

# CTTK

## Duplicate Dashboards

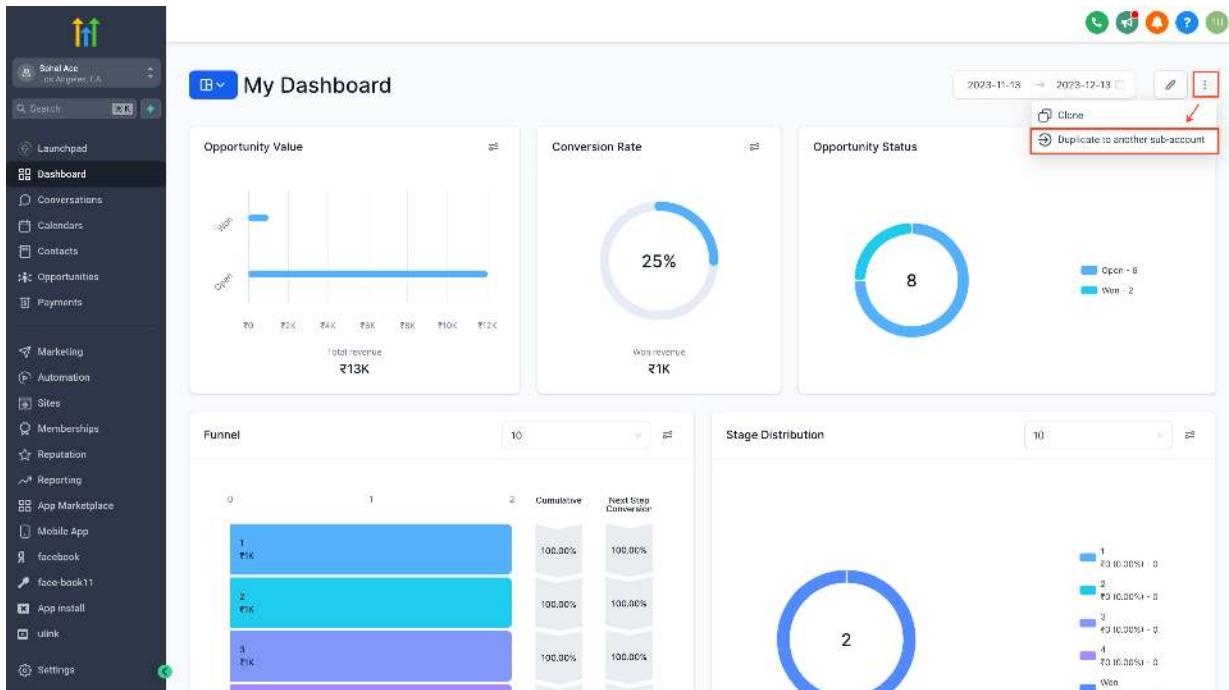


# How to duplicate a dashboard to another sub-account Print

Great news for Agency Admins! Now, you can effortlessly duplicate dashboards to different sub-account, saving time and streamlining your reporting process. This guide walks you through the simple steps to clone dashboards, ensuring a smooth transition and providing valuable insights for sub-accounts.

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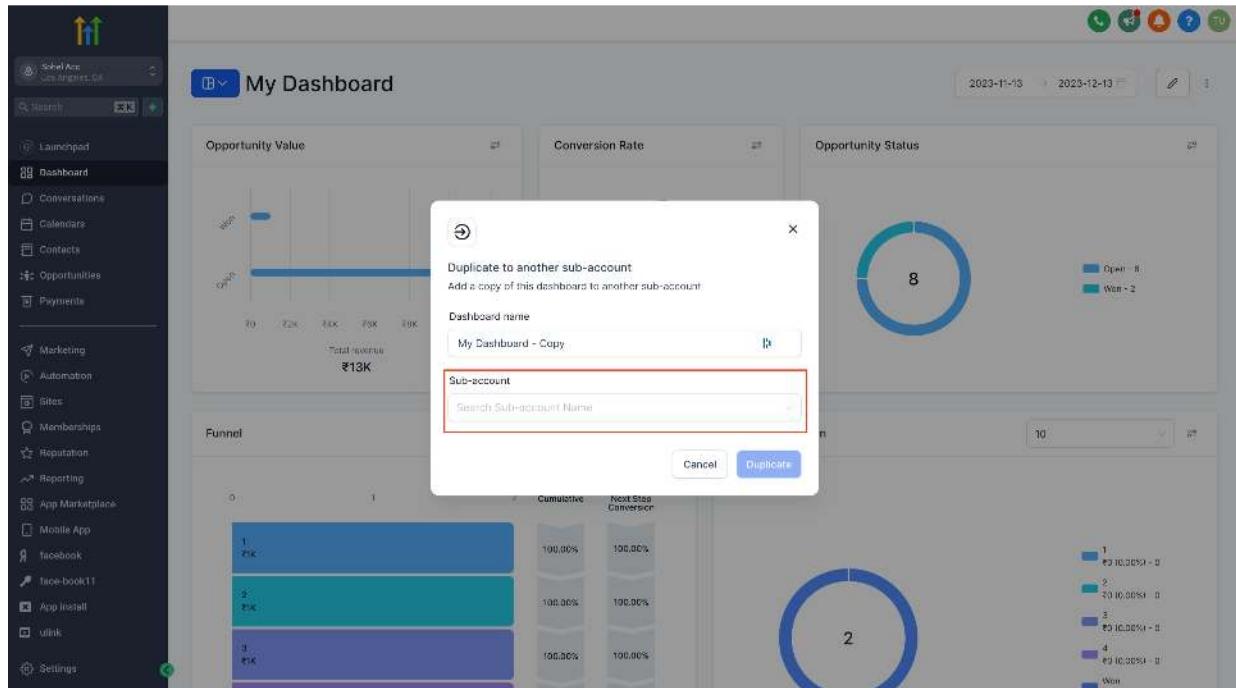
### Step 2: Choose "Duplicate to another sub-account"



Select the option to duplicate the dashboard to a different sub-account.

### Step 3: Customize the duplicate dashboard name

## Duplicate Dashboards



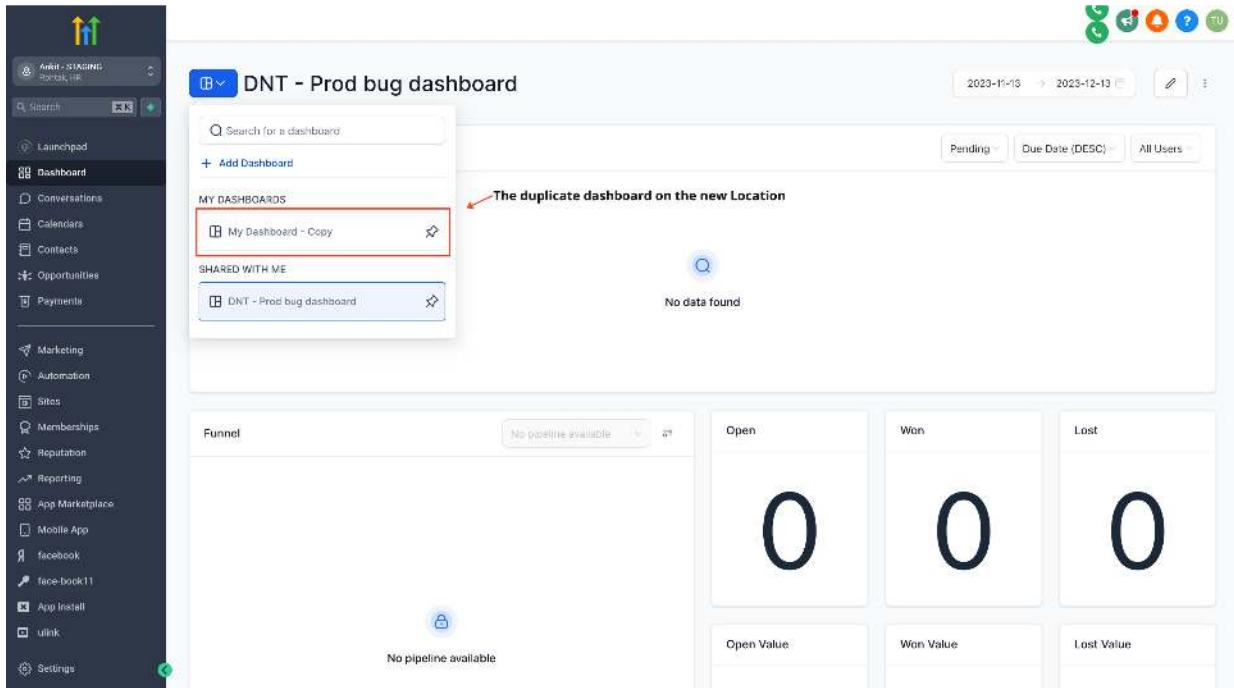
Change the name of the duplicated dashboard as per your requirement.

### Step 4: Select the target sub-account

Search and choose the sub-account where you want to duplicate the dashboard.

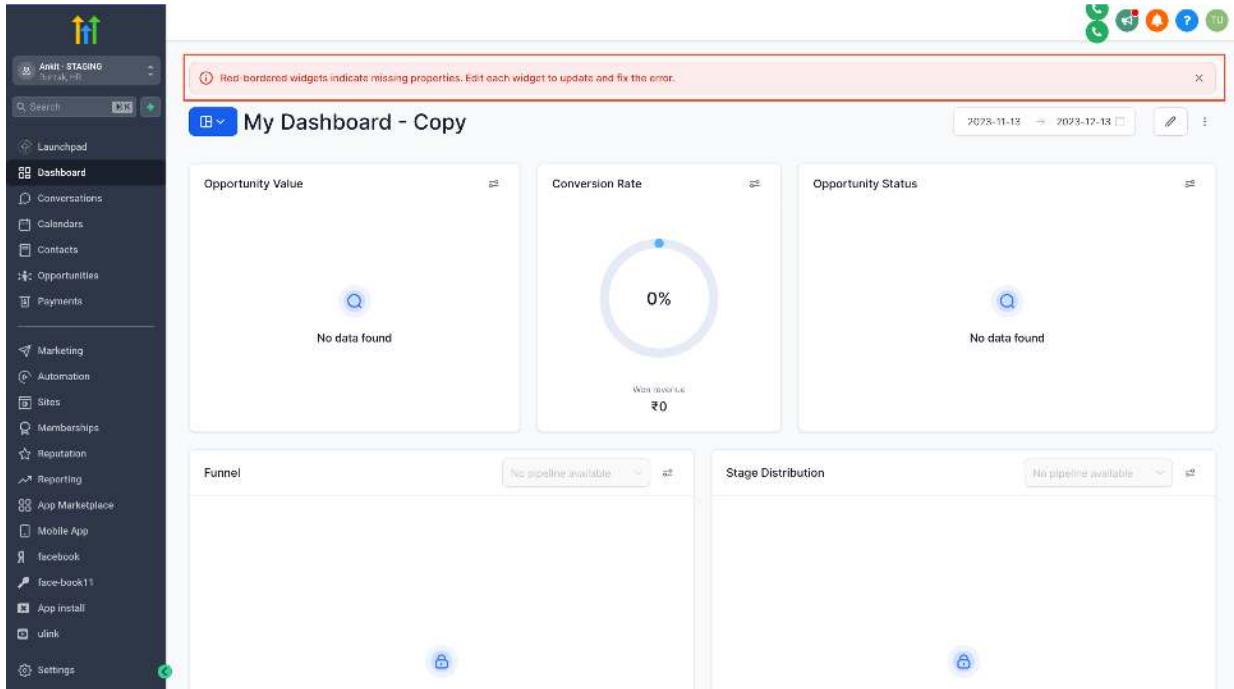
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### Step 5: Click duplicate



- Execute the duplication process.
- Navigate to the new sub-account to view the duplicate dashboard.

### Step 6: Edit widgets with missing custom values



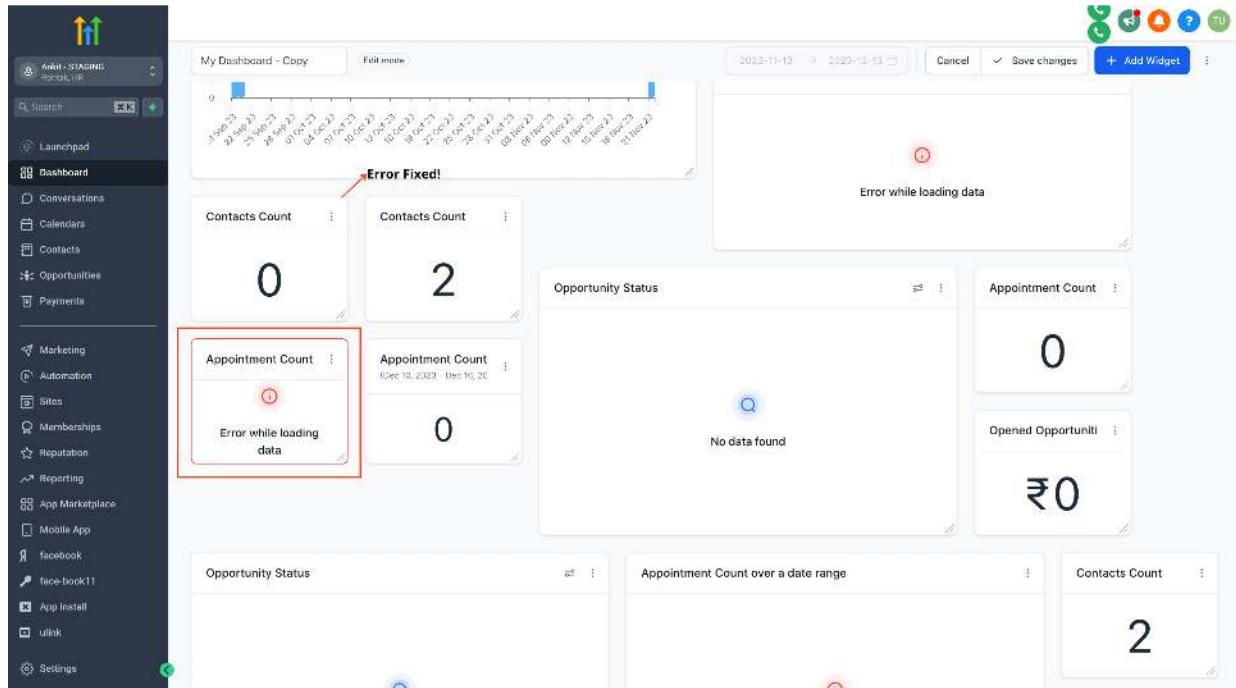
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The screenshot shows a CRM application interface with two main sections: a dashboard view and an edit mode for a specific dashboard.

**Dashboard View:** The top section displays a dashboard titled "My Dashboard - Copy". It includes a date range selector (2023-11-13 to 2023-12-13), a chart, and several data cards. The "Contacts Count" and "Appointment Count" cards both show an error message: "Error while loading data". A red box highlights these two cards, with a red arrow pointing to the text "Widgets in which the properties need to be updated".

**Edit Mode:** The bottom section shows the same dashboard in "Edit mode". A modal dialog is open for the "Contacts Count" card. The dialog has tabs for "Configure" and "Conditions". Under "Conditions", there is a dropdown menu set to "Assigned User" with a search bar. A red box highlights this search bar, with a red arrow pointing to the text "Add the missing value here".

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- If there were any custom values or fields on the original dashboard, those will not be copied to the duplicate, and you will see an error banner informing you about this.
- Widgets where such values and fields are missing will be highlighted in red.
- You can edit those widgets and update the required values and filters.
- Once done, click save, and the error state will disappear

## Step 7: Save changes, and you're ready to roll!

Ensure to save any changes made during the duplication process.

### Note:

Wondering which plan unlocks the customizable multiple Dashboards?

It's currently available exclusively for the \$497 plan and beyond. If you're on the \$97 or \$297 plan, we recommend leveling up to unlock this feature.

Sorry we couldn't be helpful. Help us improve this article with your feedback.