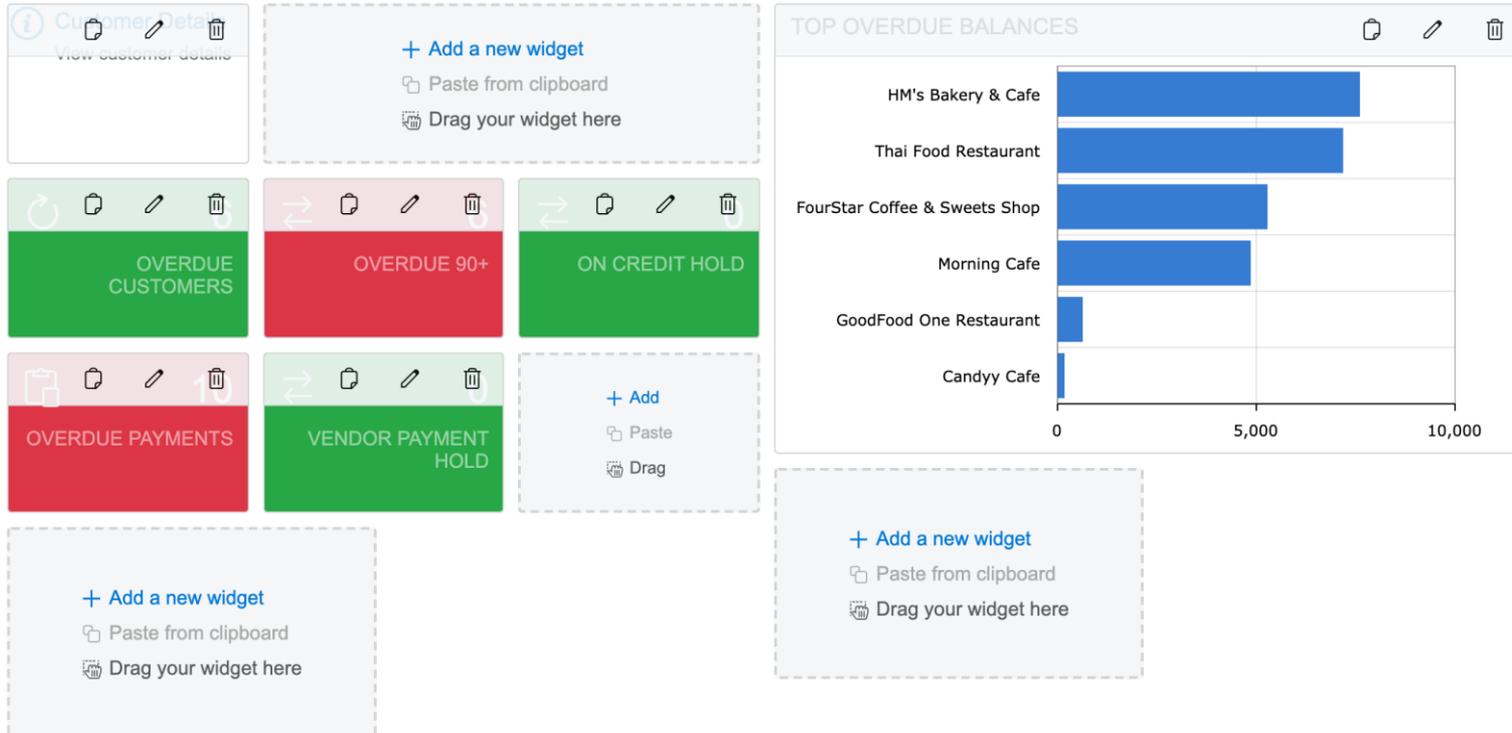


Figure: The dashboard layout with the wider left working area

Controller

RESET TO DEFAULT

EDIT LAYOUT

REFRESH ALL

DESIGN

TOOLS ▾

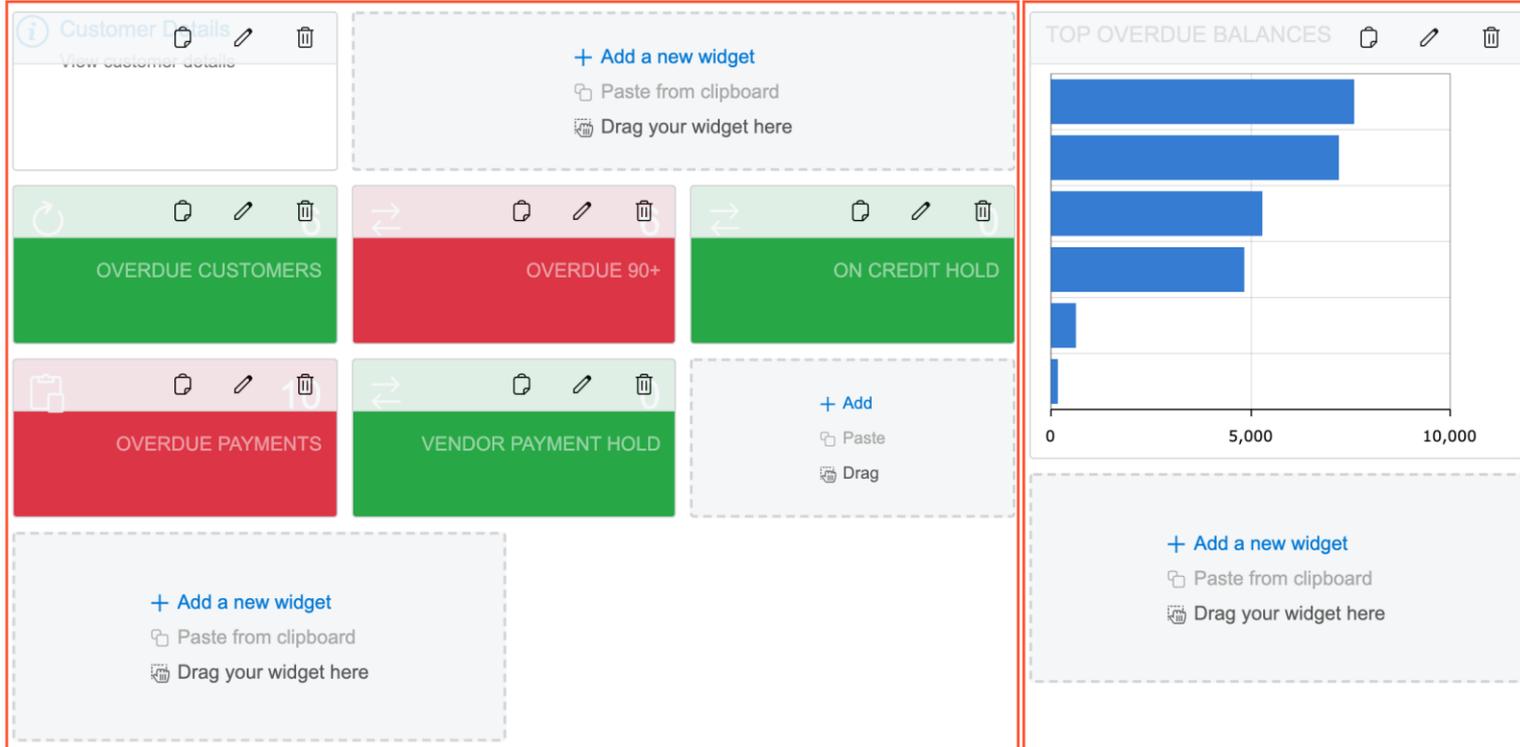


Figure: The dashboard with the relocated widgets

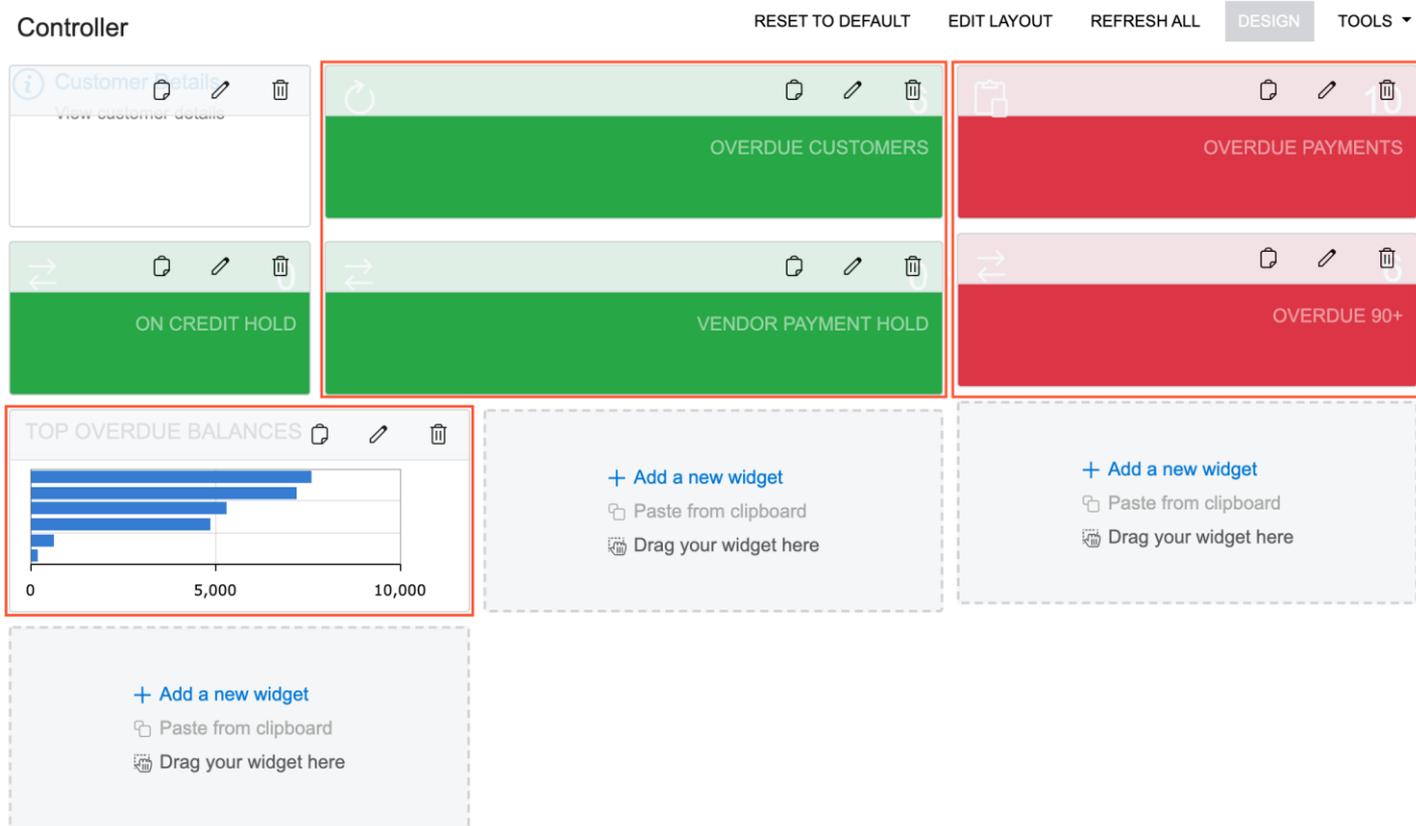
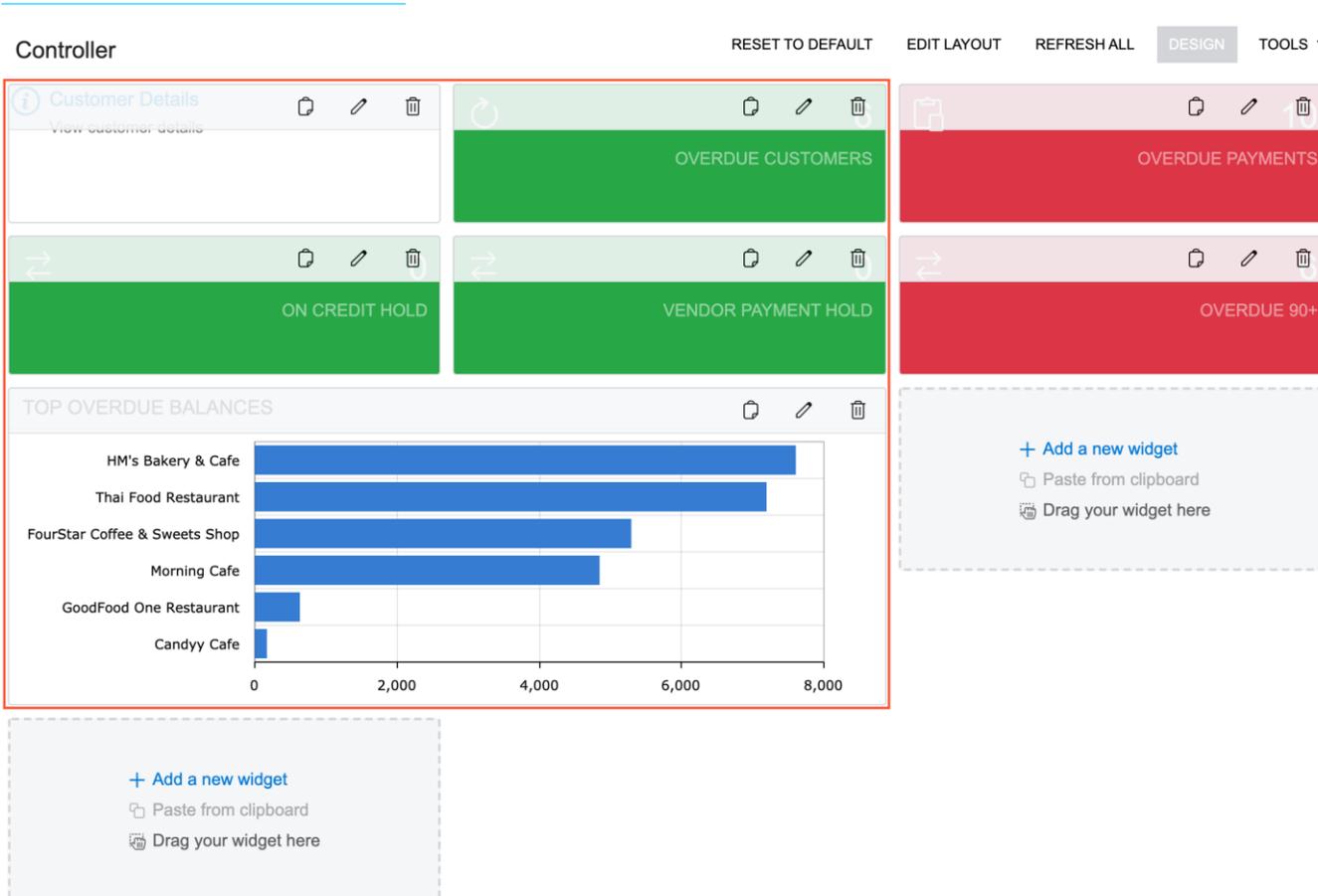


Figure: The dashboard with the resized widgets



Lesson 1.2: Administering Dashboard Forms

Learning Objectives

In this lesson, you will learn how to do the following:

- Create a dashboard form
- Manage access rights for the viewing and configuration of dashboards

Dashboard Forms: To Add a Dashboard Form

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company has requested a dashboard named Sales Mgr Dashboard. Every sales manager would like to have the capability to create a personal copy of the dashboard and populate it with widgets on their own.

The dashboard should be visible to sales managers only and made available through a link in the **Opportunities** workspace under the **Dashboards** category.

Figure: Sales Mgr Dashboard viewed by a sales manager

The screenshot displays the SweetLife dashboard interface. At the top, a blue navigation bar contains the SweetLife logo, a search bar, a refresh icon, the company name 'SweetLife Fruits & Jams', the location 'SweetLife Head Office and Wh...', the date and time '10/12/2020 11:56 AM', a help icon, and the user profile 'David Chubb'. Below the navigation bar, a sidebar on the left lists menu items: 'Favorites', 'Data Views', 'Receivables', and 'Opportunities'. The main content area shows 'Sales Mgr Dashboard' with a star icon. To the right of the dashboard title, there are three buttons: 'CREATE USER COPY', 'REFRESH ALL', and 'TOOLS'.

Figure: Sales Mgr Dashboard viewed by the owner of the dashboard

The screenshot displays the top navigation bar of the SweetLife system. On the left is the SweetLife logo. The main navigation bar contains a search field, a refresh icon, the organization name 'SweetLife Fruits & Jams', the current date and time '10/12/2020 12:49 PM', a help icon, and the user name 'Kimberly Gibbs'. Below the navigation bar, the left sidebar shows 'Favorites', 'Data Views', and 'Opportunities'. The main content area shows 'Sales Mgr Dashboard' with a star icon, and action buttons for 'REFRESH ALL', 'DESIGN', and 'TOOLS'.

	<input type="text" value="Search..."/>		SweetLife Fruits & Jams SweetLife Head Office and Wh...	10/12/2020 12:49 PM		Kimberly Gibbs		
☆ Favorites	Sales Mgr Dashboard ☆					REFRESH ALL	DESIGN	TOOLS ▾
Data Views								
Opportunities								

Figure: Sales Mgr Dashboard viewed by the owner of the dashboard

The screenshot displays the top navigation bar of the SweetLife system. On the left is the SweetLife logo. The main navigation bar includes a search field, a refresh icon, the organization name 'SweetLife Fruits & Jams', the current date and time '10/12/2020 12:49 PM', a help icon, and the user profile 'Kimberly Gibbs'. Below the navigation bar, the left sidebar shows 'Favorites', 'Data Views', and 'Opportunities'. The main content area shows 'Sales Mgr Dashboard' with a star icon, and action buttons for 'REFRESH ALL', 'DESIGN', and 'TOOLS'.

SweetLife Search... SweetLife Fruits & Jams SweetLife Head Office and Wh... 10/12/2020 12:49 PM Kimberly Gibbs

☆ Favorites Data Views Opportunities

Sales Mgr Dashboard ☆ REFRESH ALL DESIGN TOOLS

Day 2



Part 2: Configuring Widgets

Lesson 2.1: Specifying General Widget Settings

Learning Objectives

In this lesson, you will learn how to do the following:

- Recognize the types of widgets and their main features
- Configure different types of widgets
- Filter the data that is used for a widget

Figure: The Add Widget dialog box with the Data Table widget type selected

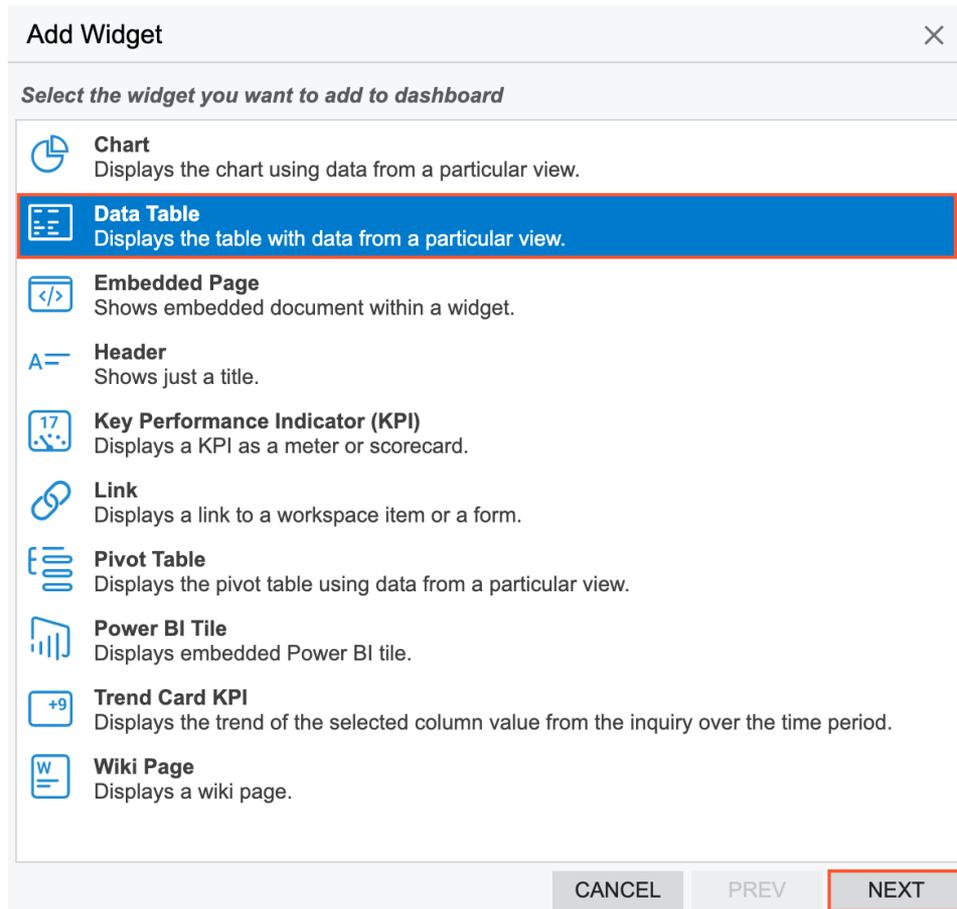


Figure: Caching settings of a widget

Widget Properties

Specify the widget properties

* Inquiry Screen:

INQUIRY PARAMETERS

Shared Filter to Apply:

FILTER SETTINGS

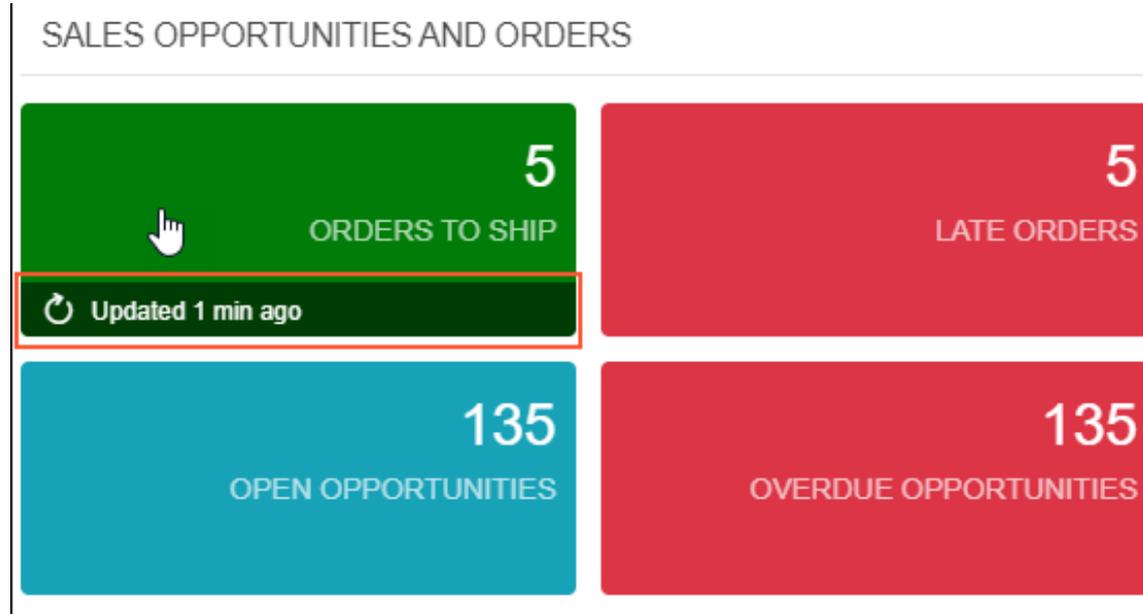
Refresh Data:

- On Page Reload
- Every 5 Min
- Every 15 Min
- Every 30 Min
- Every Hour
- Every 4 Hours
- Every 12 Hours
- Every Day
- Every Week

Caption:

CANCEL FINISH

Figure: Date and time of the last update of the widget's data



Widget Settings: To Change a Widget's Title and Caching Settings

Story

Suppose that you are David Chubb, a sales manager of the SweetLife Fruits & Jams company. You have created your own copy of the predefined *Controller* dashboard in order to monitor the balances of customers. Also, you have defined this dashboard as your home page.

You would like to change the predefined title for the *Overdue Customers* widget to *Overdue Customer Accounts*. Also, you would like the list of the top overdue balances to be updated every day, instead of using the default setting (which is On Page Reload).

Lesson 2.2: Configuring Header, Table, Link, and Embedded Page Widgets

Figure: Widgets grouped in sections under two header widgets

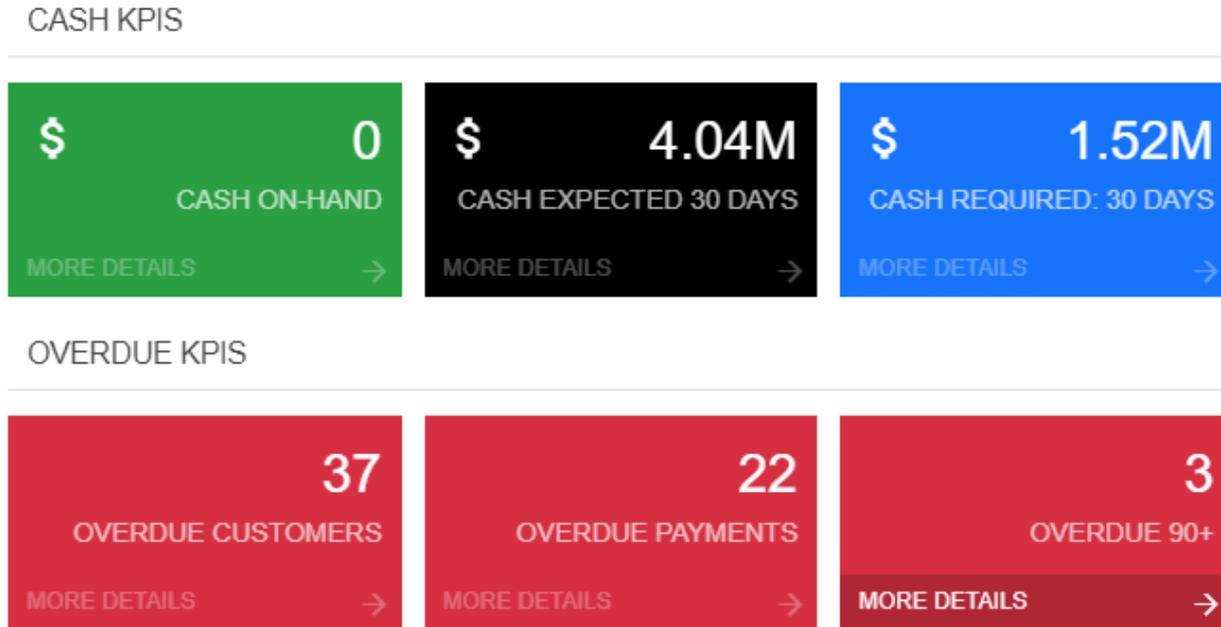


Figure: Properties of a header widget

Widget Properties ✕

Specify the widget properties

Caption:

CANCEL PREV FINISH

Figure: Data table widget

MY CASE DETAILS  Update

Case ID	Subject	Account Name	Last Incoming Activity	Last Outgoing Activity	Date Reported
000124	Client cannot access system - password	Artcages	1/9/2019	1/9/2019	1/9/2019...
000122	Verify tax address for future orders	El Centro Books	10/2/2018	10/2/2018	10/2/201...

Figure: Properties of a table widget

Widget Properties ✕

Specify the widget properties

* Inquiry Screen: 🔍

INQUIRY PARAMETERS

Shared Filter to Apply: 🔍

FILTER SETTINGS

Refresh Data: ▼

Automatically Adjust Height

Record Limit:

COLUMN SETTINGS

Caption:

CANCEL **FINISH**

Figure: Pivot table widget

🔄 OPEN CASES

Account N		Date Repo		
Bibimbab Korean Restaurant				
9/8/2017 1:39 PM		Total		
Account II	Estimation	Priority	Estimation	Priority
ABARTENDE				
ASBLBAR				
BIBIMBAB		1		
ELCENTROBO				
ELITEANSW				
SNOSHORT				

Figure: Properties of a pivot table widget

Widget Properties ✕

Specify the widget properties

* Inquiry Screen:	Cases 🔍
INQUIRY PARAMETERS	
Shared Filter to Apply:	All Records 🔍
FILTER SETTINGS	
Refresh Data:	Every 30 Min ▾
* Pivot Table:	Case Summary 🔍
Caption:	Case Summary

CANCEL FINISH

Figure: Link widget



Access Rights by Screen

You can view and modify the access rights of roles to particular workspaces (that is, to all forms in a workspace), forms, containers of form elements, form elements.

Figure: The correspondence of form boxes with URL parameters

ScreenId=AP402000&VendorID=ALLFRUITS+&ShowAllDocs=True

SweetLife Fruits & Jams
SweetLife Head Office and Wh...

Search... Kimberly Gibbs

Vendor Details

Company/Branch: HEADOFFICE - SweetLife Head ...

* Vendor: ALLFRUITS - All Fruits Mail

Period:

AP Account:

Show All Documents

Include Unreleased Documents

Balance by Documents: 1,139.10

Current Balance: 1,139.10

Prepayment Balance: 0.00

Balance Discrepancy: 0.00

Retained Balance: 0.00

	* Branch	Type	* Reference Nbr.	* Date	* Post Period	Status	Origin. Amount	Balance	Cash Discount Taken
>	HEADOFFICE	Bill	000049	2/20/2021	02-2021	Open	1,139.10	1,139.10	0.00
	HEADOFFICE	Bill	000037	1/30/2021	01-2021	Closed	200.00	0.00	0.00
	HEADOFFICE	Check	000023	1/30/2021	01-2021	Closed	-200.00	0.00	0.00
	HEADOFFICE	Bill	000028	1/22/2021	01-2021	Closed	114.50	0.00	0.00
	HEADOFFICE	Check	000018	1/22/2021	01-2021	Closed	-114.50	0.00	0.00
	HEADOFFICE	Bill	000027	1/15/2021	01-2021	Closed	525.00	0.00	0.00
	HEADOFFICE	Check	000017	1/15/2021	01-2021	Closed	-525.00	0.00	0.00
	HEADOFFICE	Bill	000025	1/8/2021	01-2021	Closed	690.24	0.00	0.00

Your product is in trial mode. Only two concurrent users are allowed. ACTIVATE

Figure: The inspection of a form element

The screenshot displays the SweetLife ERP interface. The browser address bar shows the URL: `ScreenId=AP301000&DocType=INV&RefNbr=000060`. The application header includes the SweetLife logo, a search bar, and the user name Kimberly Gibbs. The main content area shows a 'Bills and Adjustments' form for 'Bill 000060 - All Fruits Mall'. The form includes fields for Type (Bill), Reference Nbr. (000060), Status (On Hold), Date (10/11/2021), Post Period (10-2021), and Vendor (ALLFRUITS - All Fruits Mall). A dialog box titled 'Element Properties' is open, showing details for the selected Vendor field: Control Type (Segment Mask), Data Class (APInvoice), Data Field (VendorID), View Name (Document), and Business Logic (APInvoiceEntry). The dialog box has buttons for CUSTOMIZE, ACTIONS, and CANCEL. The bottom status bar indicates 'Your product is in trial mode. Only two concurrent users are allowed.' and an ACTIVATE button.

Figure: Properties of a link widget

Widget Properties

Specify the widget properties

* Icon:	\$ account balance
* Form:	Vendor Details
Parameters:	VendorID=ALLFRUITS+&ShowAllDocs=1
Description:	Fruit Mall Vendor Details
Caption:	Fruit Mall

CANCEL FINISH

Figure: Embedded page widget

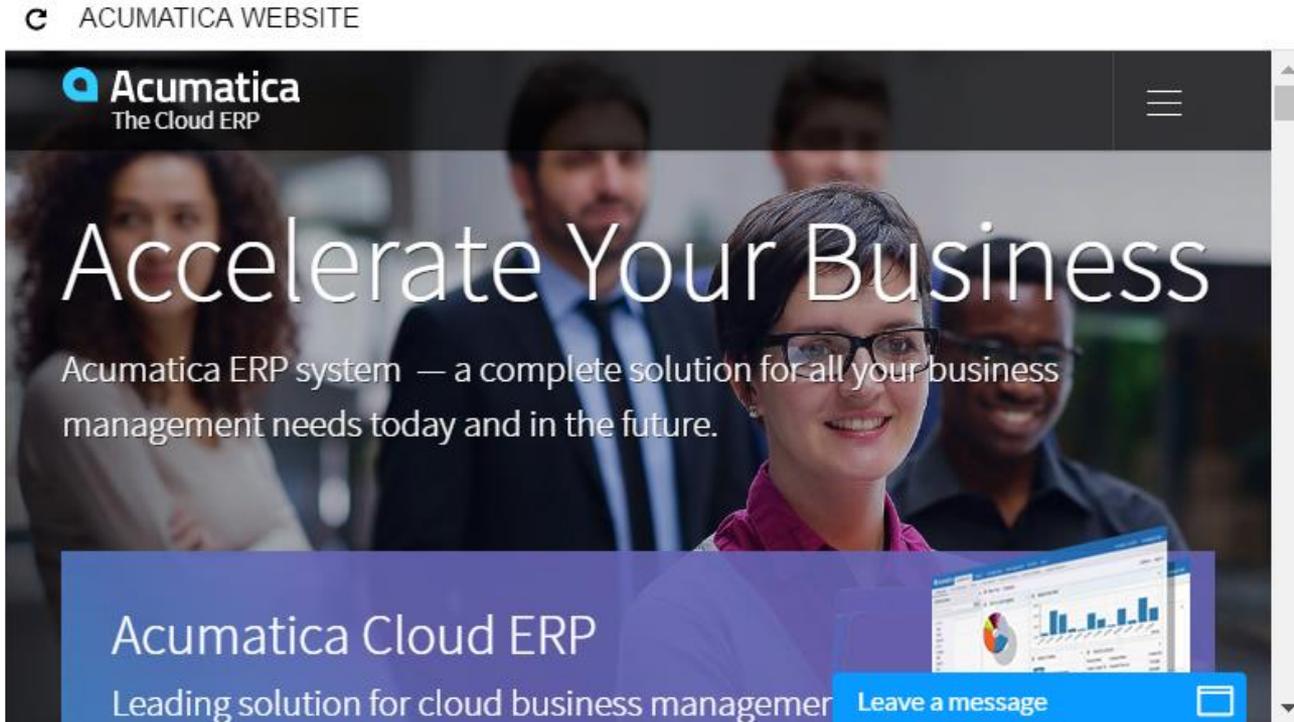


Figure: Properties of an embedded page widget

Widget Properties ✕

Specify the widget properties

* Source:	<input type="text" value="https://openuni.acumatica.com/"/>
Caption:	<input type="text" value="Acumatica Open University"/>

Specific Widgets: To Add Link, Table, and Embedded Page Widgets

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company had previously requested a dashboard named Sales Mgr Dashboard, and you created the requested dashboard form. The sales manager has now requested that you add the following widgets to the dashboard:

- A link to the Customer Details (AR402000) form
- A table that lists customer accounts and has the following columns: **Customer ID**, **Customer Name**, **Country**, **City**, and **Terms**
- An embedded page that displays the website of your company

Figure: SalesMgrDashboard with the three widgets

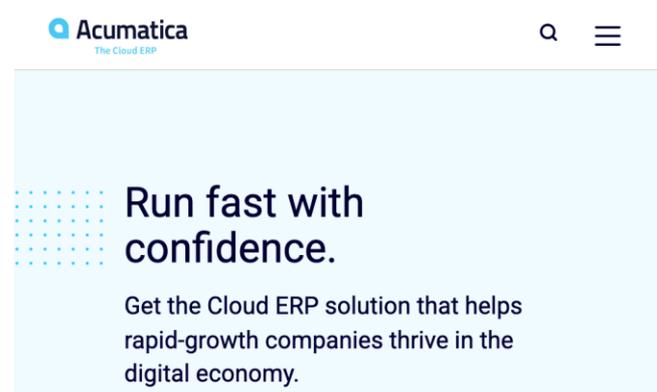
Sales Mgr Dashboard

REFRESH ALL DESIGN TOOLS ▾

Customer Details

You use this form to track outstanding balances for a specific customer.

ACUMATICA WEBSITE



CUSTOMER ACCOUNTS

+

Customer ID	Customer Name	Country	City	Term
ABAKERY	Allen's Bakery	US	New York	30D
CAKEA...	Cakeado Cafe	US	New York	30D
CANDYY	Candy Cafe	US	New York	30D
COFFE...	FourStar Coffee & Swee...	US	New York	30D
DELIEN...	Delicious Energy Restau...	US	New York	30D
EASYDI...	EasyDiner Co.	CA	Atwood	30D
ECOMG...	eCommerce Guest Cust...	US		30D

Lesson 2.3: Configuring KPI Widgets

Figure: The settings of a KPI widget where a user can use data fields of a source inquiry

Widget Properties

Specify the widget properties

* Inquiry Screen:	Unreleased Customer Documents
INQUIRY PARAMETERS	
Shared Filter to Apply:	(Custom)
FILTER SETTINGS	
Refresh Data:	Every 30 Min
* Field to Aggregate:	Reference Nbr.
Aggregate Function:	Count All
Normal Level Type:	Inquiry Field
Normal Level Field:	
Alarm Level Type:	Inquiry Field
Alarm Level Field:	
Normal Color:	Teal
Warning Color:	Yellow
Alarm Color:	Pink
Visualization Type:	Scorecard
Icon:	
Caption:	Unreleased Documents in Prior Months

CANCEL FINISH

Figure: Range placement if the Normal Level value is positive and less than the Alarm Level value

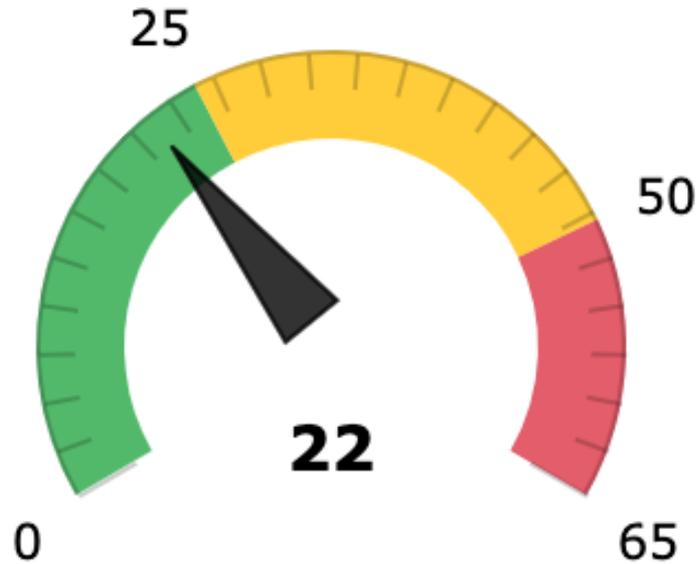


Figure: Range placement if the Normal Level value is negative and less than the Alarm Level value

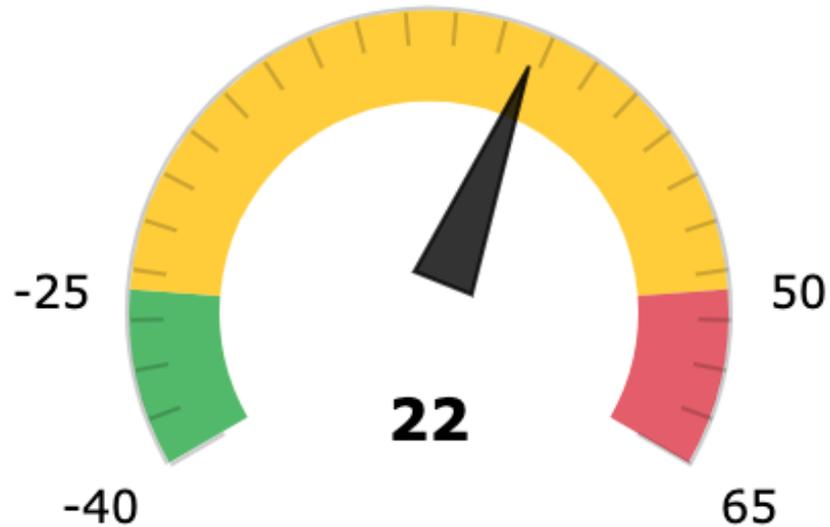


Figure: Range placement if the Alarm Level value is less than the Normal Level value

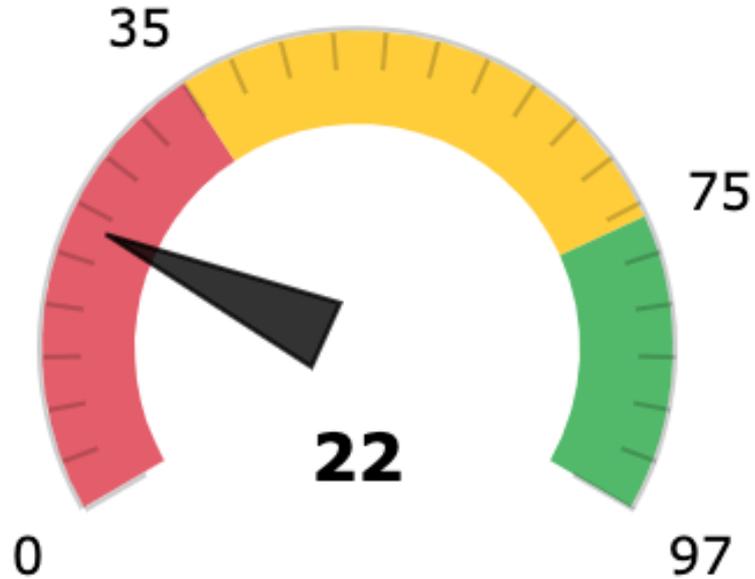


Figure: Scorecard KPI widget

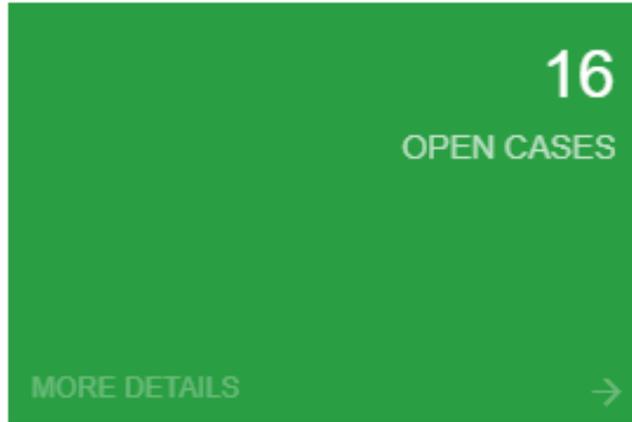


Figure: Properties of a scorecard widget

Widget Properties

Specify the widget properties

* Inquiry Screen:	DB Opportunities
INQUIRY PARAMETERS	
Shared Filter to Apply:	All Records
FILTER SETTINGS	
Refresh Data:	Every 12 Hours
* Field to Aggregate:	Opportunity ID
Aggregate Function:	Count All
Normal Level Type:	Absolute Value
Normal Level:	0
Alarm Level Type:	Absolute Value
Alarm Level:	0
Normal Color:	Info
Warning Color:	Info
Alarm Color:	Info
Visualization Type:	Scorecard
Icon:	people
Caption:	Open Opportunities

CANCEL FINISH

Figure: Meter KPI widget

YTD SALES 🔄 Updated a moment ago

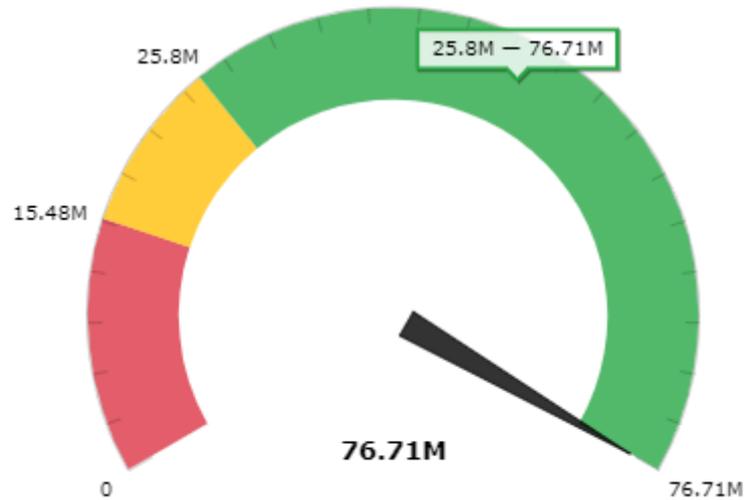


Figure: Trend card widget

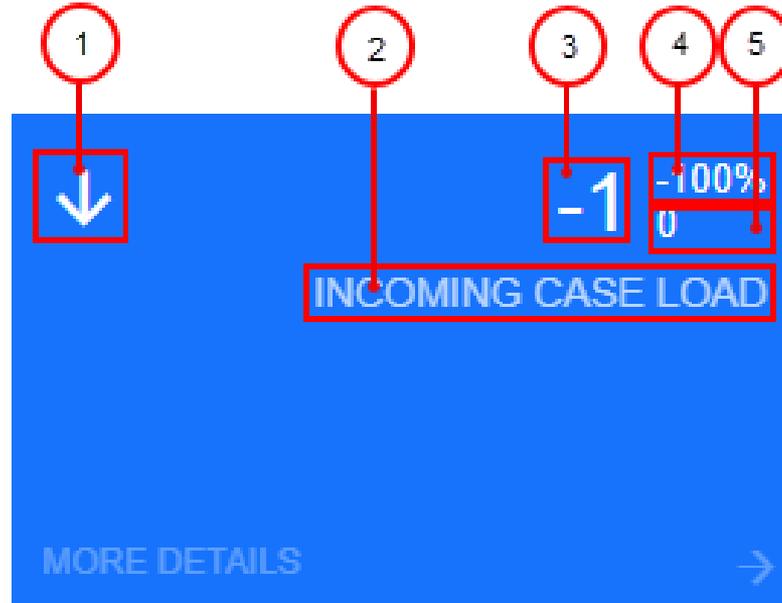


Figure: Properties of a trend card widget

Widget Properties

Specify the widget properties

* Inquiry Screen:

Shared Filter to Apply:

Refresh Data:

* Field to Aggregate:

Aggregate Function:

Timeline Field:

Period:

Rising Trend Color:

Flat Trend Color:

Falling Trend Color:

Caption:

CANCEL PREV FINISH

Specific Widgets: To Add KPI Widgets

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company had previously requested a dashboard named Sales Mgr Dashboard. You had created the requested dashboard form. The sales manager has now requested that you add the following widgets to the dashboard to track the described KPIs:

- Profitability Trend: The trend for the cumulative margin percentage in comparison to the previous week
- Number of Customers: The current number of customers (which is 22 at the moment) in comparison with the department goal to have at least 45 customers by the end of the next quarter
- Orders to Ship: The current number of sales orders ready to ship, which should not exceed 50 percent of the number the department defines as a high load (40 open orders at a time)

Also, the new KPI widgets should be located in the upper left corner of the dashboard, and the Orders to Ship widget should be separated from the upper widgets, which have the Sales Orders header.

Figure: The dashboard with the changed layout and rearranged widgets

Sales Mgr Dashboard

+ Add a new widget

📄 Paste from clipboard

🖱️ Drag your widget here

PROPERTIES EDIT LAYOUT REFRESH ALL DESIGN TOOLS ▾

Customer Details

You use this form to track outstanding balances for a specific customer.

CUSTOMER ACCOUNTS

Customer ID	Customer Name	Country	City	Term
ABAKERY	Allen's Bakery	US	New York	30D
CAKEA...	Cakeado Cafe	US	New York	30D
CANDYY	Candy Cafe	US	New York	30D
COFFE...	FourStar Coffee & Swee...	US	New York	30D
DELIEN...	Delicious Energy Resta...	US	New York	30D

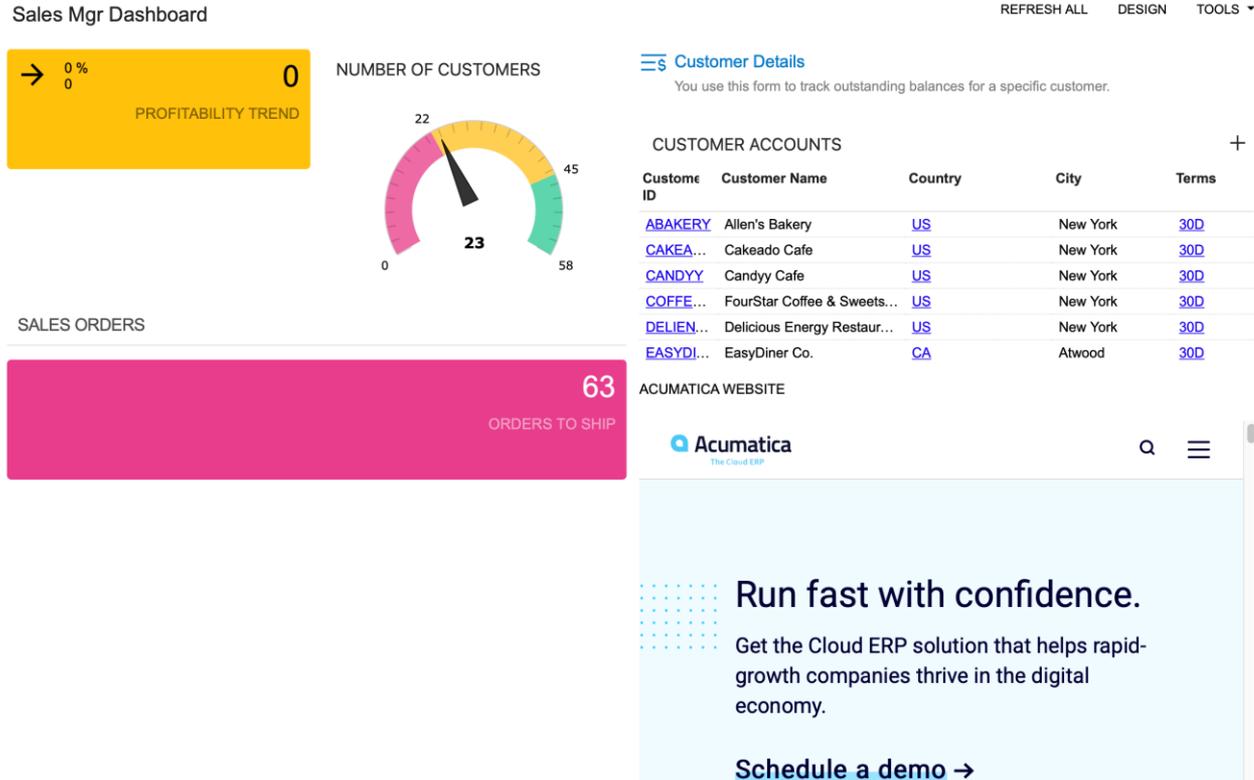
ACUMATICA WEBSITE

 Acumatica
The Cloud ERP

Run fast with confidence.

Get the Cloud ERP solution that helps rapid-growth companies thrive in the digital economy.

Figure: The Sales Mgr Dashboard with the changed layout and additional widgets



Day 3

Lesson 2.4: Configuring Chart Widgets

Figure: Specification of a data source for a chart widget

Widget Properties ×

Specify the widget properties

* Inquiry Screen: 🔍

INQUIRY PARAMETERS

Shared Filter to Apply: 🔍

FILTER SETTINGS

Refresh Data: ▾

CONFIGURE

Caption:

CANCEL **FINISH**

Figure: Selection of a chart type

The image shows a 'Chart Settings' dialog box with a red border around the 'Chart Type' dropdown menu. The dropdown is open, showing four options: 'Line', 'Column', 'Stacked Column', and 'Bar'. The 'Column' option is highlighted with a blue background. The dialog box also contains other settings such as 'Legend Position', 'Legend', 'Sort By', 'Maximum Number of Values Shown', 'Color', and 'Value'.

Chart Settings [Close]

* Chart Type: **Column**

Legend Position:

CATEGORIES

* Legend:

Sort By: Descendi... ▾

Maximum Number of Values Shown:

SERIES

Legend:

Sort By: Descendi... ▾

Maximum Number of Values Shown: 10 Show Sum of Other Entries

Color: [Search]

VALUES

* Value: Opportunity ID ▾ Count All ▾

OK

Figure: Sample configuration of column chart widget

Chart Settings

* Chart Type: Column

Legend Position: Left

CATEGORIES

* Legend: Contact

Sort By: Legend Values Descendi...

Maximum Number of Values Shown: Show Sum of Other Entries

SERIES

Legend: Status

Sort By: Legend Values Descendi...

Maximum Number of Values Shown: Show Sum of Other Entries

Color:

VALUES

* Value: Opportunity ID Count All

OK

Figure: A column chart with series

OPPORTUNITY DISTRIBUTION AND STATUS

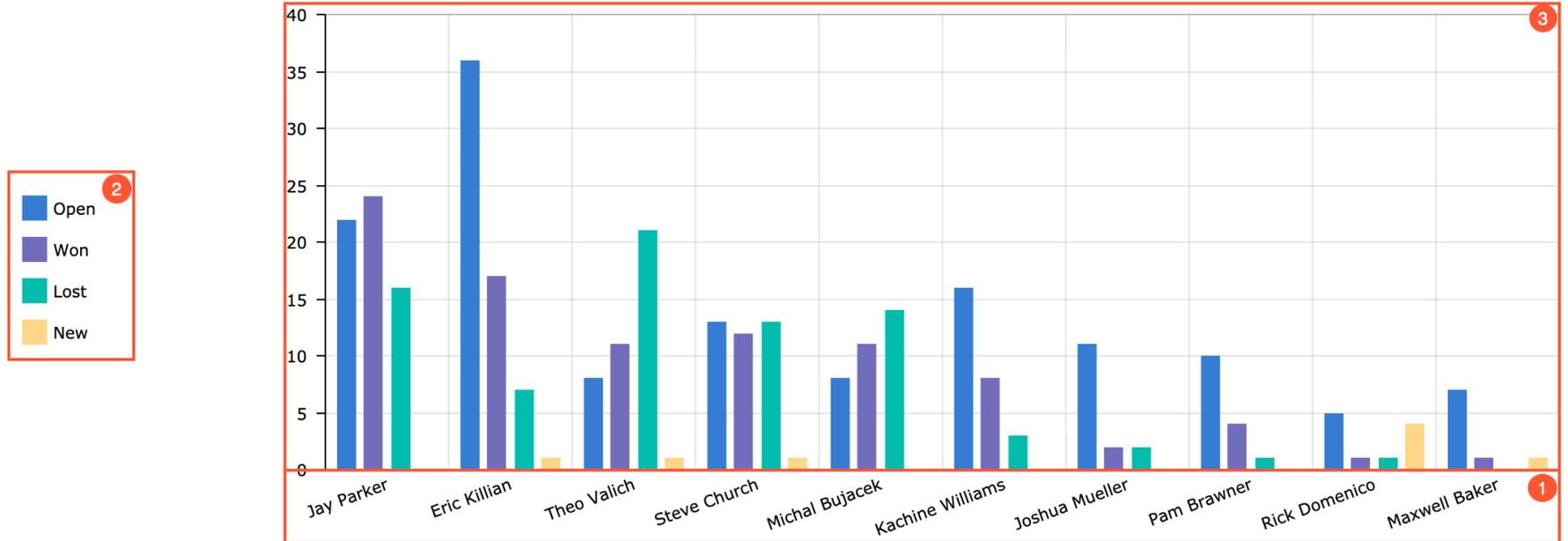


Figure: Line chart with multiple lines

SALES BY QUARTERS

Updated a moment ago

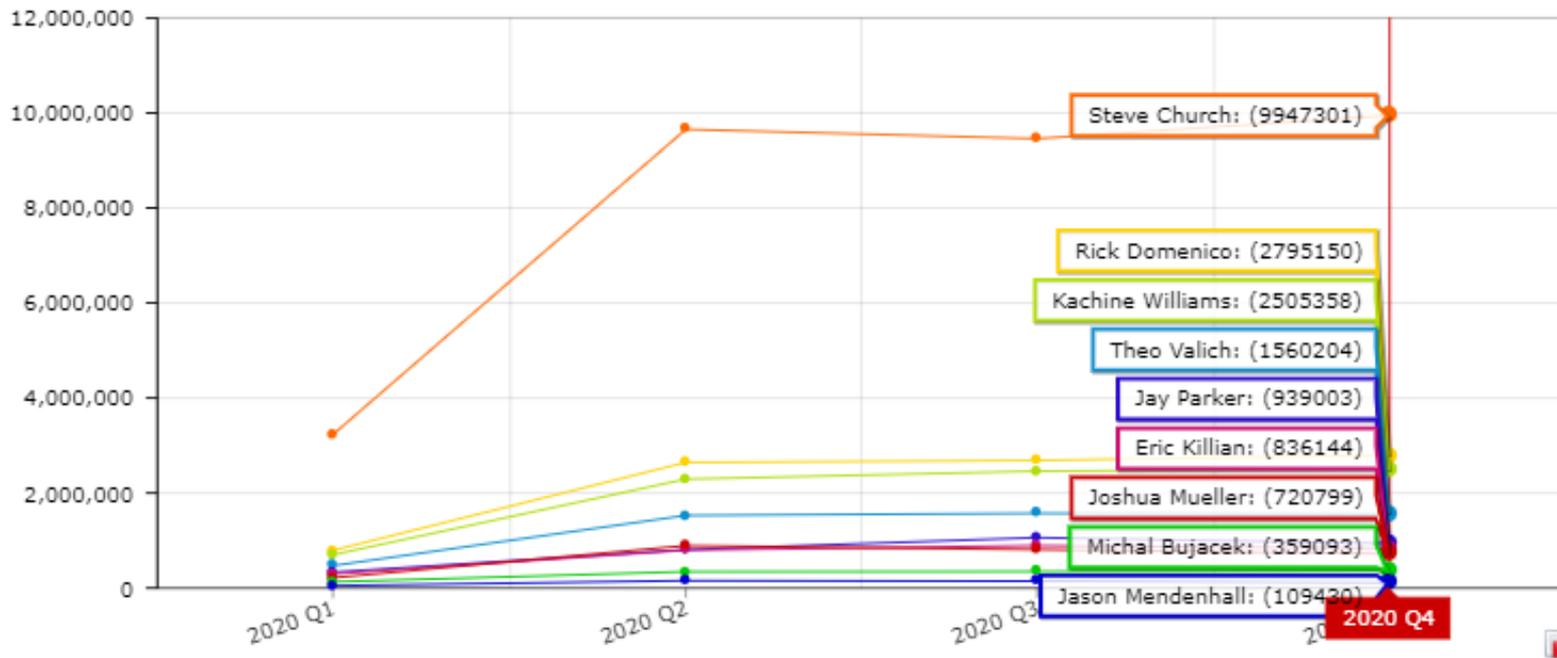


Figure: Column chart

MY TEAM'S SALES BOOKINGS

Updated a moment ago

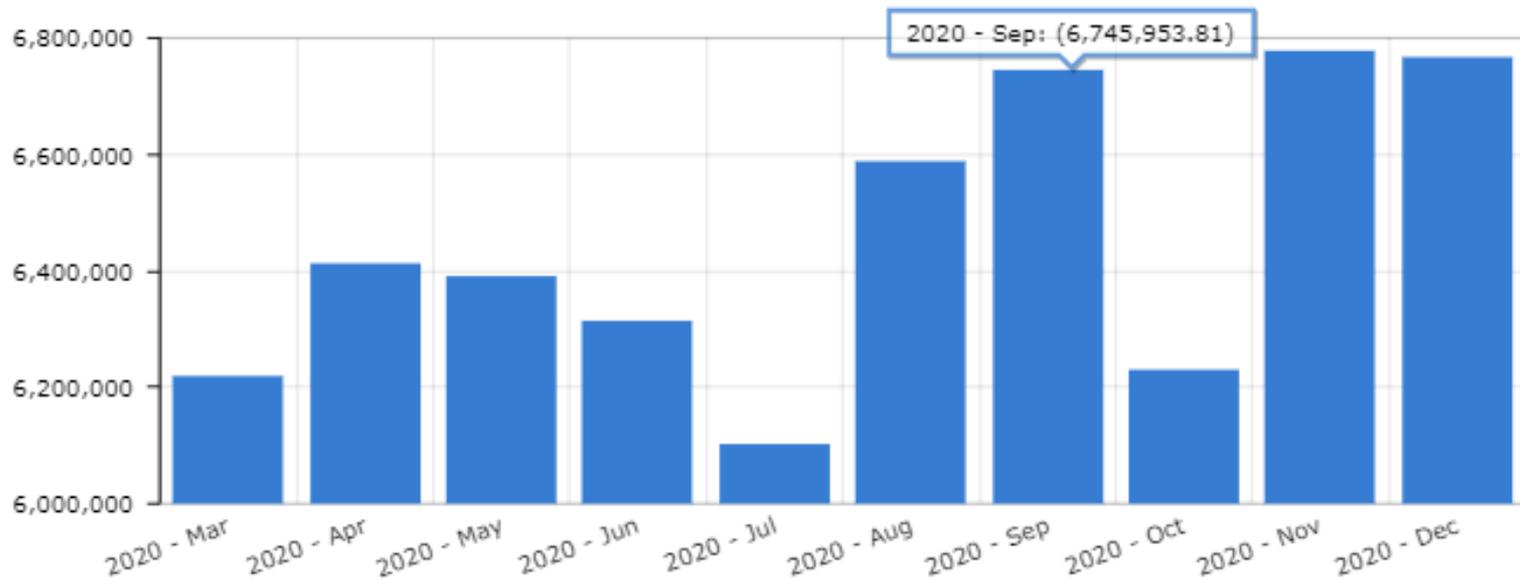
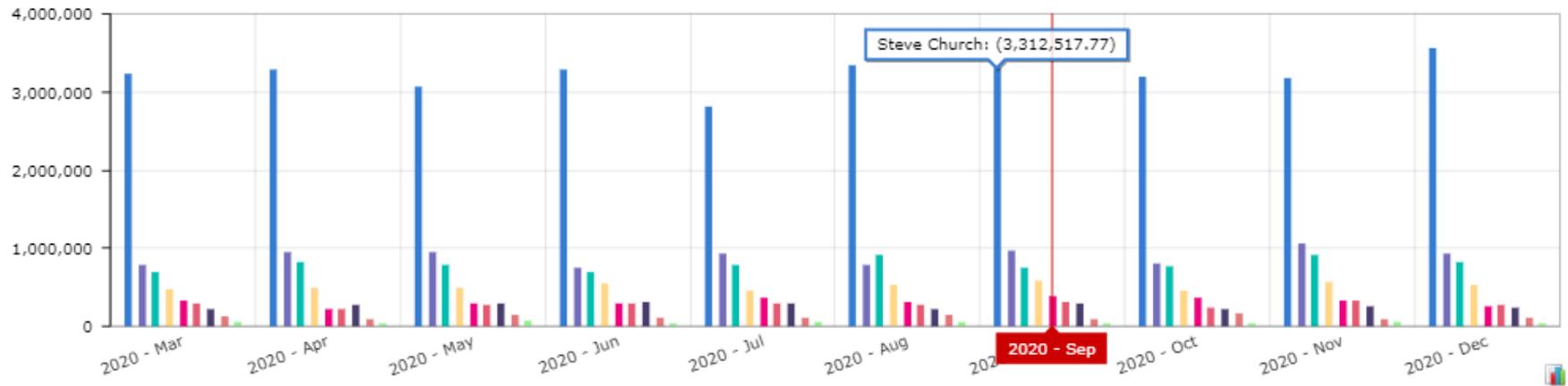


Figure: Column chart with series

MY TEAM'S SALES BOOKINGS

Updated a moment ago



KEY CUSTOMER GROWTH

Figure: Bar chart

MY TEAM'S SALES BOOKINGS Updated a moment ago

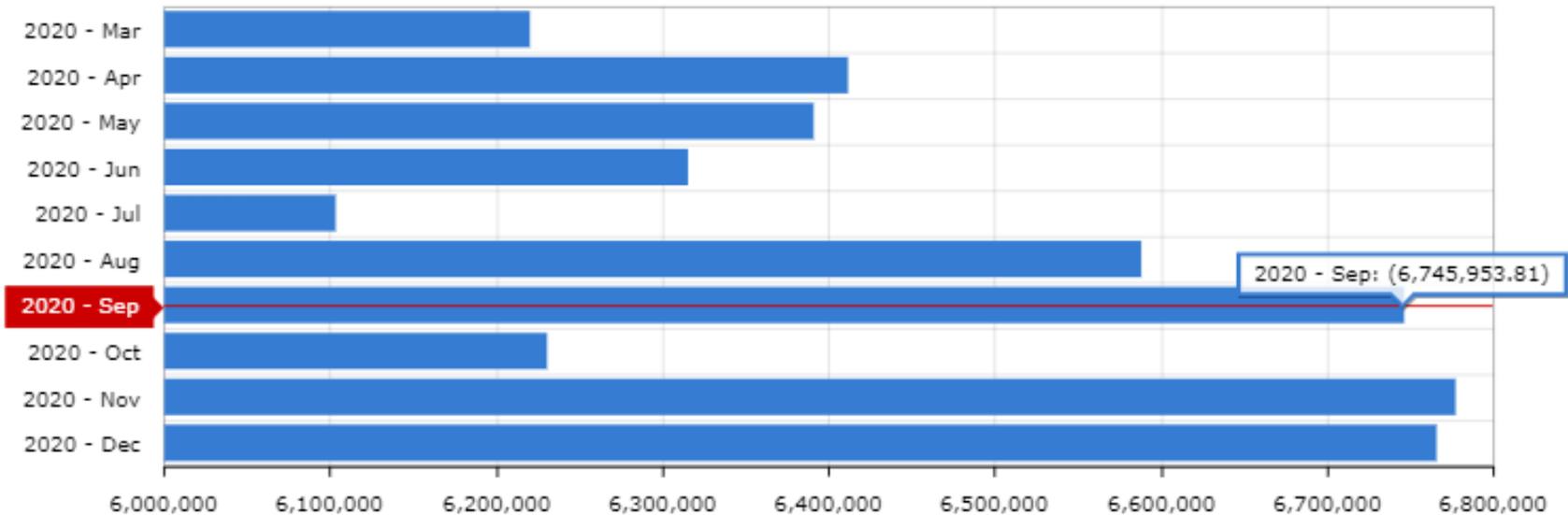


Figure: Bar chart with series

MY TEAM'S SALES BOOKINGS

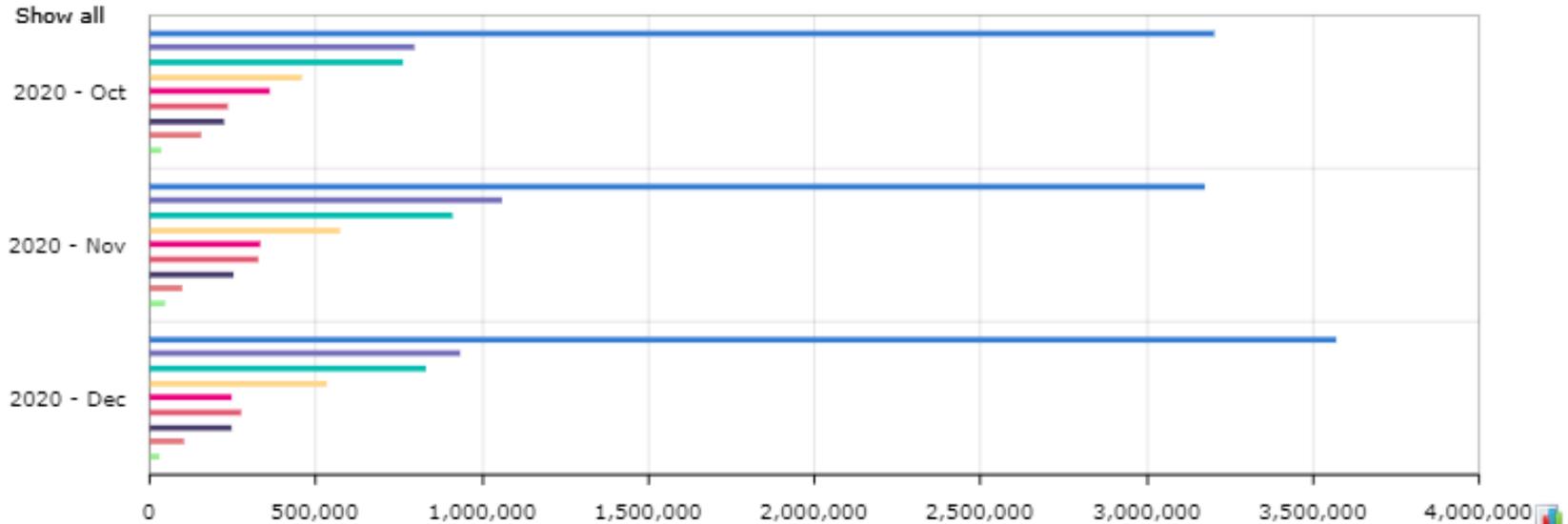


Figure: Stacked column chart

MY TEAM'S SALES BOOKINGS Updated a moment ago

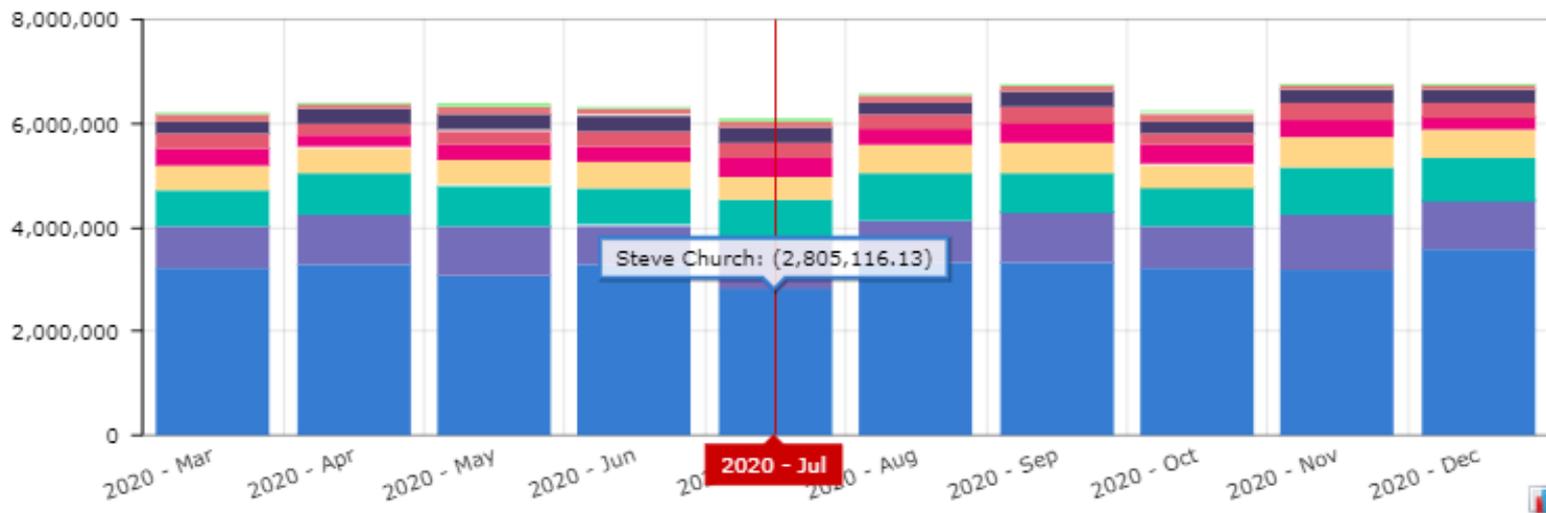


Figure: Stacked bar chart

MY TEAM'S SALES BOOKINGS 🔄 Updated a moment ago

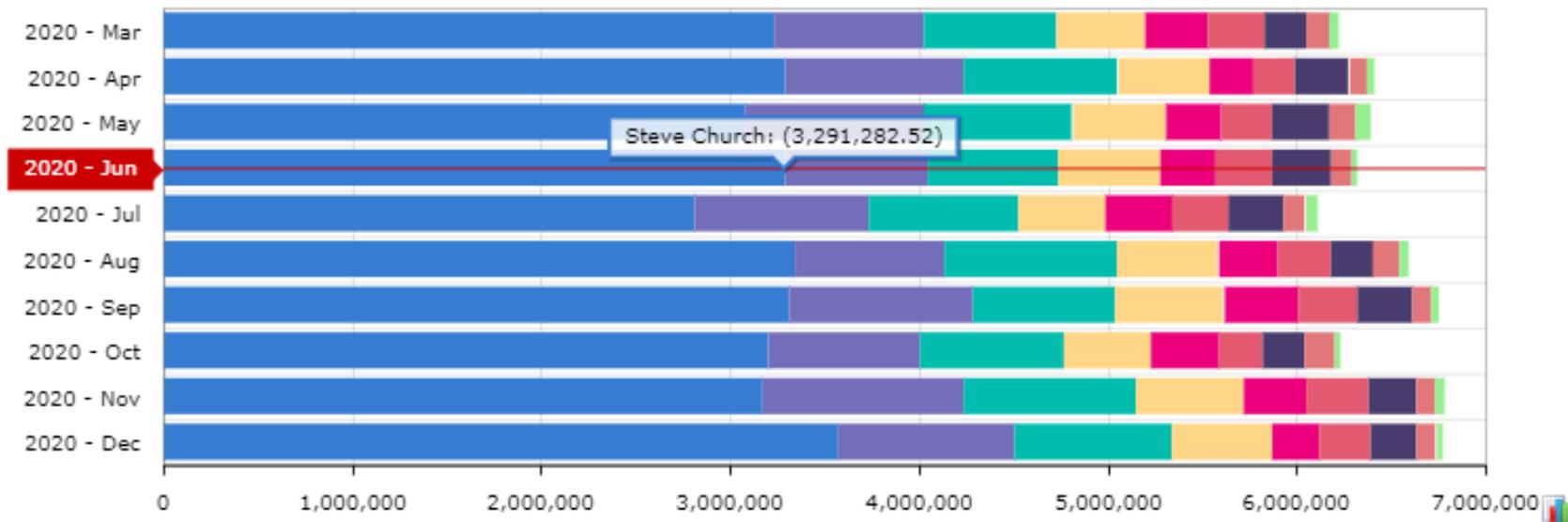


Figure: Doughnut chart

SUPPORT HOURS BY EMPLOYEES

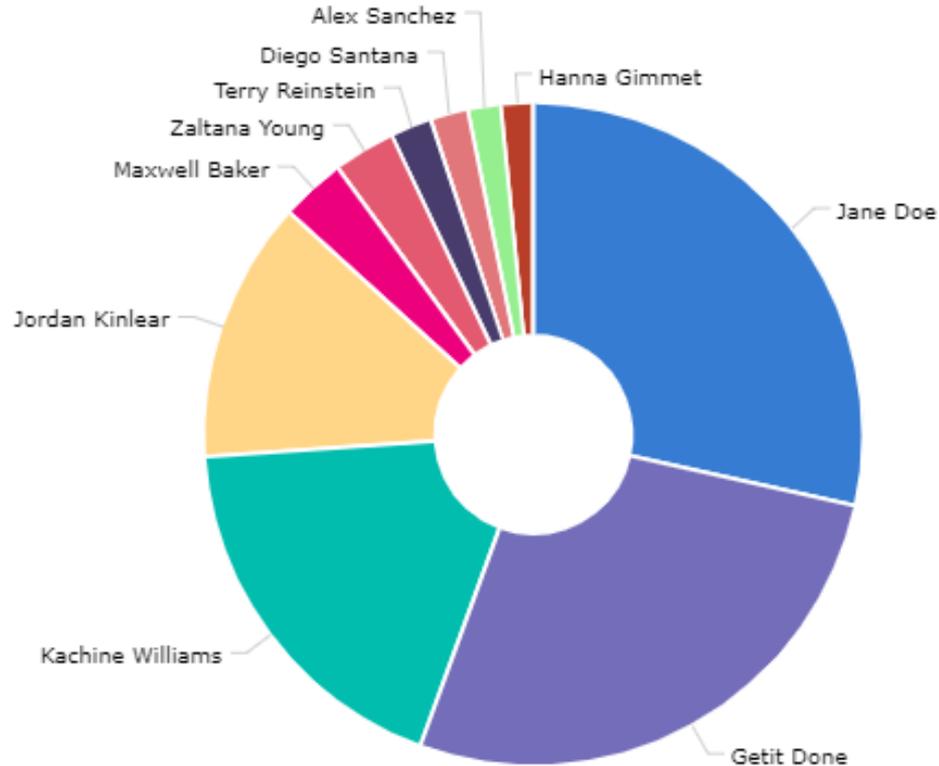
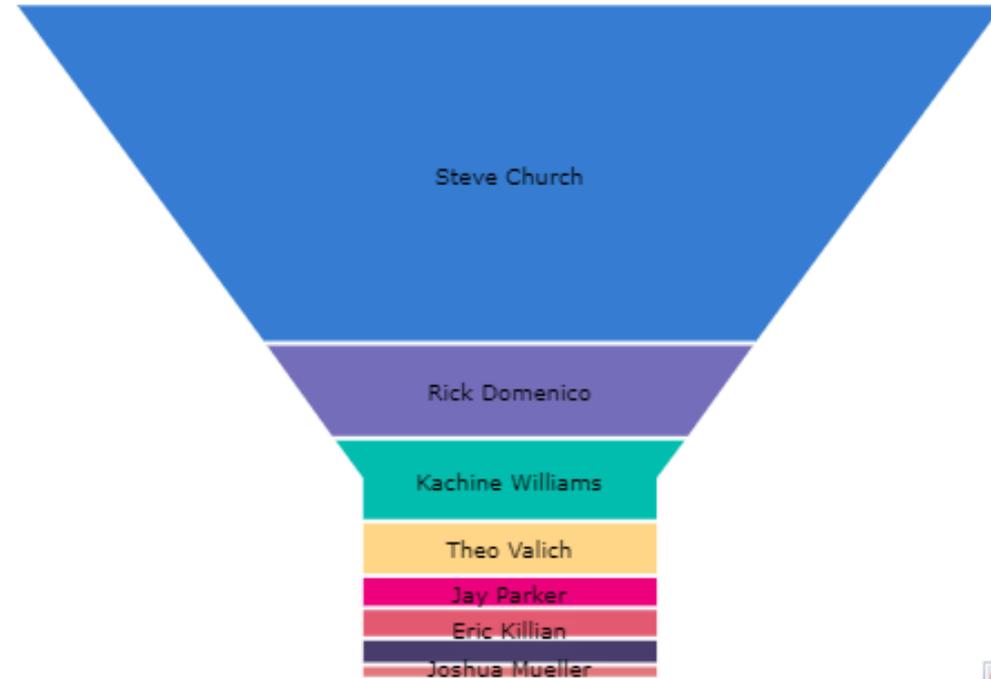


Figure: Funnel chart

MY TEAM'S SALES BOOKINGS



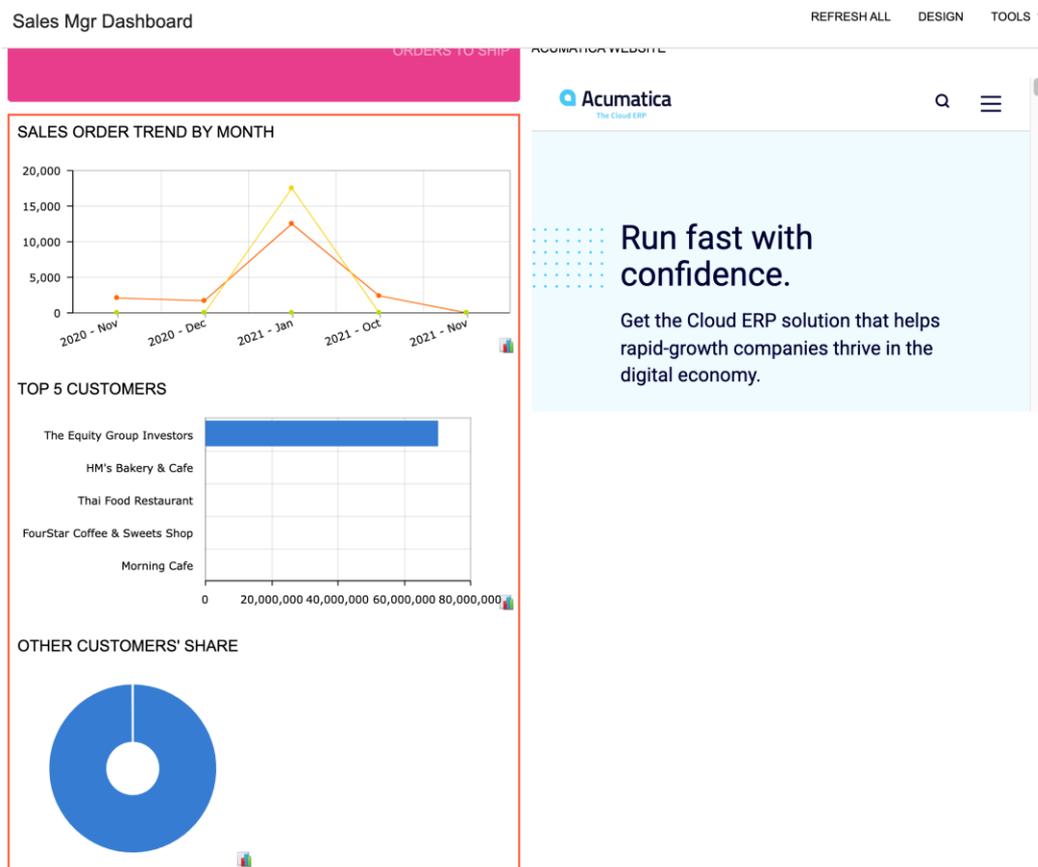
Specific Widgets: To Add Chart Widgets

Story

Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company had previously requested a dashboard named *Sales Mgr Dashboard*, and you created the requested dashboard form. The sales manager has now requested that you add the following widgets to present the listed data:

- *Sales Order Trend by Month*: The total amount of the sales orders by month
- *Top 5 Customers*: The top five customers by invoiced amount
- *Other Customers' Share*: The share (of the total invoiced amounts) of the sum of the invoiced amounts of customers that are not in the top five list in comparison with the top five customers

Figure: The Sales Mgr Dashboard with the three chart widgets



Lesson 2.5: Filtering Widget Data

Figure: Modification of values for the source inquiry parameters

Widget Properties

Specify the widget properties

* Inquiry Screen: Account Details for Period

INQUIRY PARAMETERS

Inquiry Parameters

Parameter	Value	Use Default Value
> From Period	06-2021	<input checked="" type="checkbox"/>
To Period	06-2021	<input checked="" type="checkbox"/>
Ledger	ACTUAL	<input checked="" type="checkbox"/>
Include Unposted	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Include Unreleased	<input type="checkbox"/>	<input checked="" type="checkbox"/>

CANCEL OK

CANCEL PREV FINISH

Figure: Selection of a shared filter for a widget

The screenshot shows the 'Widget Properties' dialog box with the following fields and options:

- * Inquiry Screen:** DB Opportunities
- Shared Filter to Apply:** All Records
- Refresh Data:** Every 30 Min
- Caption:** Opportunity Distribution and Status

The 'Shared Filter to Apply' dropdown is open, showing a list of filters:

- All Records
- Closing in 60 Days (highlighted)
- Closing in 60 Days (me)
- Lost
- No Activity 30 days

The dialog box also includes buttons for 'FILTER SETTINGS', 'CONFIGURE', 'CANCEL', and 'FINISH'.

Figure: Specification of filtering conditions that are specific to the widget

Widget Properties ✕

Specify the widget properties

* Inquiry Screen: 🔍

Shared Filter to Apply: 🔍

Refresh Data:

Filter Settings ✕

	Activ	Bra	* Data Field	* Condition	Use Para	Valt 1	Valt 2	Bra	Opera
↶	<input checked="" type="checkbox"/>		Status	Equals	<input type="checkbox"/>	<input type="text" value=""/>			And

Figure: Specification of a dashboard parameter in a widget-specific filter

Widget Properties ✕

Specify the widget properties

* Inquiry Screen: 🔍

Shared Filter to Apply: 🔍

Filter Settings ✕

+ ✕

Active	Brack	* Data Field	* Condition	Use Param	Value 1	Value 2	Brack	Operator
<input checked="" type="checkbox"/>		Owner	Is Empty	<input type="checkbox"/>				And
<input checked="" type="checkbox"/>		Status	Does Not Equal	<input type="checkbox"/>	Won			And
<input checked="" type="checkbox"/>		Status	Does Not Equal	<input type="checkbox"/>	Lost			And
<input checked="" type="checkbox"/>		Owner	Equals	<input checked="" type="checkbox"/>	Sales Rep			And

Icon: ▼

Caption:

Specific Widgets: To Filter Widget Data

Story

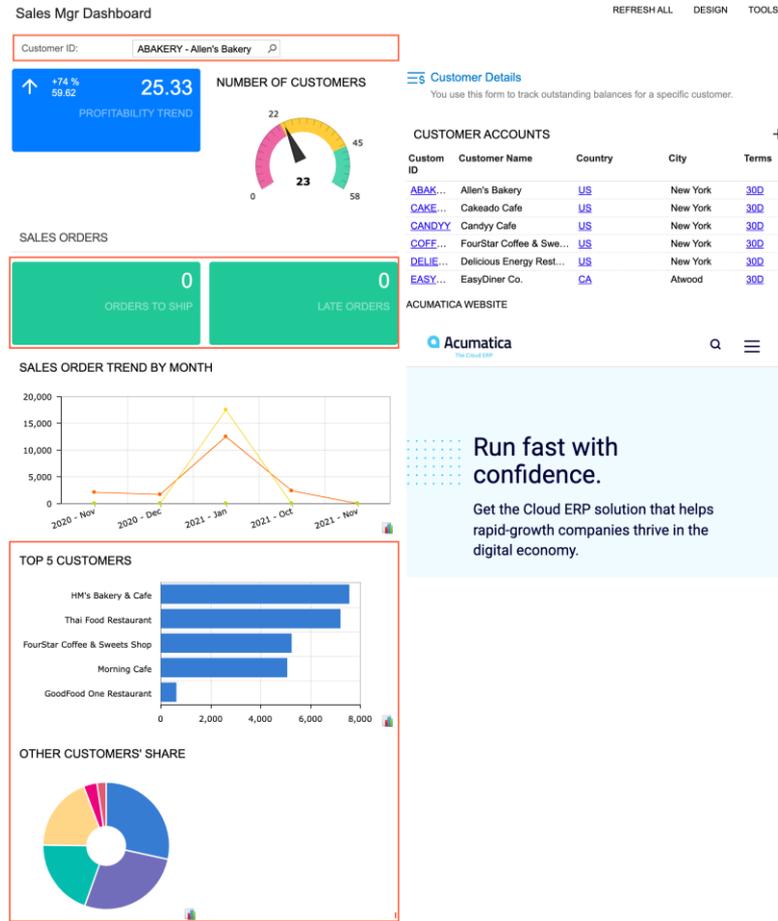
Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company had previously requested a dashboard named Sales Mgr Dashboard, and you created the requested dashboard form. After that, the sales manager requested that you add multiple widgets that track different KPIs and trends, and you added the needed widgets.

The sales manager has assessed the data displayed by the widgets and found the following issues:

- The Orders to Ship widget currently counts all orders, regardless of their status, but should count only orders with the Open status.
- The Top 5 Customers and Other Customers' Share widgets include The Equity Group Investors account, which is tracked by a another department and should be excluded.

Also, the sales manager has asked you to add one more scorecard with the number of orders whose requested date is earlier than today—Late Orders. Finally, the manager has requested that you add a dashboard parameter to make it possible for the data of the Orders to Ship and Late Orders widgets to be filtered by customer (that is, showing only the data of the selected customer if the user makes a selection).

Figure: The Sales Mgr Dashboard with the widget data filtered



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Thank you

Benjamin Crisman