

# CITK

Customizing a widget



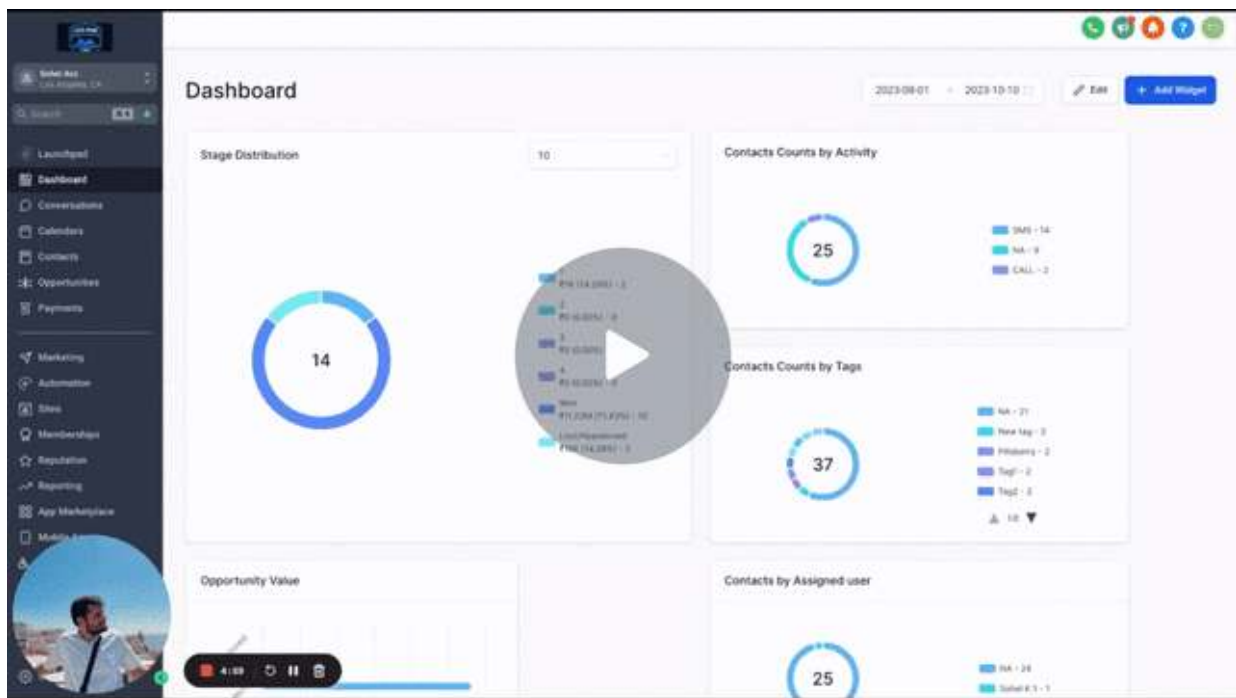
## Customizing a widget

Revamp your widgets with the power to modify conditions, experiment with chart types, introduce fresh filters, and much more. Unleash your creativity and transform your data into captivating insights!

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[Customizing Widgets in the Platform - Watch Video](#)



### Step 1: Choose the widget

# Customizing a widget

The image displays two screenshots of a dashboard interface, illustrating the steps to add and configure a widget.

**Top Screenshot:** The dashboard shows various widgets including Conversion Rate (30%), Opportunity Value (₹11.3M), and a Funnel chart. The 'Add new widget' panel is open on the right, showing a search bar with 'value' entered and a list of widget types under the 'ALL' filter. The 'Show by chart type' section is highlighted with a red box, showing icons for different chart types.

**Bottom Screenshot:** The dashboard is the same, but the 'Add new widget' panel is now in the 'Configure' tab. The 'Show by chart type' section is still highlighted with a red box. The 'Configure' tab shows settings for the 'Opportunity Counts Over Time' widget, including the title, metric (Count of Opportunity), view by (Created on), and breakdown (Daily). The 'Save' button is visible at the bottom.

- Start by choosing a widget from the widget list.
- Under the "ALL" filter, the default chart type is automatically selected for each widget.
- You can change the chart type by clicking on the chart icon.

## Step 2: Configure the widget settings

# Customizing a widget

Title

Opportunity Counts Over Time

Metric

Count

 of 

Opportunity

Group

Status

Status ✓

Assignee

Pipeline

View By

Updated on

Created on

Updated on ✓

Status change

Status

Assignee

Pipeline

Breakdown

Daily

Date Property

Created on

Created on

Updated on

Status change

2023-08-01

→

2023-10-10

Dashboard date range

Yesterday

Today

Tomorrow

This week

Next week

Last week

Last 7 days

Dashboard date range

2023-08-01

→

2023-10-10

# Customizing a widget

The image shows a dashboard interface with a sidebar on the left containing navigation links like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments, Marketing, Automation, Sites, Memberships, Reputation, Reporting, App Marketplace, Mobile App, facebook, facebook11, App install, ulink, and Settings. The main content area displays a 'Dashboard' with a circular progress indicator showing 36, a 'Manual Actions' section with 'Phone' (0) and 'SMS' (6) counts, and a line chart titled 'Opportunity Counts Over Time'. The right panel, titled 'Edit widget', allows customization of the 'Opportunity Counts Over Time' widget. It includes options for chart type, title, metric, view by, and breakdown. The 'Advanced Settings' section, highlighted with a red border, includes 'Date Property' (Created on), 'Date Range Override' (Dashboard date range), and a date range selector set to 2023-08-01 to 2025-12-10. A 'Save' button is at the bottom.

**Dashboard** Edit mode

2023-08-01 → 23

36

Won - 9  
Lost - 4  
Abandoned - 1

₹44

**Manual Actions**

Phone: 0  
SMS: 6

Go to Manual Actions →

**Opportunity Counts Over Time**

04 Aug 23 15 Aug 23 29 Aug 23 06 Sep 23 17 Sep 23 28 Sep 23

**Edit widget** Opportunity Counts Over Time

Show by chart type: #, , , , ,

Configure Conditions

Title: Opportunity Counts Over Time

Metric: Count of Opportunity

View By: Created on Breakdown: Daily

**Advanced Settings**

Date Property: Created on

Date Range Override: Dashboard date range

2023-08-01 → 2025-12-10

Save

- Head to the "Configure" tab to further customize the widget
  - Title : Change the widget's title according to your conditions. A clear title makes it easier for you and your team to understand.
  - Metrics : Switch data points for your widget
  - Group : Define how your results are grouped in a Donut chart.
  - View by : Pick the secondary dimension for line, bar and horizontal bar chart types
  - Breakdown : Modify the frequency of the time period.
  - Date Property : Adjust the date property for fetching results(for example Created Date or Updated Date)
  - Date Range Override : Override the date range for the widget for the selected date property(by default, it uses the global date range from the dashboard).
  - Order : Alter the order of results (ascending or descending).
  - Limit : Set a limit to simplify the displayed results.
- Advanced settings are supplementary configurations that offer extra personalization options for your widget. These settings are not mandatory for creating a widget but can enhance its customization.

### Step 3: Add Conditions

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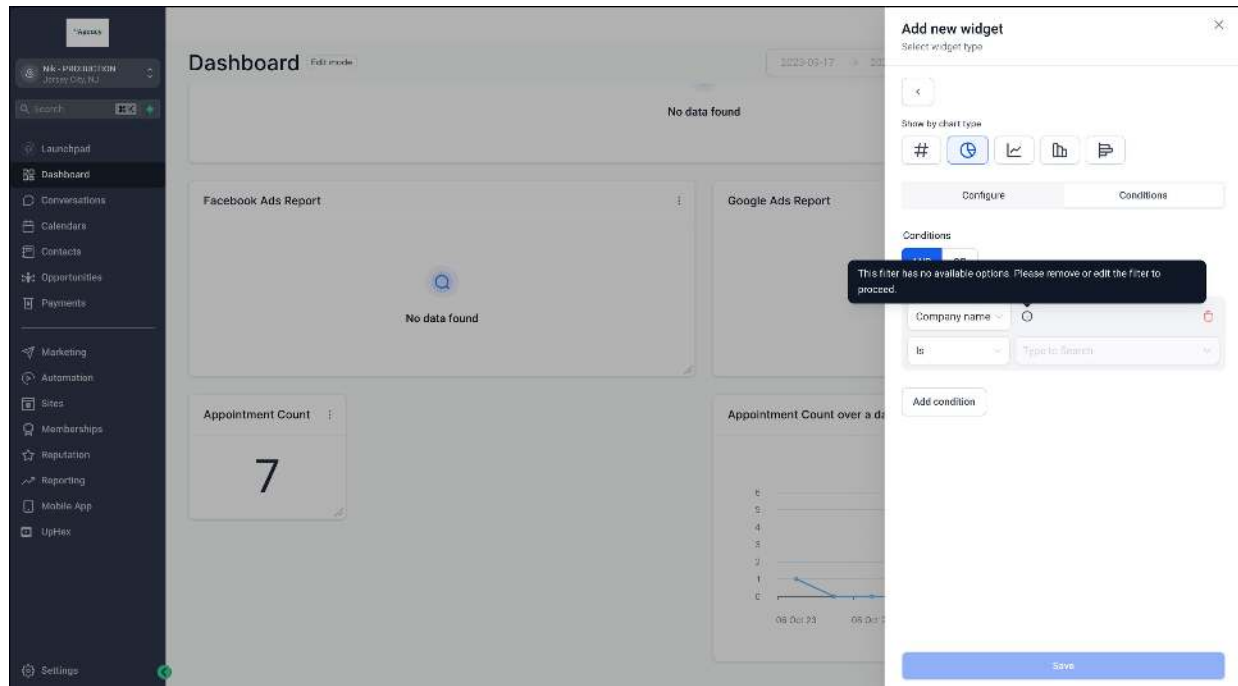
The image displays two screenshots of a dashboard interface, illustrating the process of customizing a widget.

**Top Screenshot:** The dashboard shows a sidebar with navigation options like Launchpad, Dashboard, Conversations, Calendars, Contacts, Opportunities, Payments, Marketing, Automation, Sites, Memberships, Reputation, Reporting, App Marketplace, Mobile App, facebook, facebook11, App install, Ulink, and Settings. The main content area includes a 'Dashboard' section with a circular progress indicator showing 36, a 'Manual Actions' section with a 'Phone' count of 0 and a 'SMS' count of 6, and an 'Opportunity Counts Over Time' line chart. The 'Edit widget' panel is open on the right, showing the 'Opportunity Counts Over Time' widget. The 'Add condition' button is highlighted with a red box.

**Bottom Screenshot:** The dashboard is identical to the top one. The 'Edit widget' panel is open, and the 'Conditions' tab is selected. The 'Conditions' section shows a dropdown menu for 'Status' with options: Open, Won, Lost, and Abandoned. The 'Add condition' button is also visible.



## Customizing a widget



- Under the "Conditions" tab, apply various filters using AND or OR conditions. Here's how:
  - Click "ADD CONDITION" to add a filter and choose the condition from the dropdown.
  - Set the operator and parameters for the filter.
  - You can add or delete conditions as needed.
- Note that if there's no data found for a specific filter, you won't be able to save the widget without either deleting that filter from the condition or changing it.

## Step 4: Save Changes

## Customizing a widget

The top screenshot shows the 'Add new widget' configuration panel. The 'Save' button is highlighted with a red box. The bottom screenshot shows the updated dashboard with the 'Opportunity Counts Over Time' widget. The 'Save changes' button is highlighted with a red box.

**Dashboard Overview:**

- Conversion Rate:** 30% (₹11.24M)
- Opportunity Value:** ₹11.3M
- Funnel:** 10 (Cumulative: 100.00%, Next Step Conversion: 100.00%)
- Stage Distribution:** 14

**Manual Actions:**

Photo	SMS	Total Pending
0	6	6

**Opportunity Counts Over Time:**

Line chart showing opportunity counts over time (01 Aug 23 to 28 Sep 23). The chart shows a fluctuating trend with peaks around 15 Aug 23, 26 Aug 23, 17 Sep 23, and 28 Sep 23.

- After making all the required changes, click the "Save" button.
- The widget will be updated on your dashboard. You can resize and reposition it as desired. Remember to click "Save Changes" once you're content with the widget's position and size.