

Dashboard and Widget Design

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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

A technician wearing a green t-shirt with the 'xByte' logo is working on server hardware in a data center. He is using a power drill to work on a server unit. The background is filled with server racks and numerous black cables hanging down. A semi-transparent white banner is overlaid across the middle of the image.

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

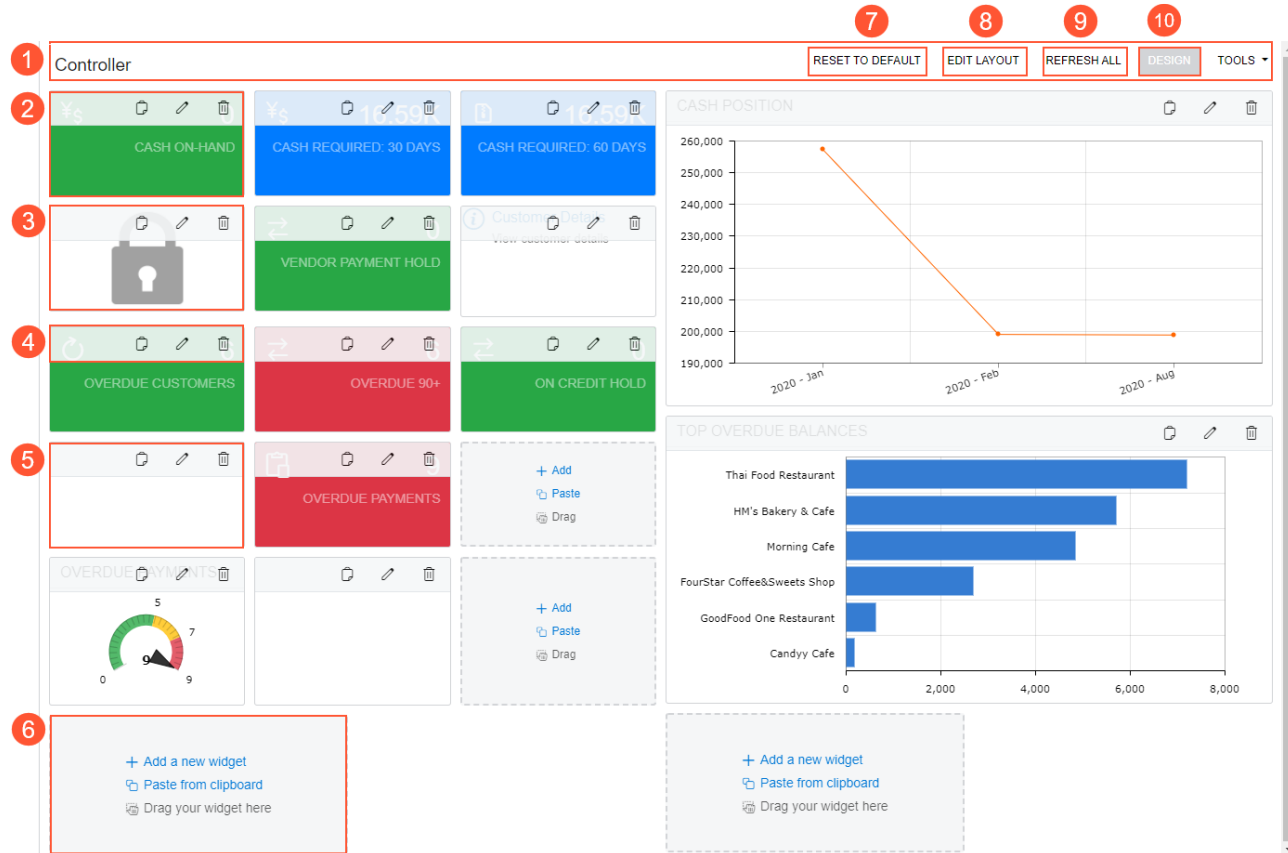


Figure: Selection of a dashboard layout

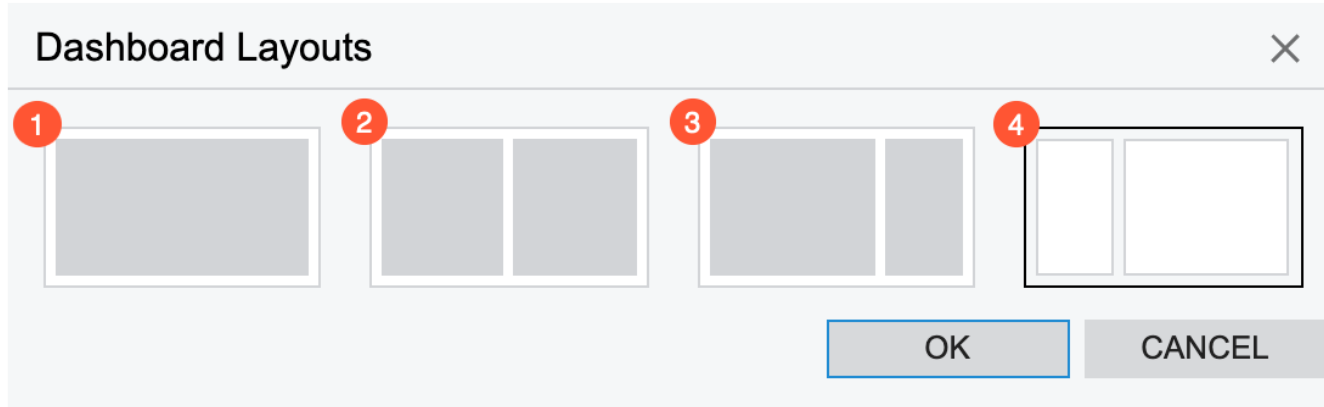


Figure: A dashboard with empty space between working areas

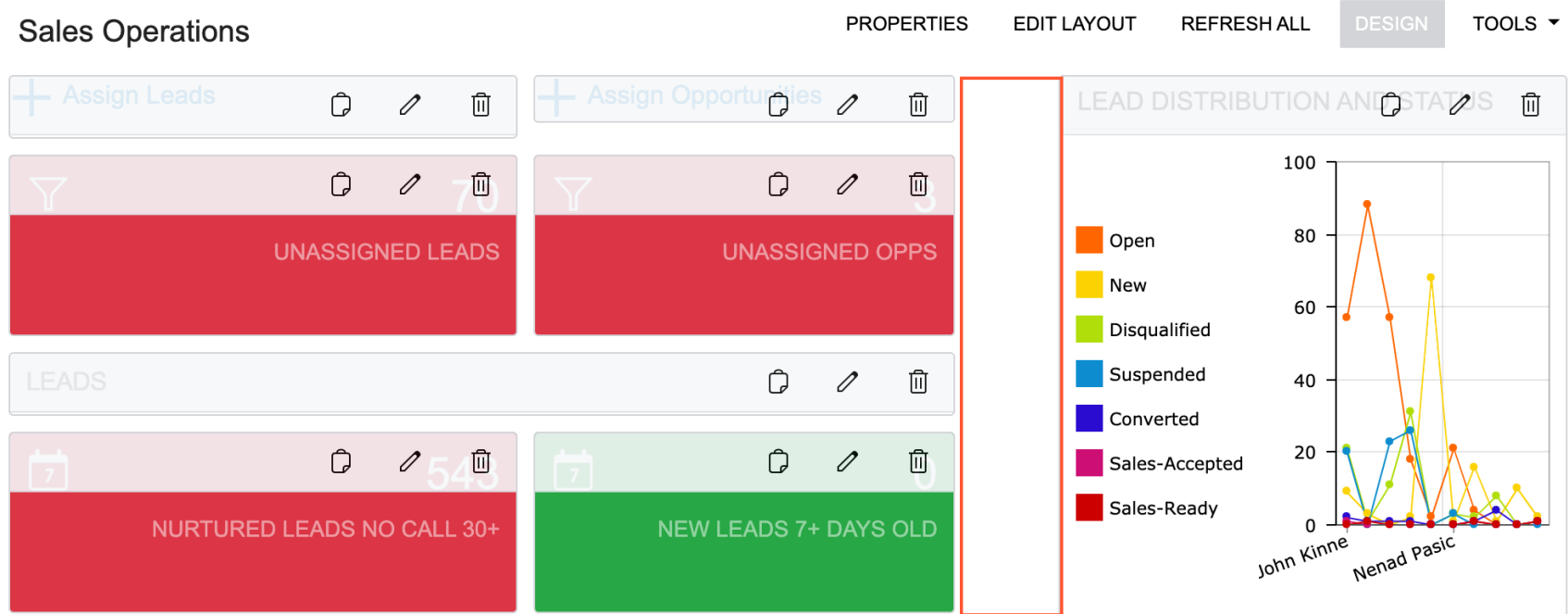


Figure: A dashboard with two rows

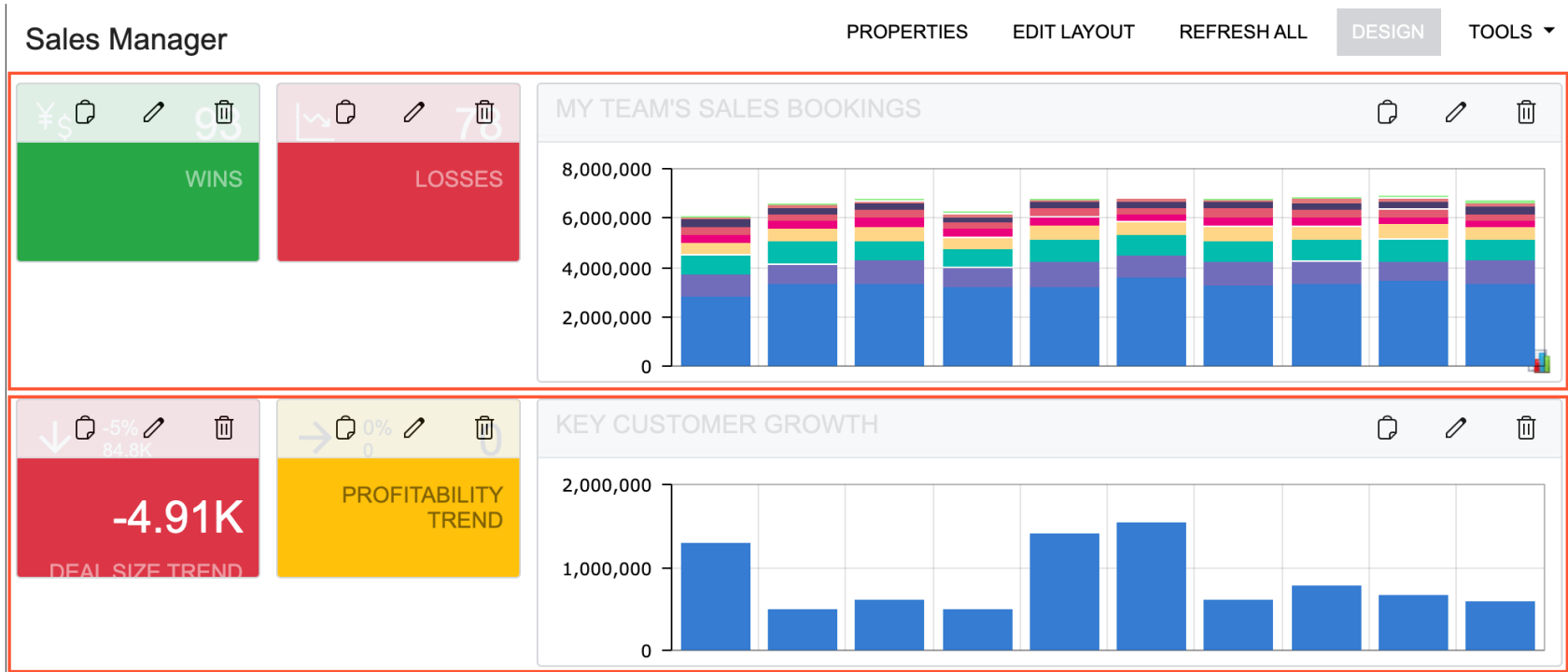


Figure: An embedded page widget to add space

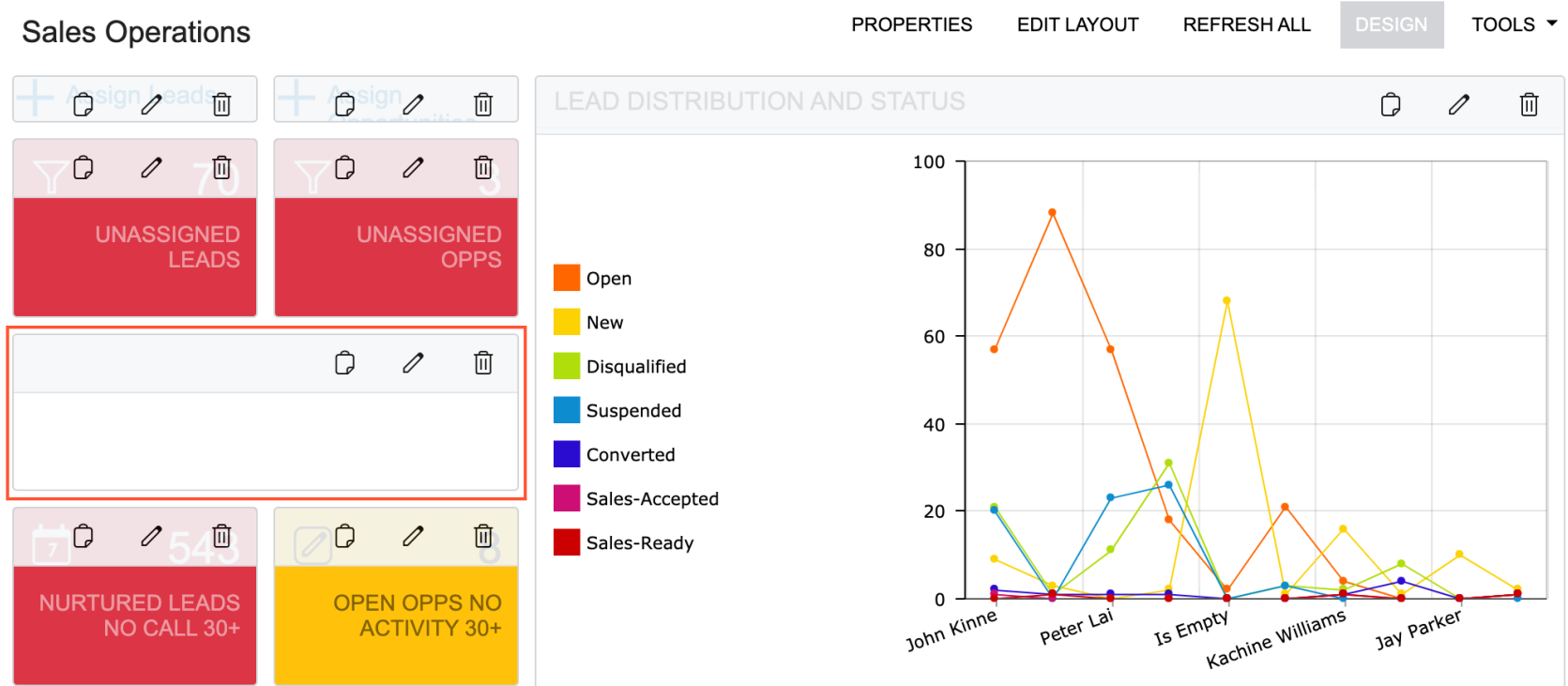


Figure: Clicking of the widget title to drill down

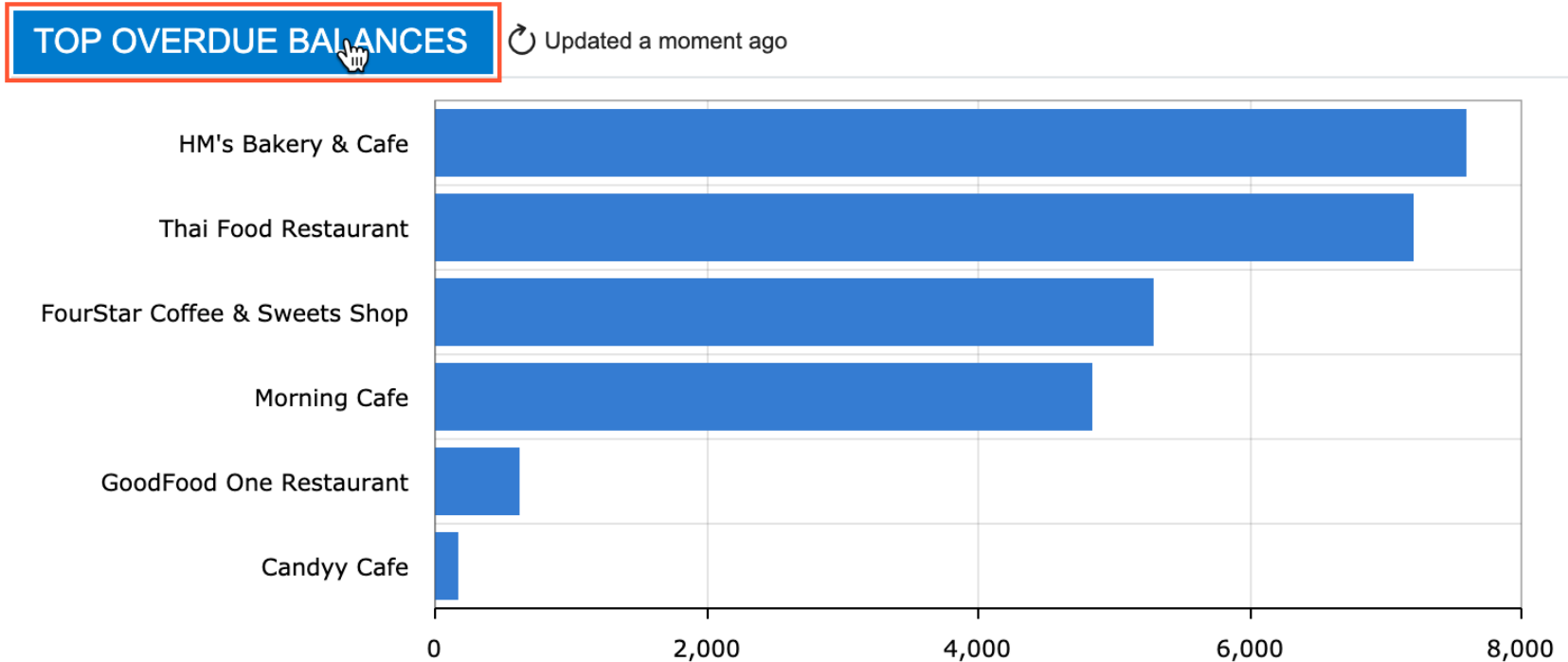


Figure: A chart with an area selected for zooming in

OPPORTUNITY DISTRIBUTION AND STATUS Updated 3 min ago

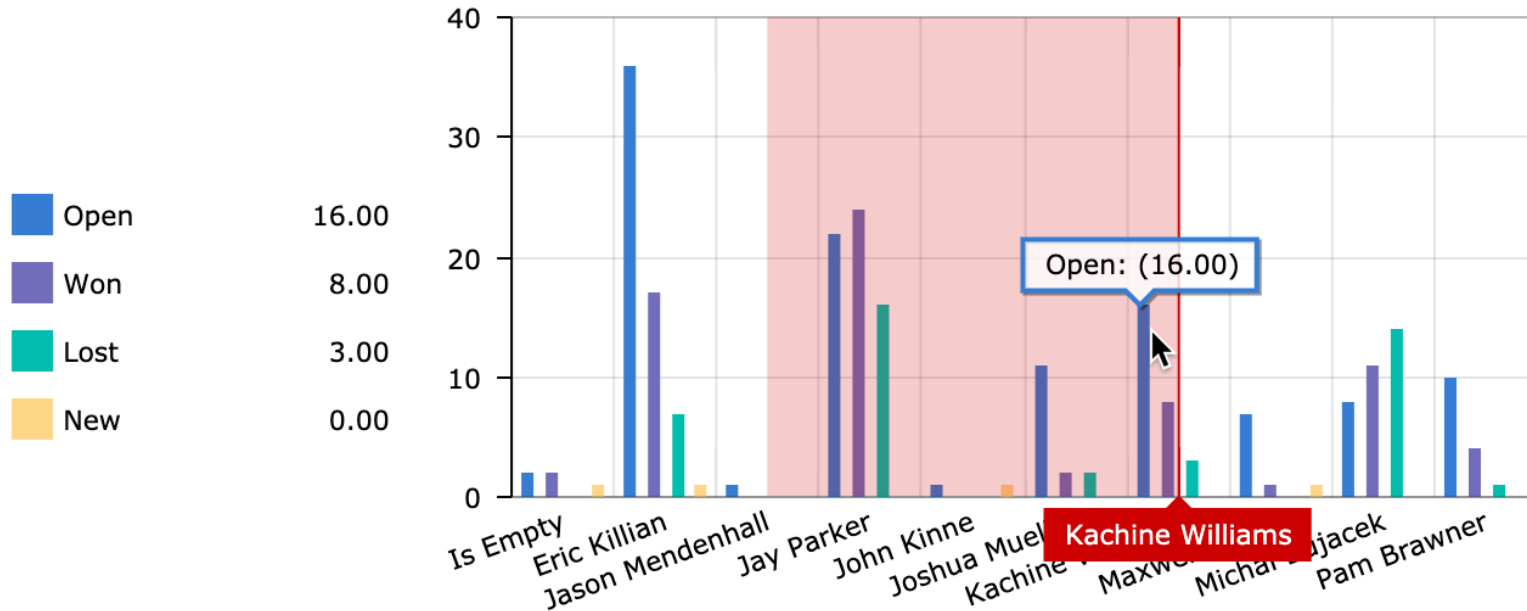


Figure: A chart with the details displayed for a data point

LEAD DISTRIBUTION AND STATUS  Updated 8 min ago

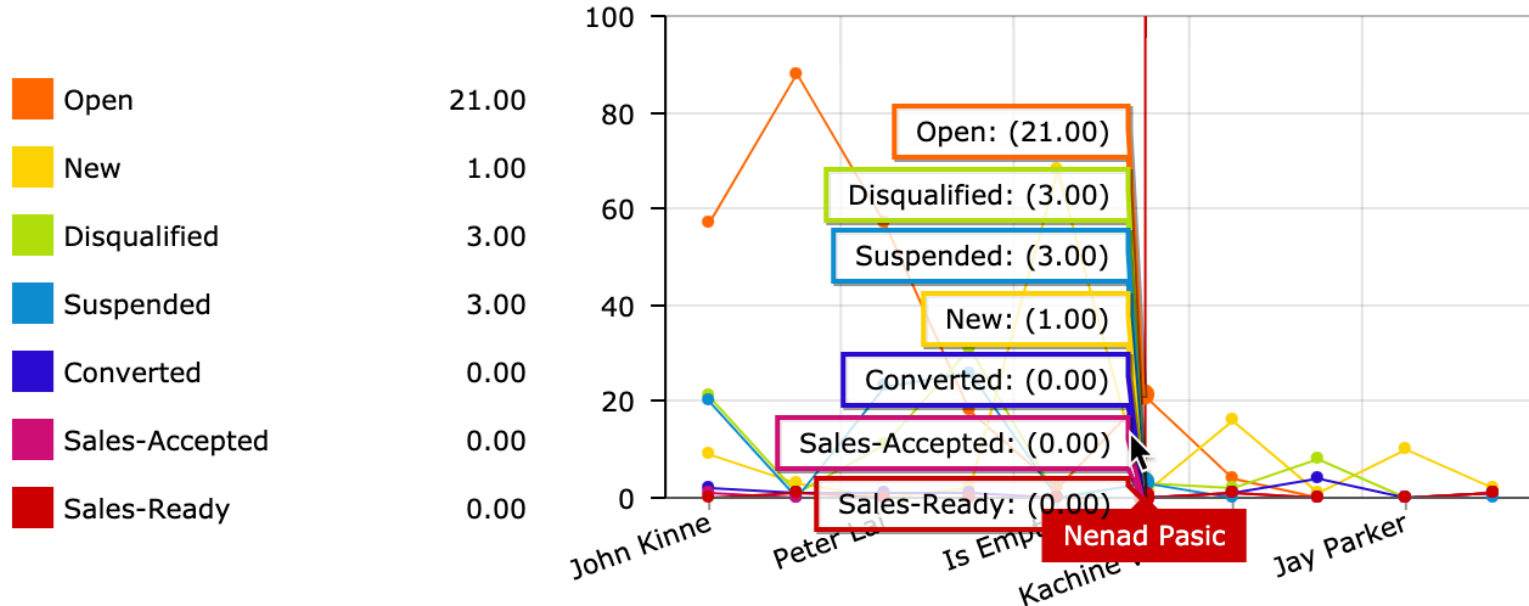


Figure: A chart with the legend icon shown

OPPORTUNITIES GENERATED BY SOURCE

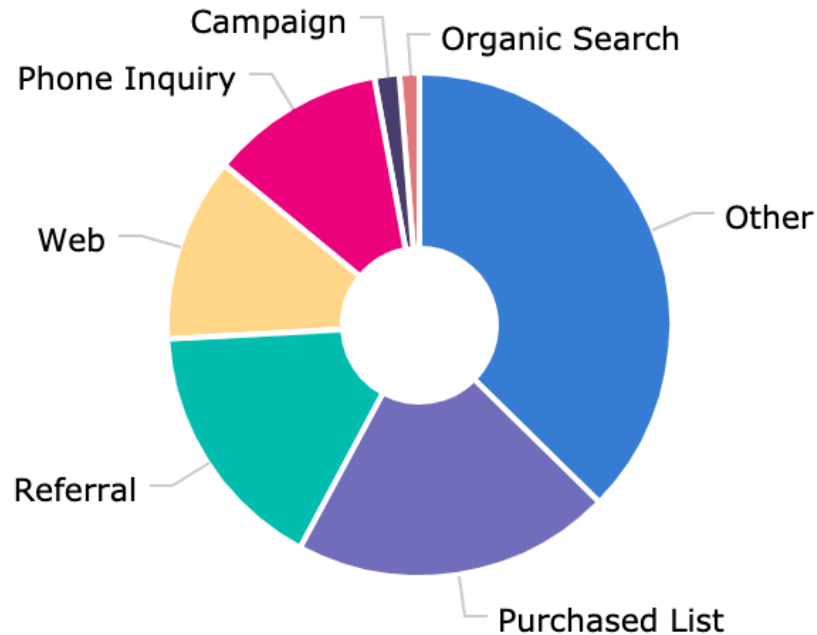
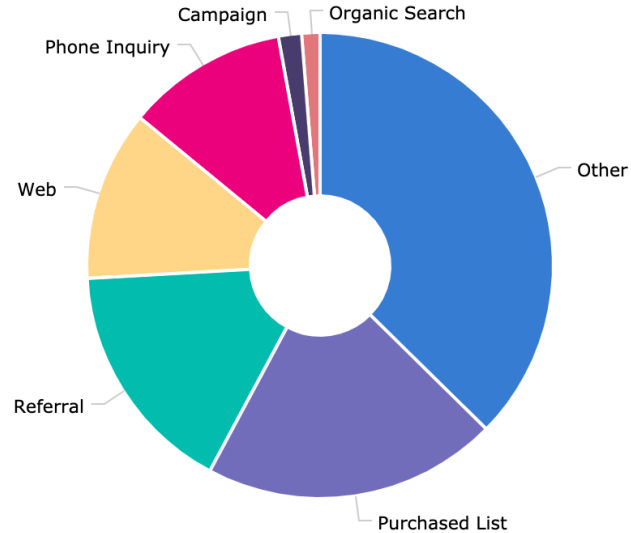


Figure: A chart with data excluded

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

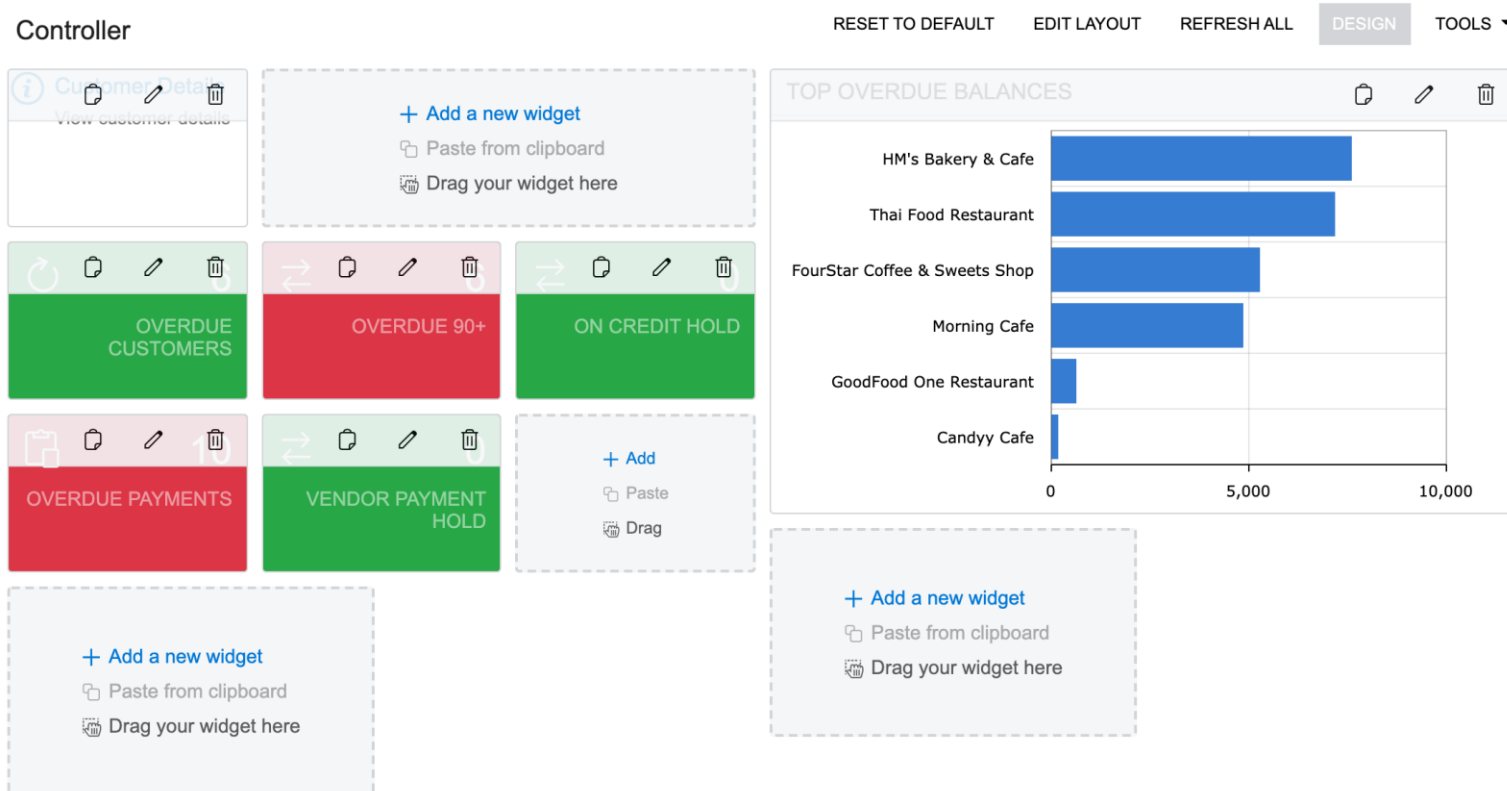


Figure: The dashboard layout with the wider left working area

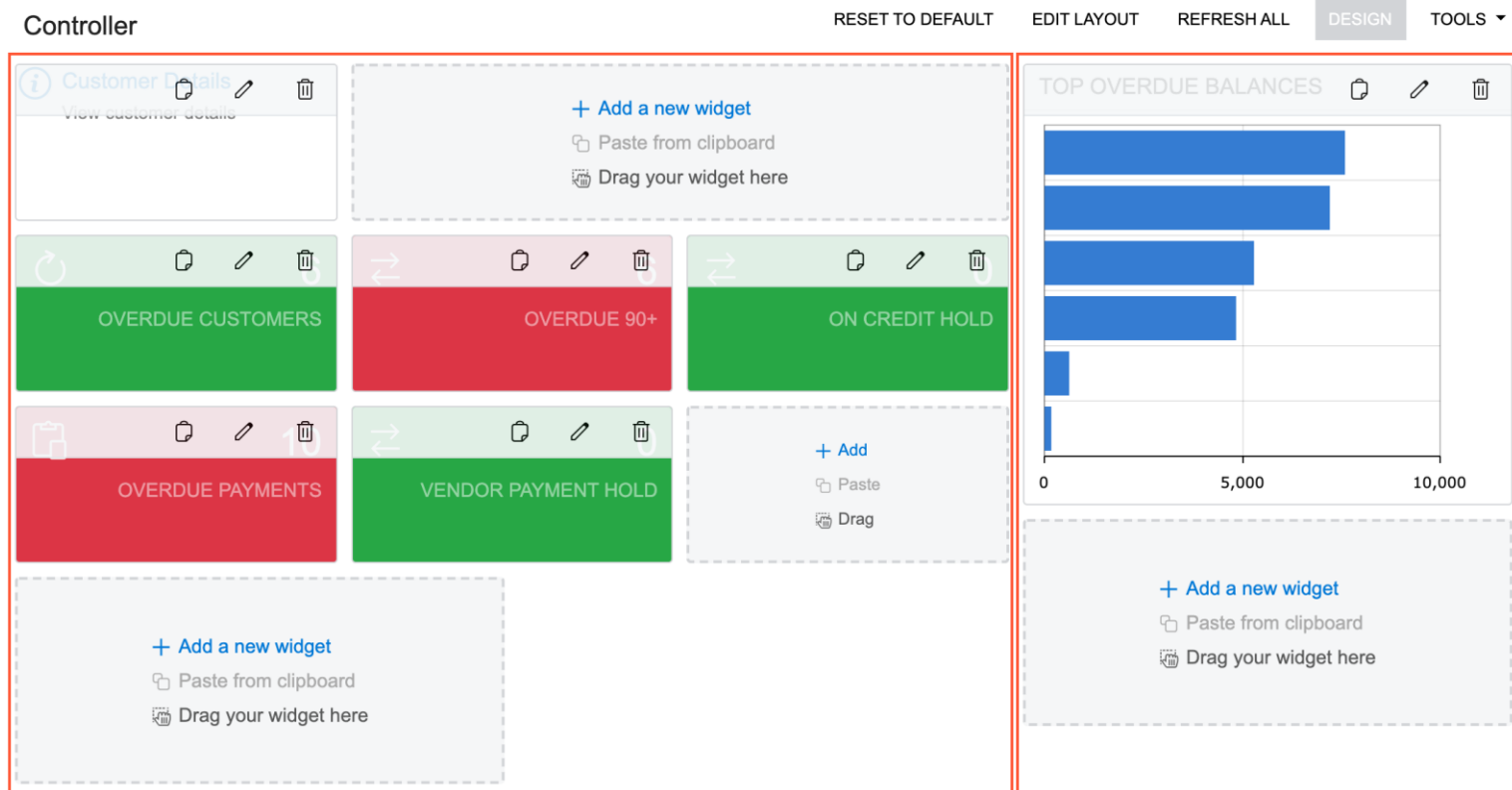


Figure: The dashboard with the relocated widgets

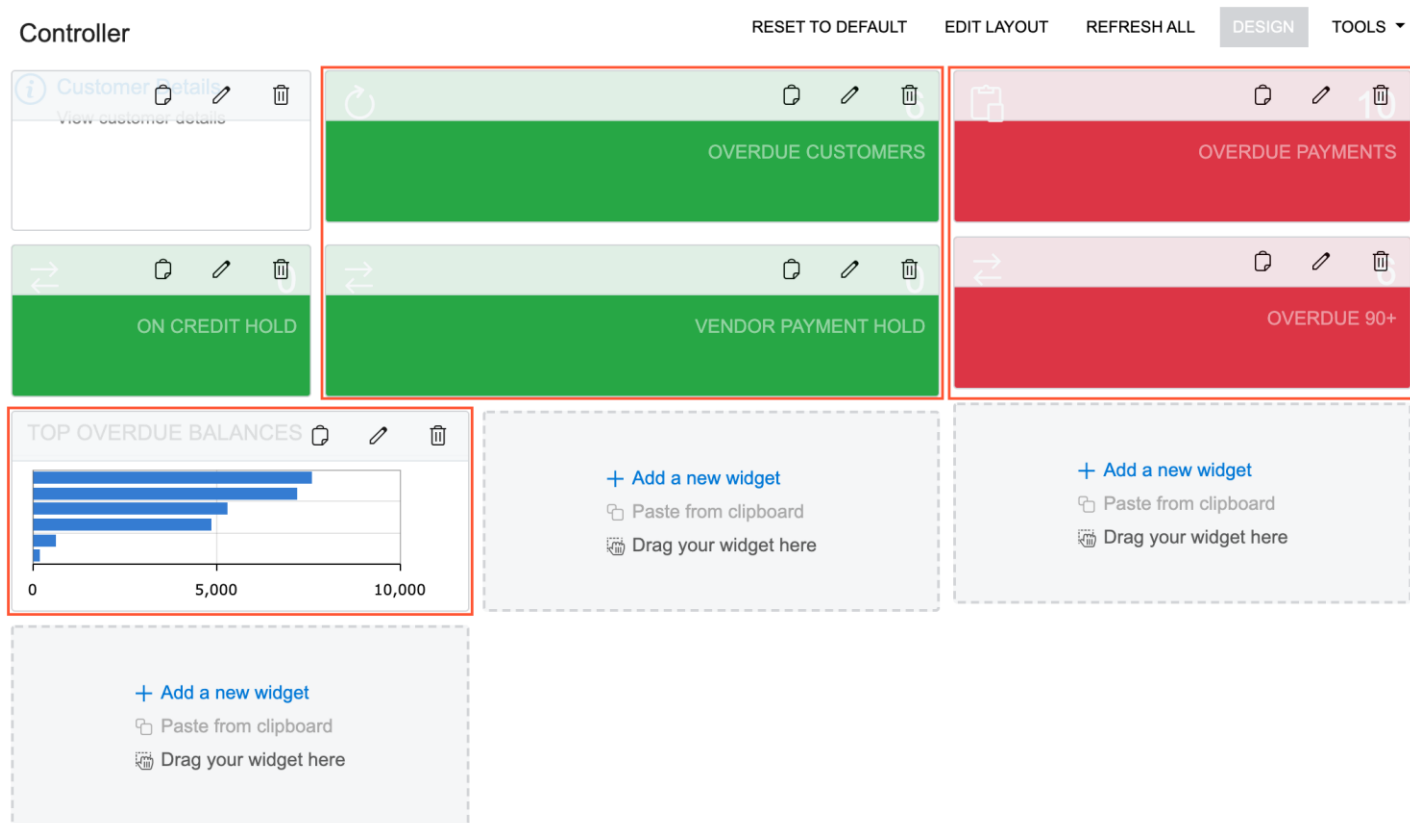
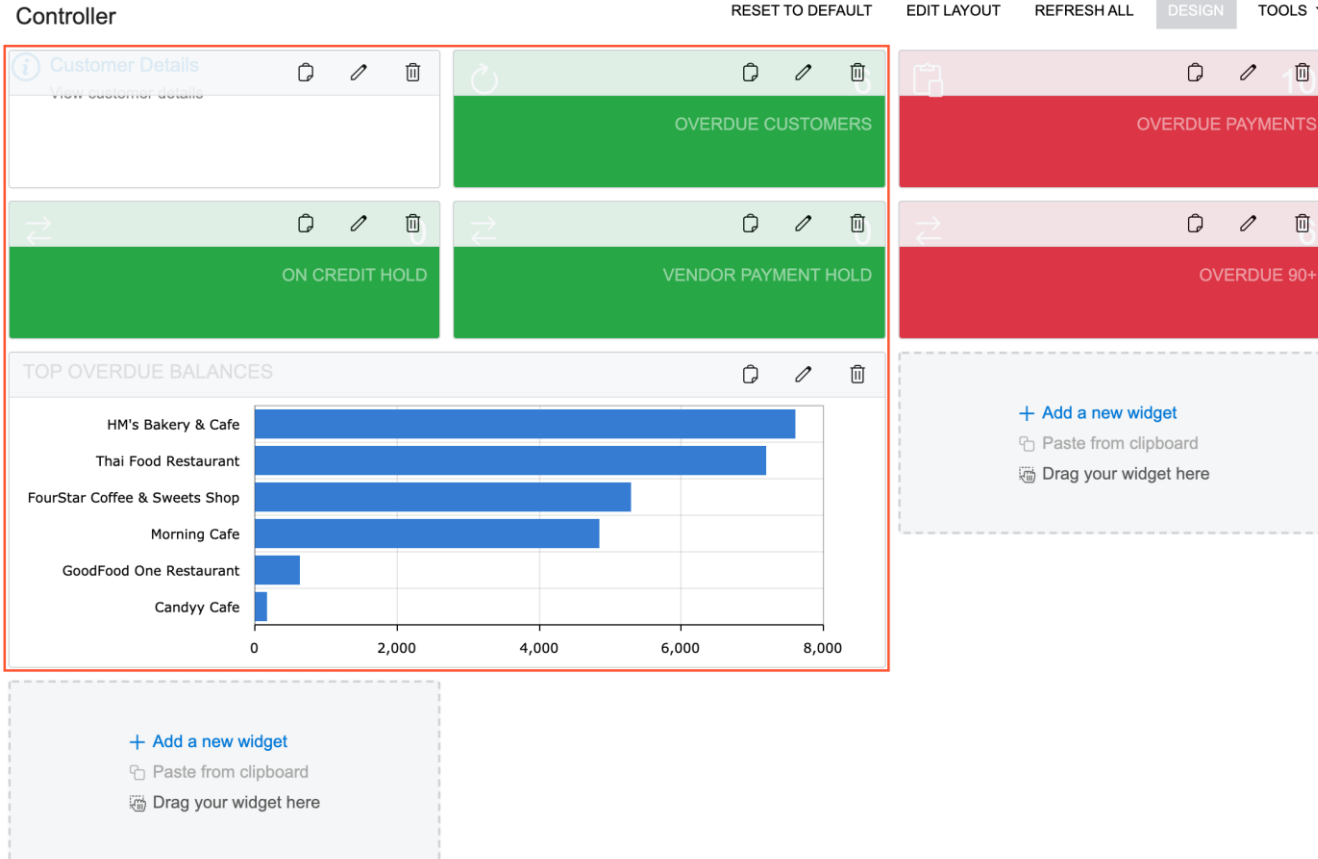


Figure: The dashboard with the resized widgets



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 Sales Manager Dashboard. The top navigation bar is blue and contains the SweetLife logo, a search bar, a refresh icon, a dropdown menu for 'SweetLife Fruits & Jams', a date/time selector for '10/12/2020 11:56 AM', a help icon, and a user profile for 'David Chubb'. Below the navigation bar, the main content area is titled 'Sales Mgr Dashboard' with a star icon. To the right of the title are three buttons: 'CREATE USER COPY', 'REFRESH ALL', and 'TOOLS'. On the left side, there is a sidebar with four menu items: 'Favorites', 'Data Views', 'Receivables', and 'Opportunities'.

SweetLife Search... SweetLife Fruits & Jams SweetLife Head Office and Wh... 10/12/2020 11:56 AM David Chubb

Sales Mgr Dashboard ☆ CREATE USER COPY REFRESH ALL TOOLS ▾

☆ Favorites
📊 Data Views
⊕ Receivables
🏷 Opportunities

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

The screenshot displays the SweetLife Sales Manager Dashboard. The top navigation bar is blue and contains the SweetLife logo, a search bar, a refresh icon, a dropdown menu for 'SweetLife Fruits & Jams', a date/time selector for '10/12/2020 12:49 PM', a help icon, and a user profile for 'Kimberly Gibbs'. Below the navigation bar, the left sidebar shows 'Favorites', 'Data Views', and 'Opportunities'. The main content area displays 'Sales Mgr Dashboard' with a star icon. On the right side of the main content area, there are buttons for 'REFRESH ALL', 'DESIGN' (highlighted with a red box), and 'TOOLS' with a dropdown arrow.

SweetLife 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 SweetLife Sales Manager Dashboard. The top navigation bar is blue and contains the SweetLife logo, a search bar, a refresh icon, a dropdown menu for 'SweetLife Fruits & Jams', a date/time selector for '10/12/2020 12:49 PM', a help icon, and a user profile for 'Kimberly Gibbs'. Below the navigation bar, the left sidebar shows 'Favorites', 'Data Views', and 'Opportunities'. The main content area displays 'Sales Mgr Dashboard' with a star icon. On the right side of the main content area, there are links for 'REFRESH ALL', 'DESIGN' (highlighted with a red box), and 'TOOLS' with a dropdown arrow.

SweetLife 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

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

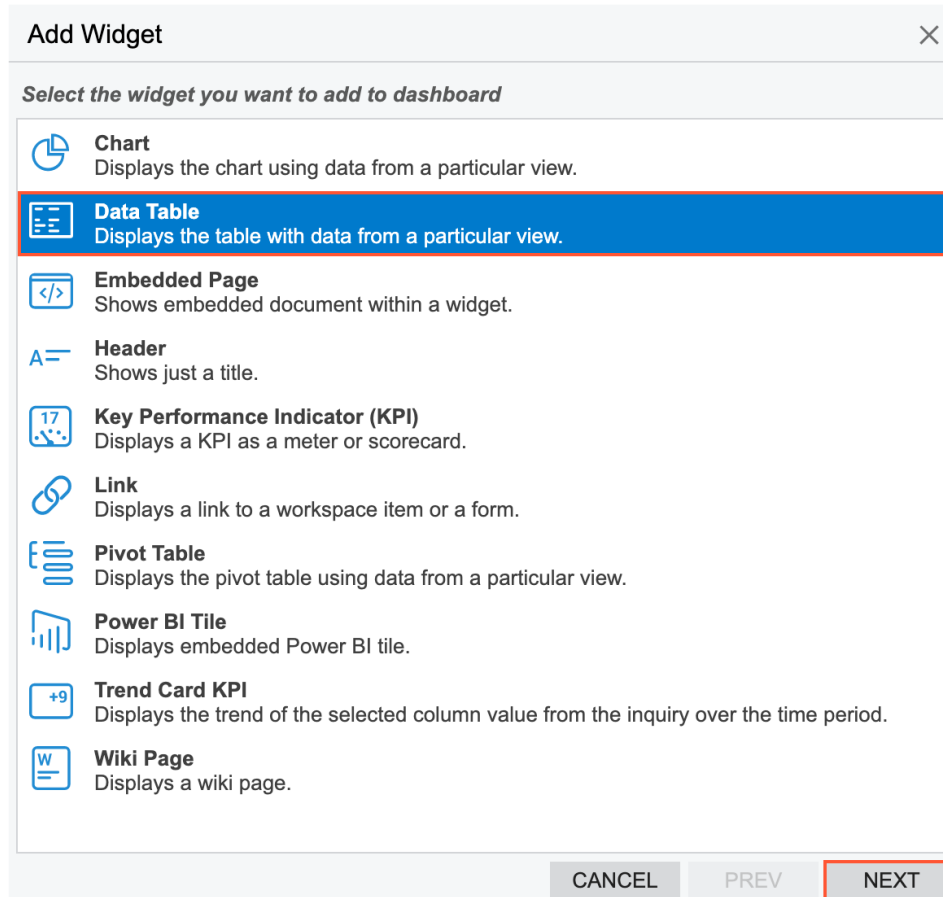


Figure: Caching settings of a widget

Widget Properties

×

Specify the widget properties

* Inquiry Screen:

Sales Orders

🔍

INQUIRY PARAMETERS

Shared Filter to Apply:

All Records

🔍

FILTER SETTINGS

Refresh Data:

Every 30 Min

▼

On Page Reload

Every 5 Min

Every 15 Min

Every 30 Min

Every Hour

Every 4 Hours

Every 12 Hours

Every Day

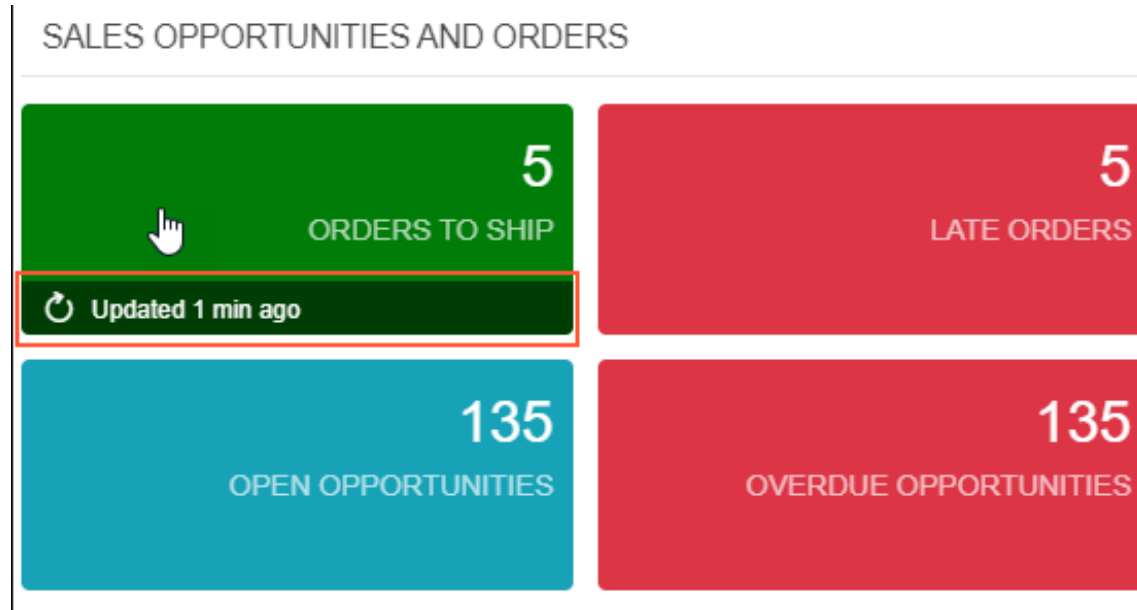
Every Week

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

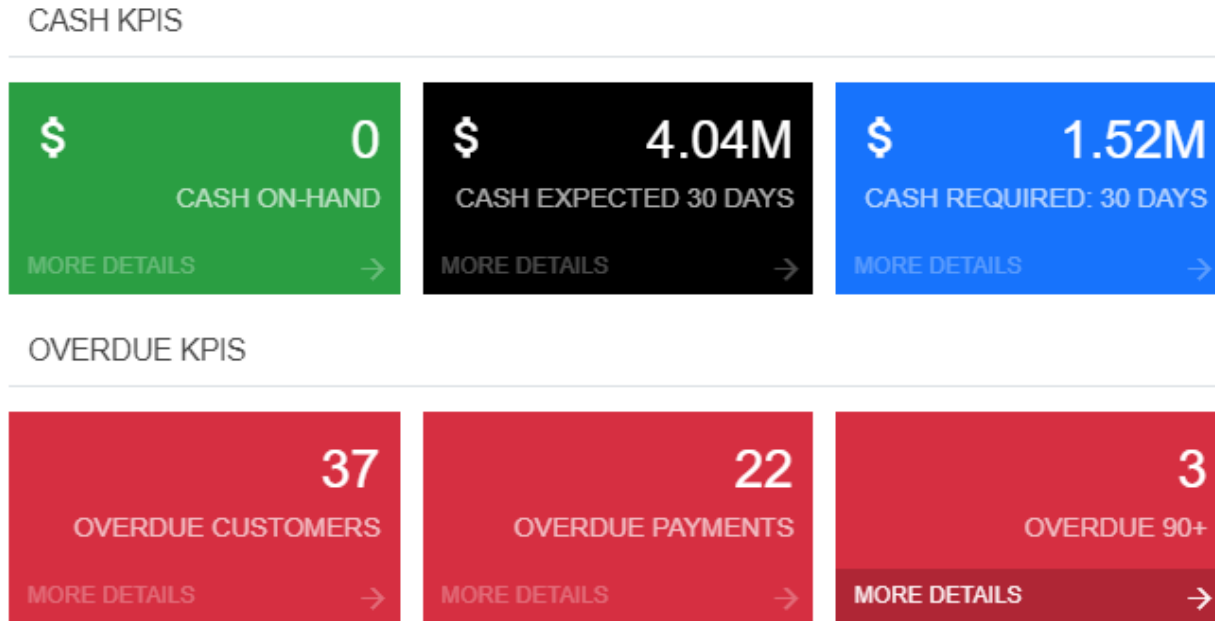


Figure: Properties of a header widget

Widget Properties

×

Specify the widget properties

Caption:


cash kpis

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:

Customers

🔍

INQUIRY PARAMETERS

Shared Filter to Apply:

(Custom)

🔍

FILTER SETTINGS

Refresh Data:

On Page Reload

▼

Record Limit:

15

☒ Automatically Adjust Height

COLUMN SETTINGS

Caption:

Top 15 Customers

CANCEL

FINISH

Figure: Pivot table widget

🔄 OPEN CASES

| Account N | | | | |
|----------------------------|------------|----------|------------|----------|
| 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 Search... SweetLife Fruits & Jams SweetLife Head Office and Wh... Kimberly Gibbs

★ Favorites Data Views Time and Expenses Finance Banking Construction Project Management Compliance Payables Receivables Sales Orders

Vendor Details CUSTOMIZATION TOOLS

Company/Branch: HEADOFFICE - SweetLife Head ... Show All Documents ☒

* Vendor: ALLFRUITS - All Fruits Mail Include Unreleased Documents ☐

Period: AP Account:

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 |
|---|--------------------------|------------|-------|------------------------|-----------|---------------|--------|----------------|----------|---------------------|
| > | <input type="checkbox"/> | HEADOFFICE | Bill | 000049 | 2/20/2021 | 02-2021 | Open | 1,139.10 | 1,139.10 | 0.00 |
| | <input type="checkbox"/> | HEADOFFICE | Bill | 000037 | 1/30/2021 | 01-2021 | Closed | 200.00 | 0.00 | 0.00 |
| | <input type="checkbox"/> | HEADOFFICE | Check | 000023 | 1/30/2021 | 01-2021 | Closed | -200.00 | 0.00 | 0.00 |
| | <input type="checkbox"/> | HEADOFFICE | Bill | 000028 | 1/22/2021 | 01-2021 | Closed | 114.50 | 0.00 | 0.00 |
| | <input type="checkbox"/> | HEADOFFICE | Check | 000018 | 1/22/2021 | 01-2021 | Closed | -114.50 | 0.00 | 0.00 |
| | <input type="checkbox"/> | HEADOFFICE | Bill | 000027 | 1/15/2021 | 01-2021 | Closed | 525.00 | 0.00 | 0.00 |
| | <input type="checkbox"/> | HEADOFFICE | Check | 000017 | 1/15/2021 | 01-2021 | Closed | -525.00 | 0.00 | 0.00 |
| | <input type="checkbox"/> | 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 software interface. The top navigation bar includes the SweetLife logo, a search bar, and user information for Kimberly Gibbs. The left sidebar lists various modules: Favorites, Data Views, Time and Expenses, Finance, Banking, Construction, and Project Management. The main content area shows the 'Bills and Adjustments' section for 'Bill 000060 - All Fruits Mall'. A red box highlights the 'Vendor' field, which is set to 'ALLFRUITS - All Fruits Mall'. An 'Element Properties' dialog box is open, showing details for the 'VendorID' data field. The dialog box includes fields for Control Type (Segment Mask), Data Class (APInvoice), Data Field (VendorID), View Name (Document), and Business Logic (APInvoiceEntry). The bottom status bar indicates the product is in trial mode and provides an 'ACTIVATE' button.

ScreenId=AP301000&DocType=INV&RefNbr=000060

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

Bill 000060 - All Fruits Mall

REMOVE HOLD

Type: Bill * Vendor: ALLFRUITS - All Fruits Mall

Reference Nbr.: 000060 * Location:

Status: On Hold * Terms:

* Date: 10/11/2021 * Due Date:

* Post Period: 10-2021 * Cash Discount:

Vendor Ref.:

Description:

DETAILS FINANCIAL TAXES APPLICATION

VIEW DEFERRALS ADD PO RECEIPT ADD PO RECEIPT LINE ADD PO ADD SUBCONTRACT ADD PO LINE

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

Element Properties

Control Type: Segment Mask

Data Class: APInvoice

Data Field: VendorID

View Name: Document

Business Logic: APInvoiceEntry

CUSTOMIZE ACTIONS CANCEL

Widget Properties

Specify the widget properties

* Icon:

\$ account balance

* Form:

Vendor Details

Parameters:

VendorID=ALLFRUITS+&ShowAllDocs=1

Description:

Fruit Mall Vendor Details

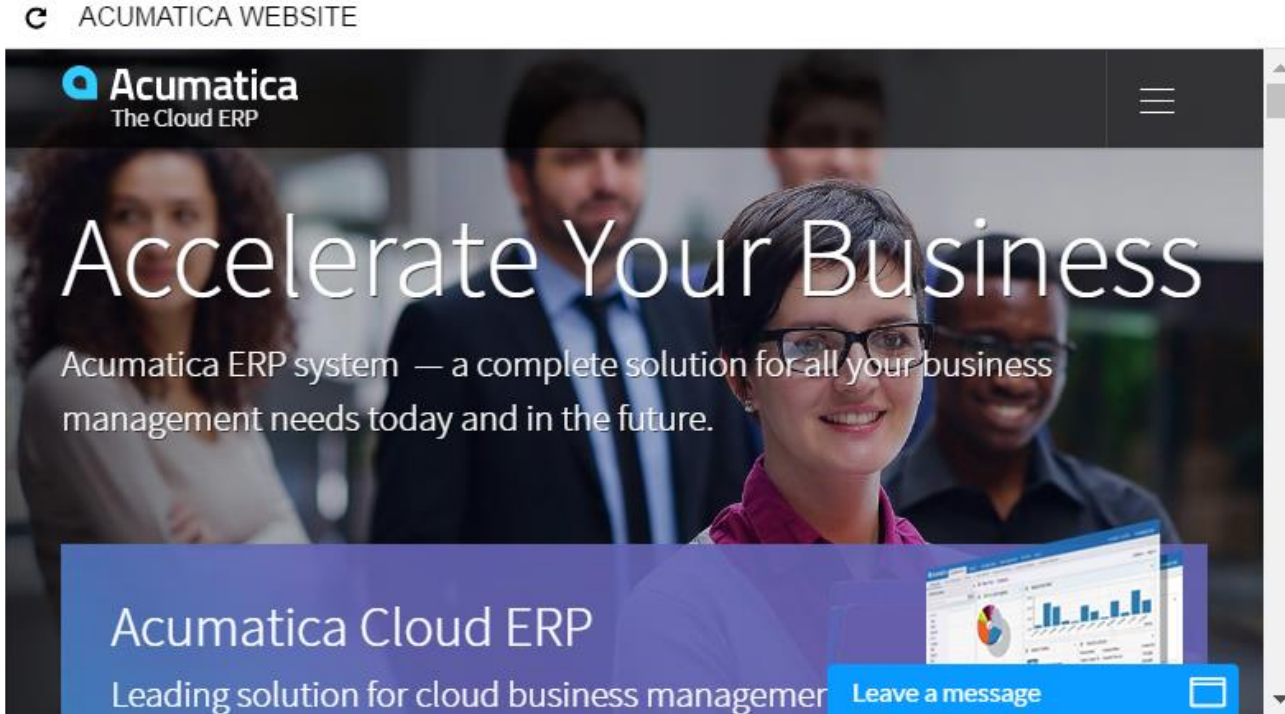
Caption:

Fruit Mall

CANCEL

FINISH

Figure: Embedded page widget



Widget Properties

Specify the widget properties

* Source:

https://openuni.acumatica.com/

Caption:

Acumatica Open University

CANCEL

FINISH

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

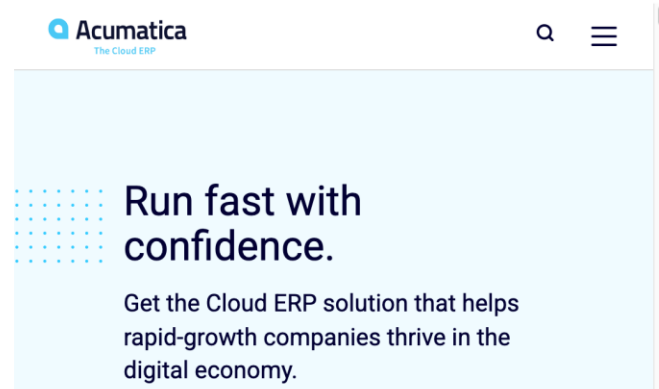
Sales Mgr Dashboard

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 | Candyy 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

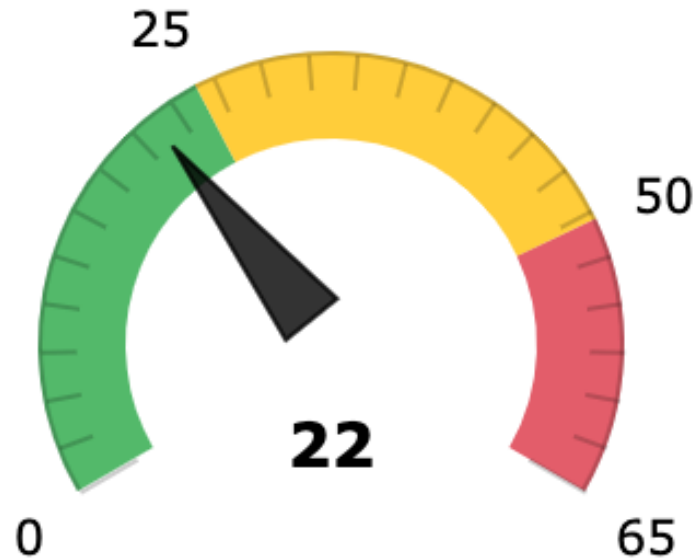


Figure: Range placement if the Normal Level value is negative and less than the Alarm Level value

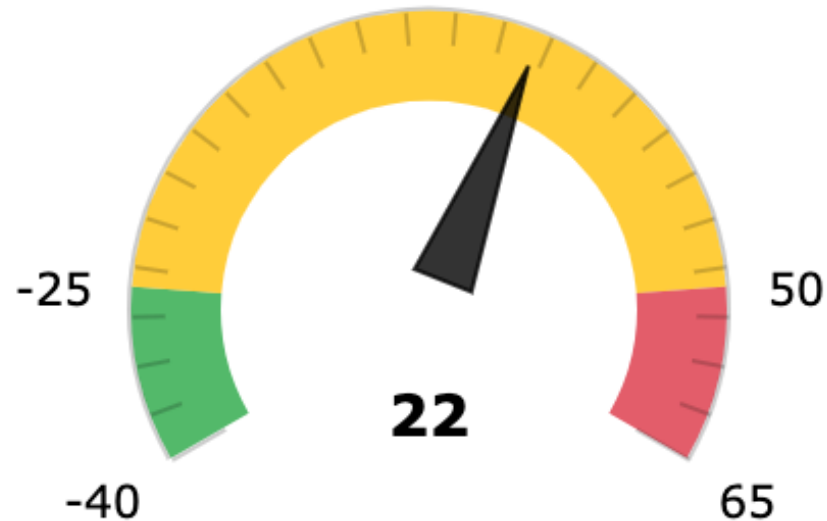


Figure: Range placement if the Alarm Level value is less than the Normal Level value

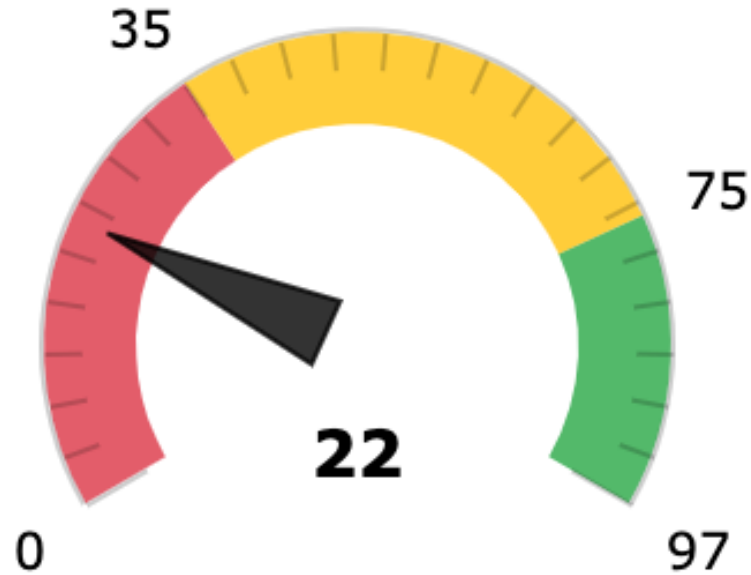


Figure: Scorecard KPI widget

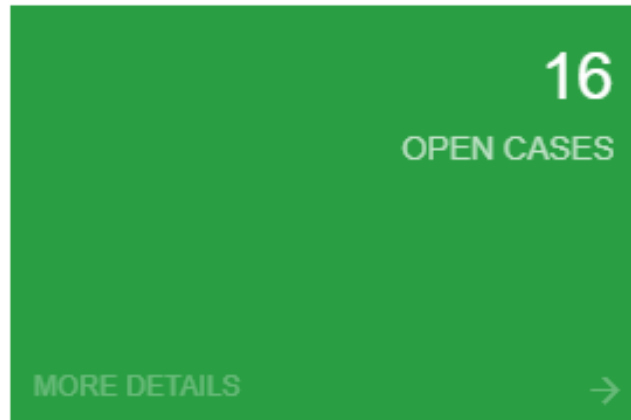


Figure: Properties of a scorecard widget

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

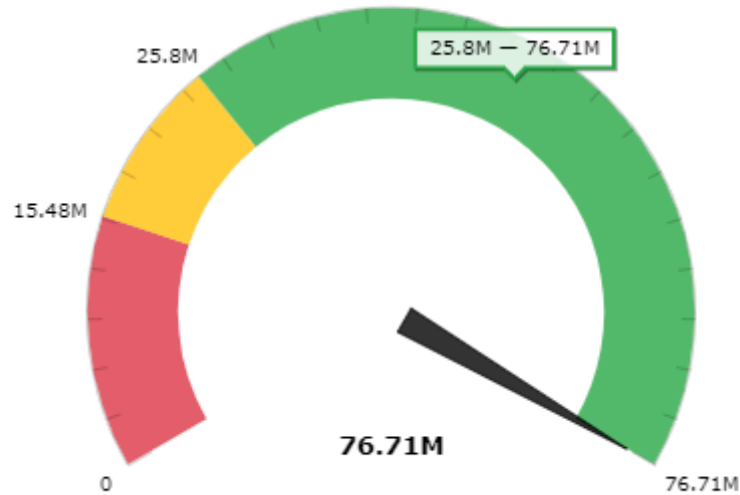


Figure: Trend card widget

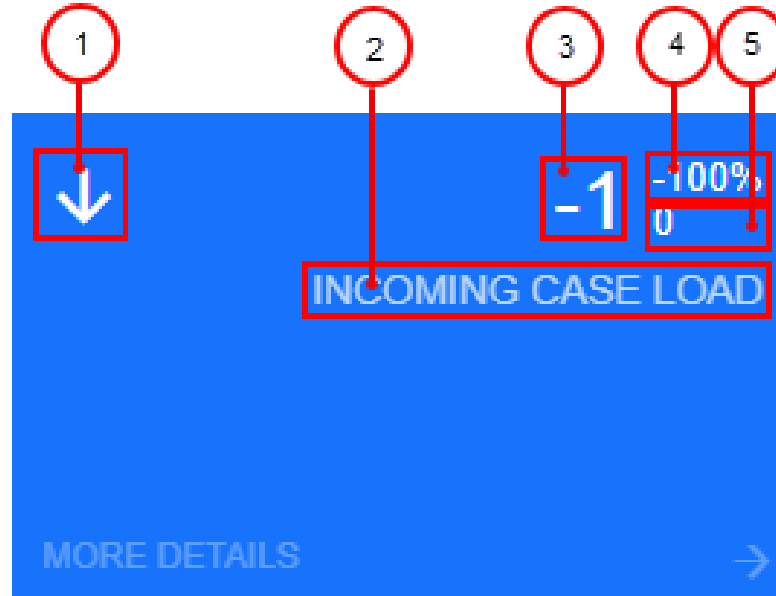


Figure: Properties of a trend card widget

Widget Properties

×

Specify the widget properties

* Inquiry Screen:

Cases

🔍

Shared Filter to Apply:

All Records

🔍

Refresh Data:

Every 5 Min

▼

* Field to Aggregate:

Case ID

▼

Aggregate Function:

Count All

▼

Timeline Field:

Created On

▼

Period:

Last Month

▼

Rising Trend Color:

Red

▼

Flat Trend Color:

Yellow

▼

Falling Trend Color:

Green

▼

Caption:

Incoming case load

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

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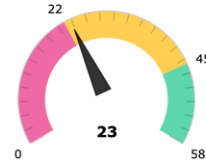
Figure: The Sales Mgr Dashboard with the changed layout and additional widgets

Sales Mgr Dashboard

REFRESH ALL DESIGN TOOLS ▾



NUMBER OF CUSTOMERS



Customer Details

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

CUSTOMER ACCOUNTS

| Customer ID | Customer Name | Country | City | Terms |
|---------------------------|-----------------------------|--------------------|----------|---------------------|
| 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 & Sweets... | US | New York | 30D |
| DELIEN... | Delicious Energy Restaur... | US | New York | 30D |
| EASYDI... | EasyDiner Co. | CA | Atwood | 30D |

SALES ORDERS



ACUMATICA WEBSITE

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[Schedule a demo →](#)

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:

DB Opportunities

INQUIRY PARAMETERS

Shared Filter to Apply:

All Records

FILTER SETTINGS

Refresh Data:

Every 30 Min

CONFIGURE

Caption:

Opportunity Distribution and Status

CANCEL

FINISH

Figure: Selection of a chart type

Chart Settings

* Chart Type: Column

Legend Position:

CATEGORIES

* Legend:

Sort By:

Maximum Number of Values Shown:

SERIES

Legend:

Sort By:

Maximum Number of Values Shown:

Color:

VALUES

* Value: Opportunity ID

Count All

OK

Descendi...

Descendi...

10 ☐ Show Sum of Other Entries

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:

10

☐ Show Sum of Other Entries

SERIES

Legend:

Status

Sort By:

Legend Values

Descendi...

Maximum Number of Values Shown:

10

☐ Show Sum of Other Entries

Color:

VALUES

* Value:

Opportunity ID

Count All

OK

Figure: A column chart with series

OPPORTUNITY DISTRIBUTION AND STATUS

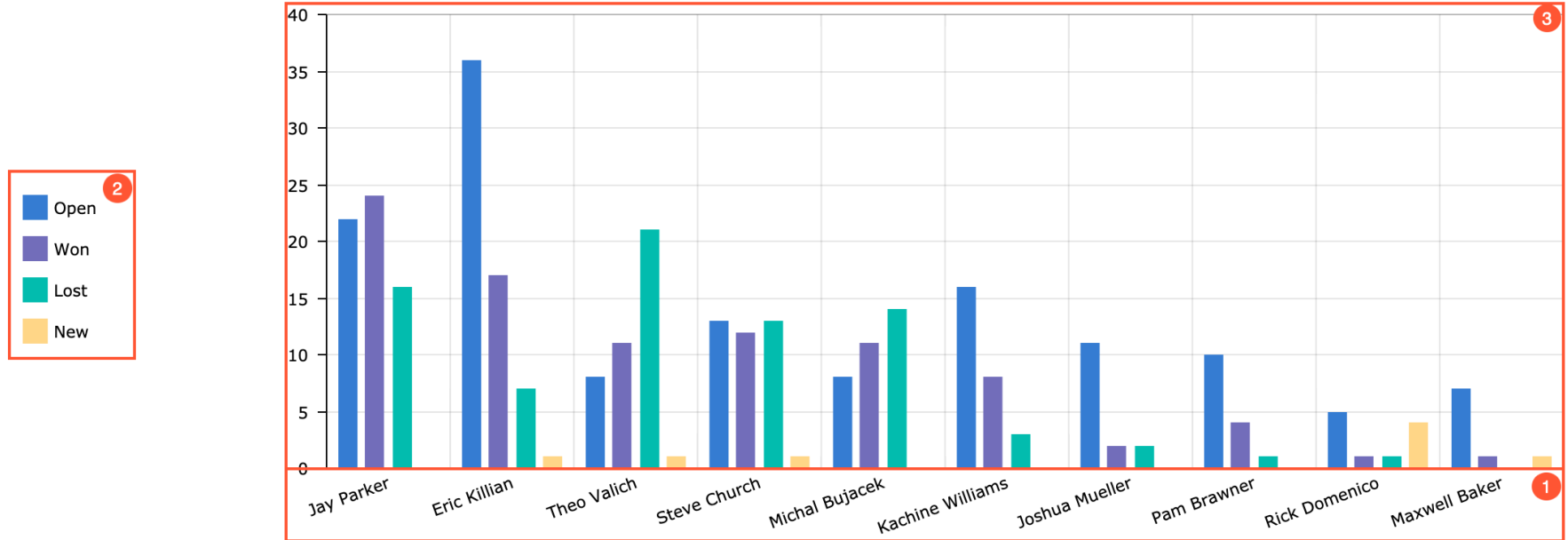


Figure: Line chart with multiple lines

SALES BY QUARTERS  Updated a moment ago

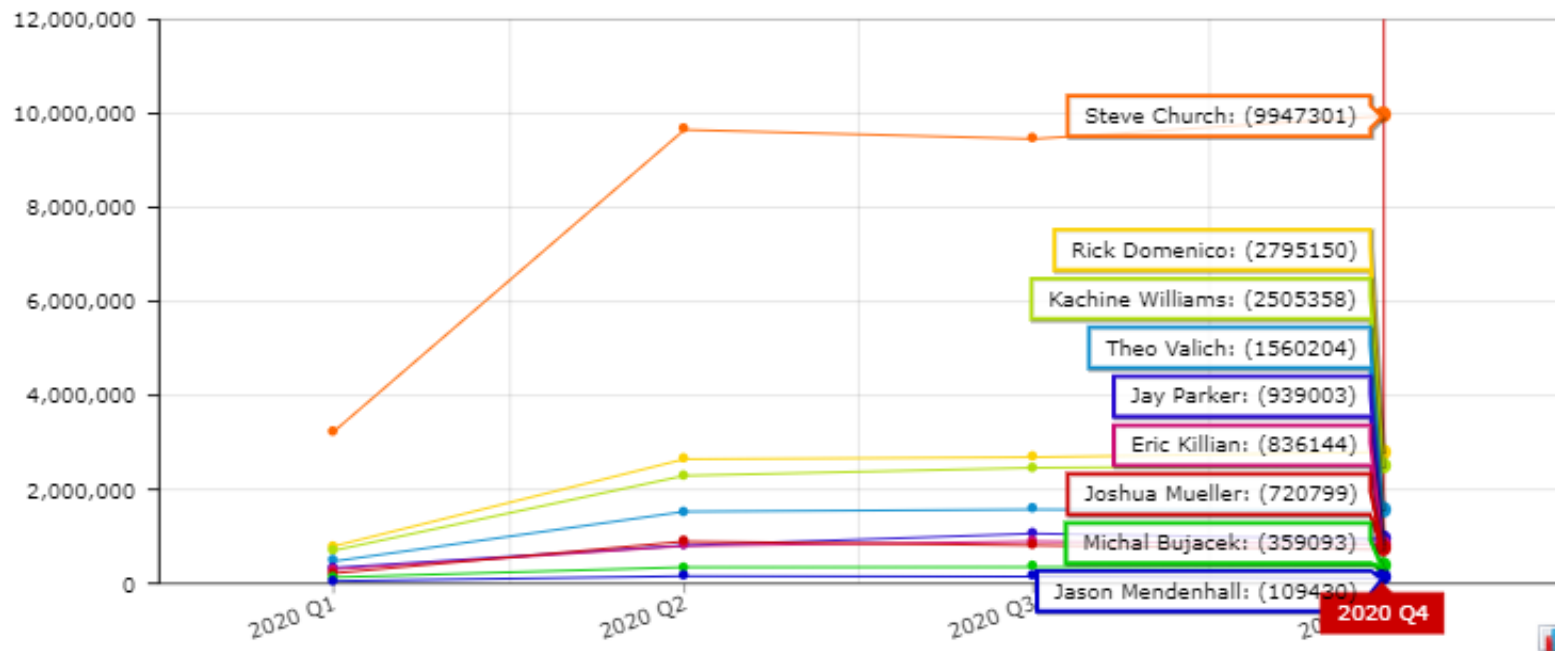


Figure: Column chart

MY TEAM'S SALES BOOKINGS

Updated a moment ago

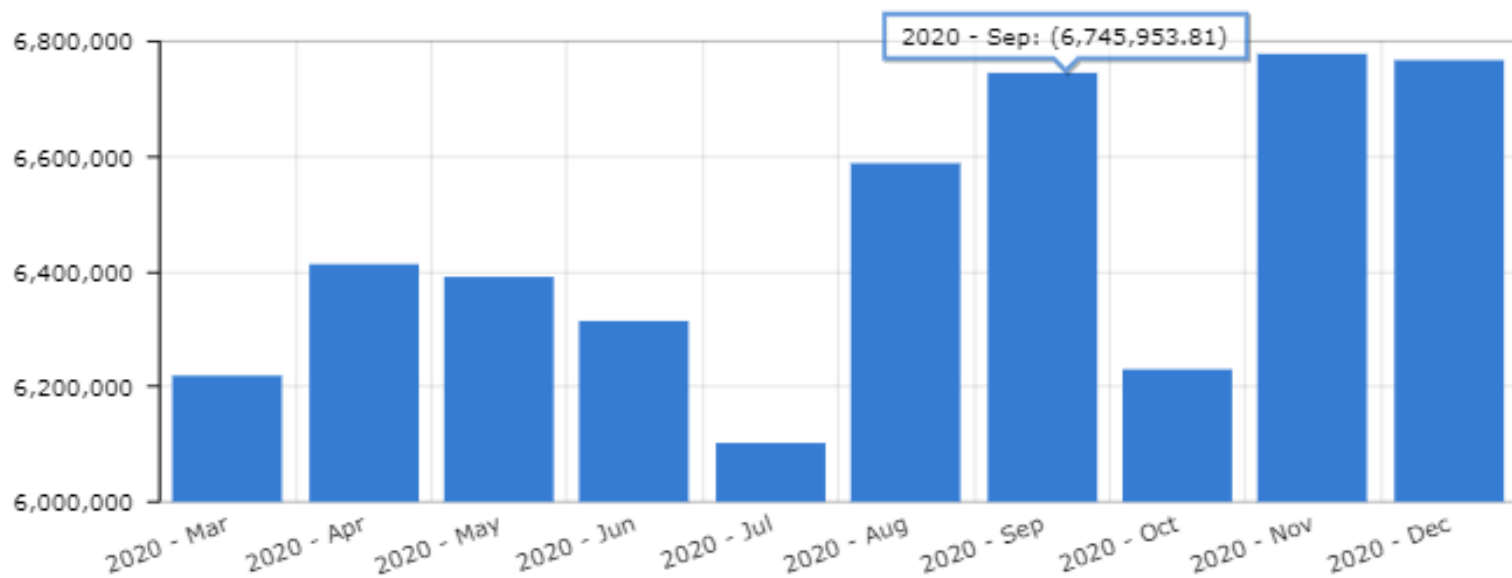
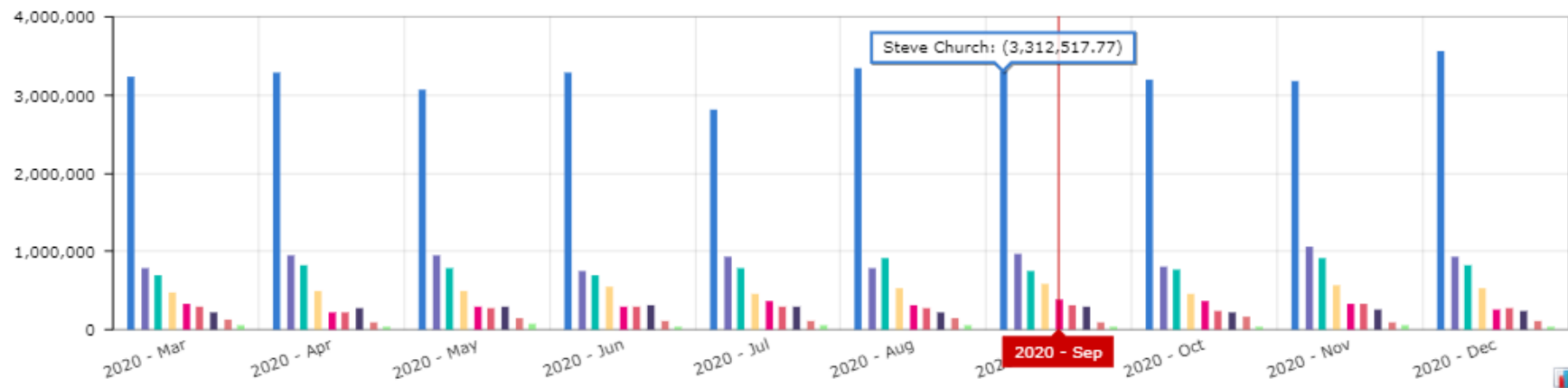


Figure: Column chart with series

MY TEAM'S SALES BOOKINGS Updated a moment ago



KEY CUSTOMER GROWTH

Figure: Bar chart

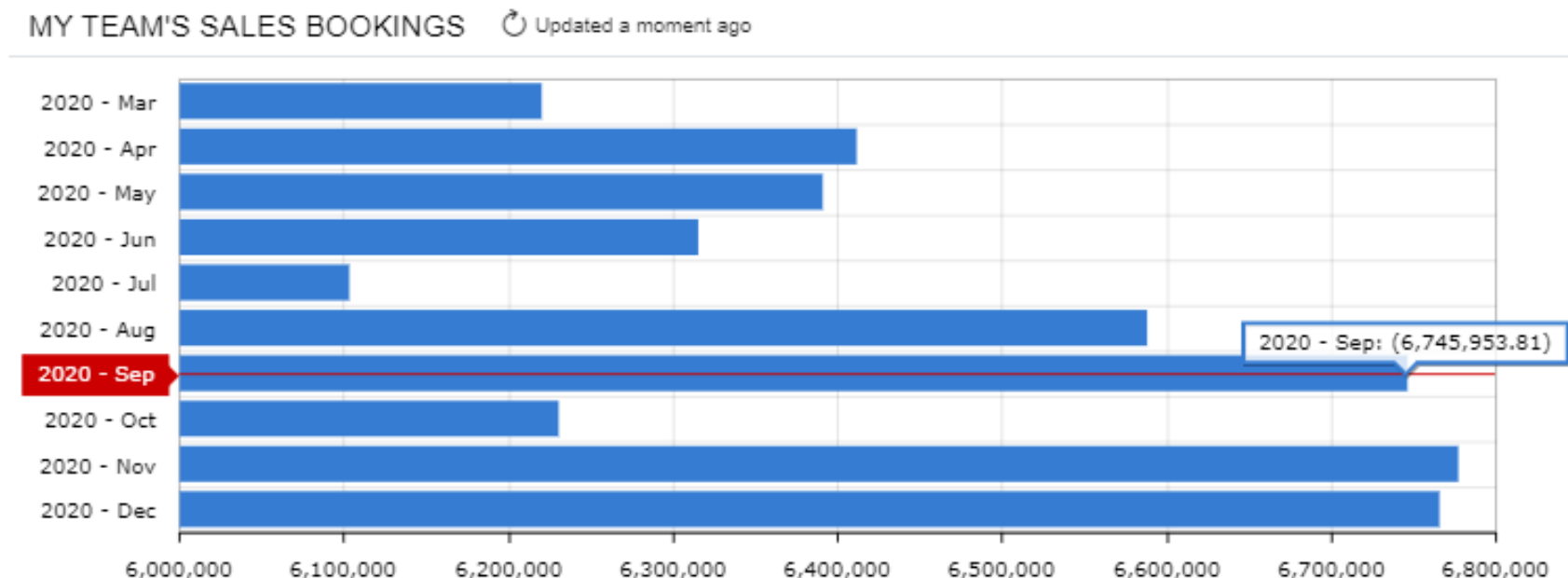


Figure: Bar chart with series

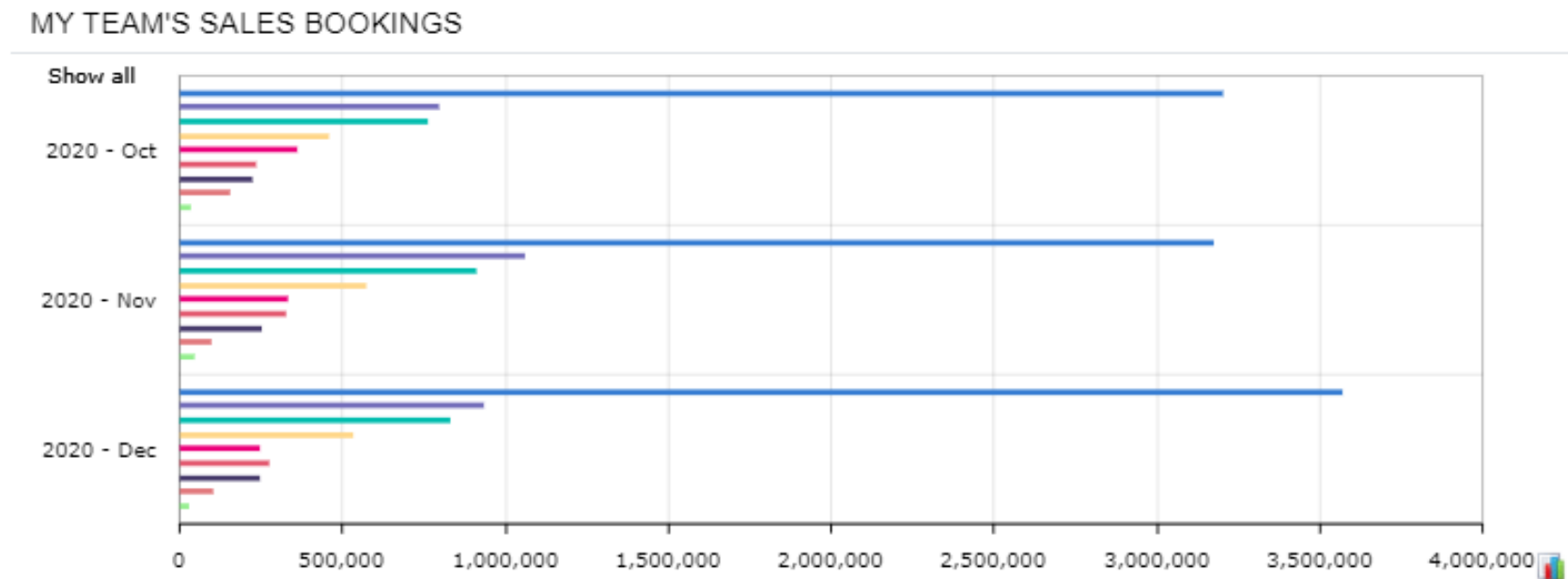


Figure: Stacked column chart

MY TEAM'S SALES BOOKINGS  Updated a moment ago

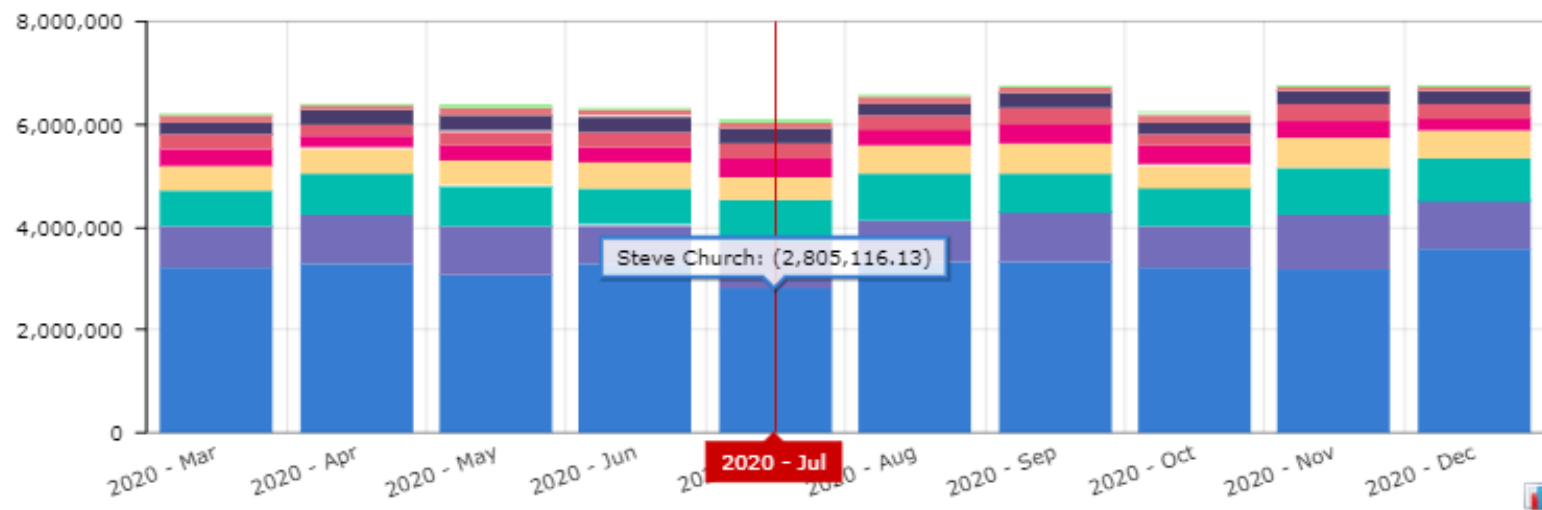


Figure: Stacked bar chart

MY TEAM'S SALES BOOKINGS  Updated a moment ago

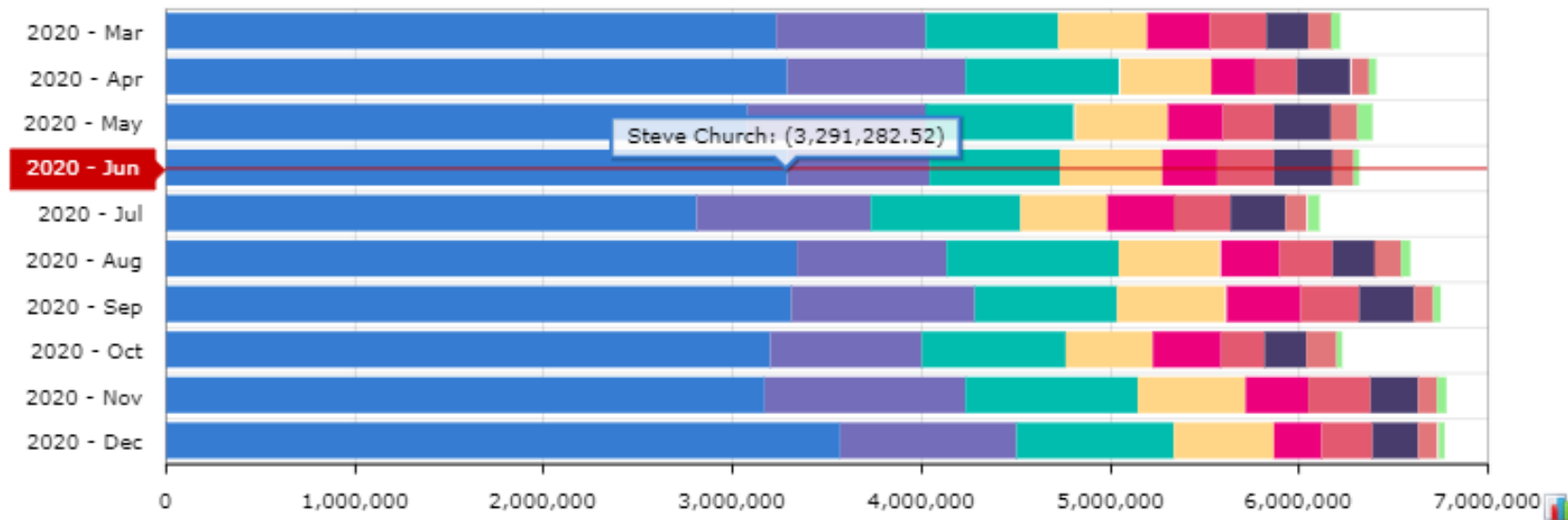


Figure: Doughnut chart

SUPPORT HOURS BY EMPLOYEES

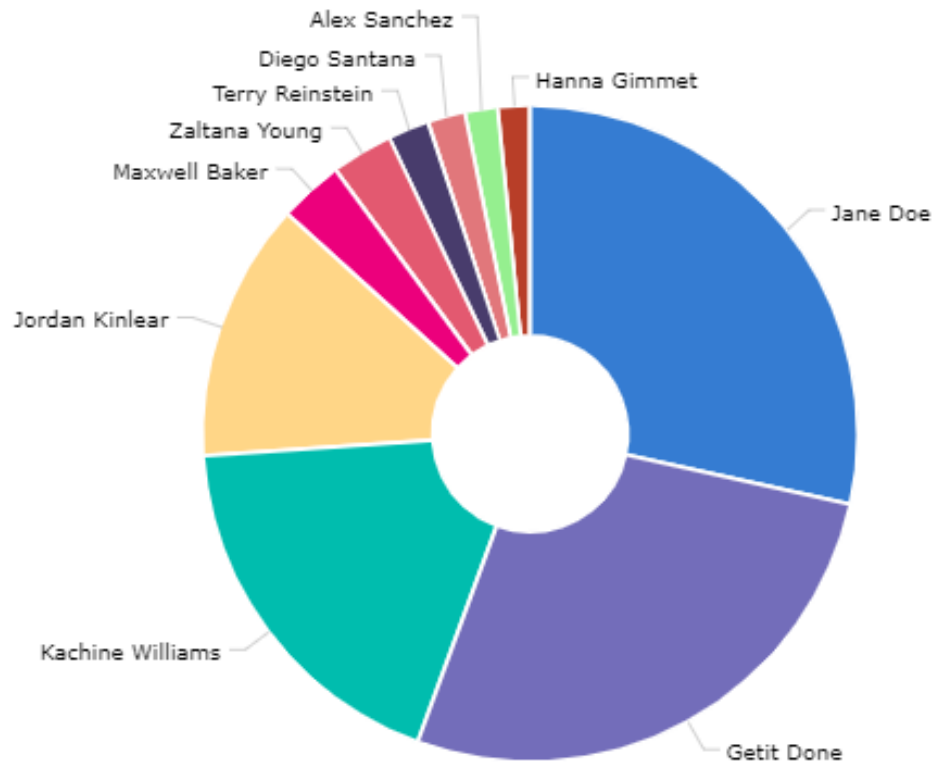
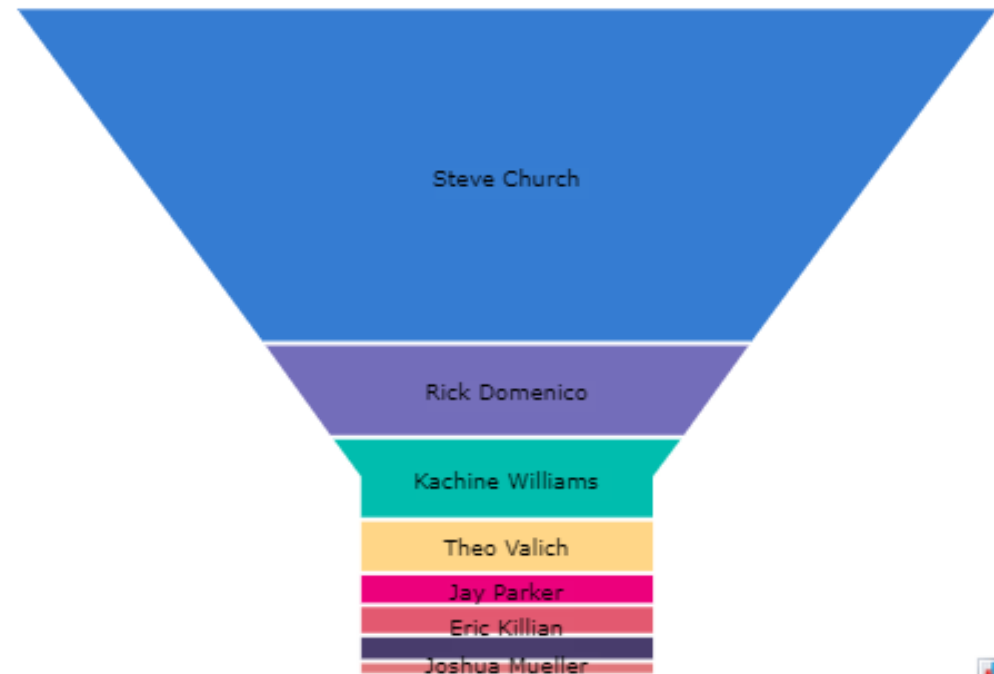


Figure: Funnel chart

MY TEAM'S SALES BOOKINGS



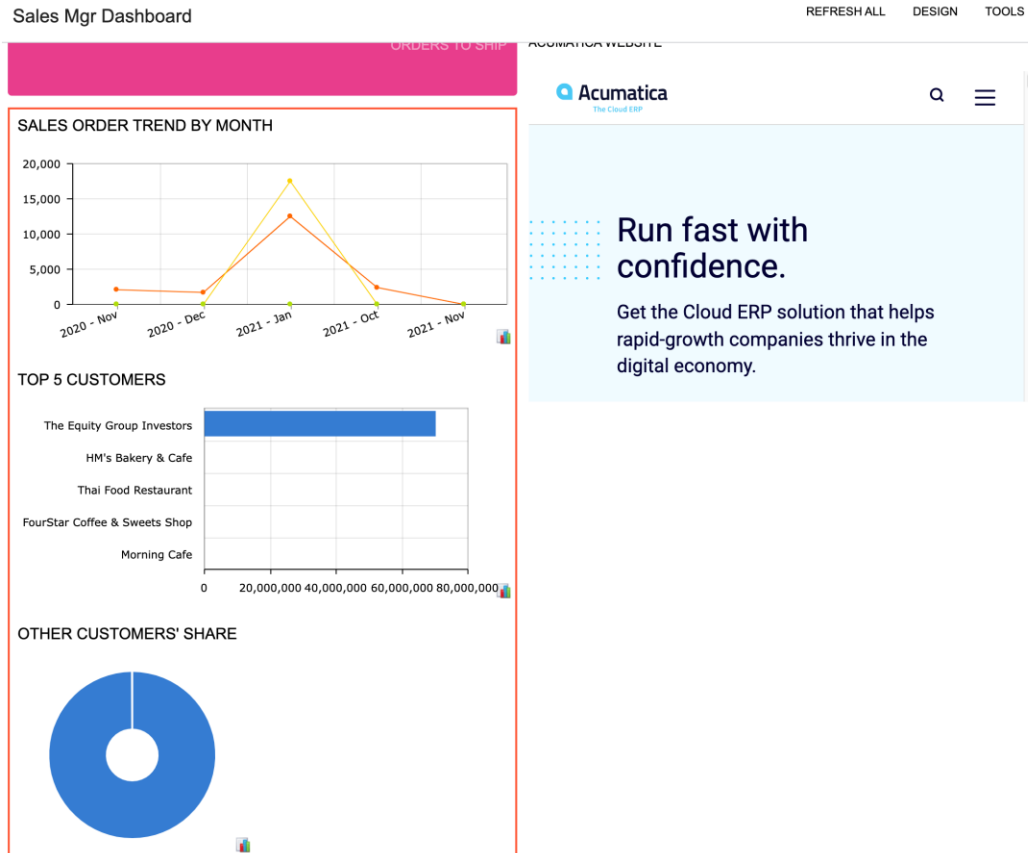
Specific Widgets: To Add Chart Widgets

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

Widget Properties

Specify the widget properties

* Inquiry Screen:

DB Opportunities

INQUIRY PARAMETERS

Shared Filter to Apply:

All Records

FILTER SETTINGS

Refresh Data:

Every 30 Min

CONFIGURE

Caption:

Opportunity Distribution and Status

Select - Shared Filter to Apply

SELECT

↺

↔

Name

↑

All Records

> Closing in 60 Days

Closing in 60 Days (me)

Lost

No Activity 30 days

⏪ ⏩ ⏴ ⏵

CANCEL

FINISH

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

Widget Properties

Specify the widget properties

* Inquiry Screen: DB Opportunities

INQUIRY PARAMETERS

Shared Filter to Apply: (Custom)

Refresh Data:

Filter Settings

Filter Settings

+ X

| | Activ | Bra | * Data Field | * Condition | Use Para | Val 1 | Val 2 | Bra | Opera |
|--|-------------------------------------|-----|--------------|-------------|--------------------------|-------|-------|-----|-------|
| | <input checked="" type="checkbox"/> | | Status | Equals | <input type="checkbox"/> | | | | And |

New
Open
Won
Lost

CANCEL OK

CANCEL FINISH

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

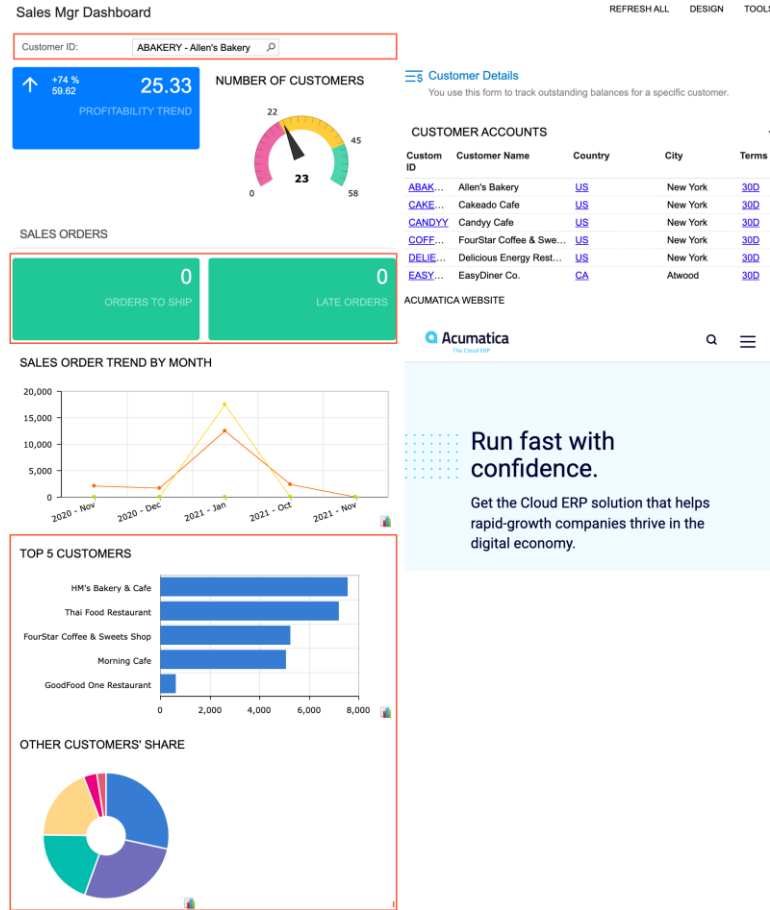
Suppose that you are a technical specialist in your company who is working on simple customizations. A sales manager of your company had previously requested a dashboard named Sales Mgr Dashboard, and you created the requested dashboard form. After that, the sales manager requested that you add multiple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