

CTK

Customizing a widget



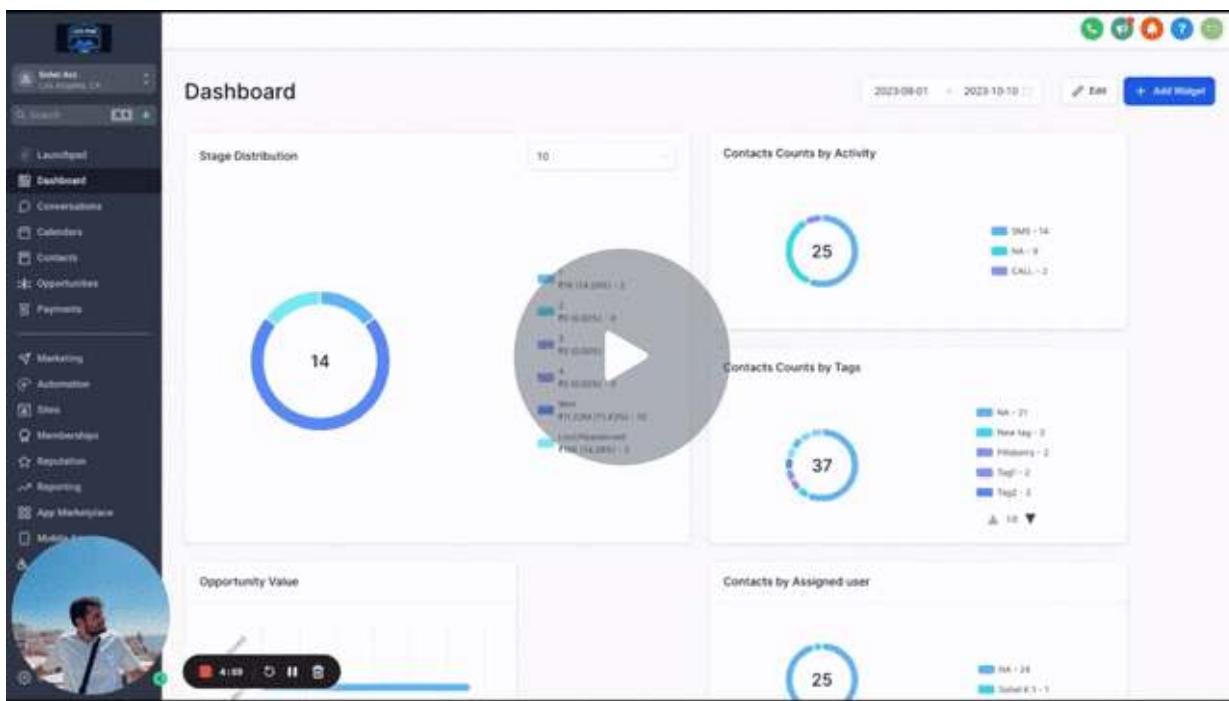
Customizing a widget

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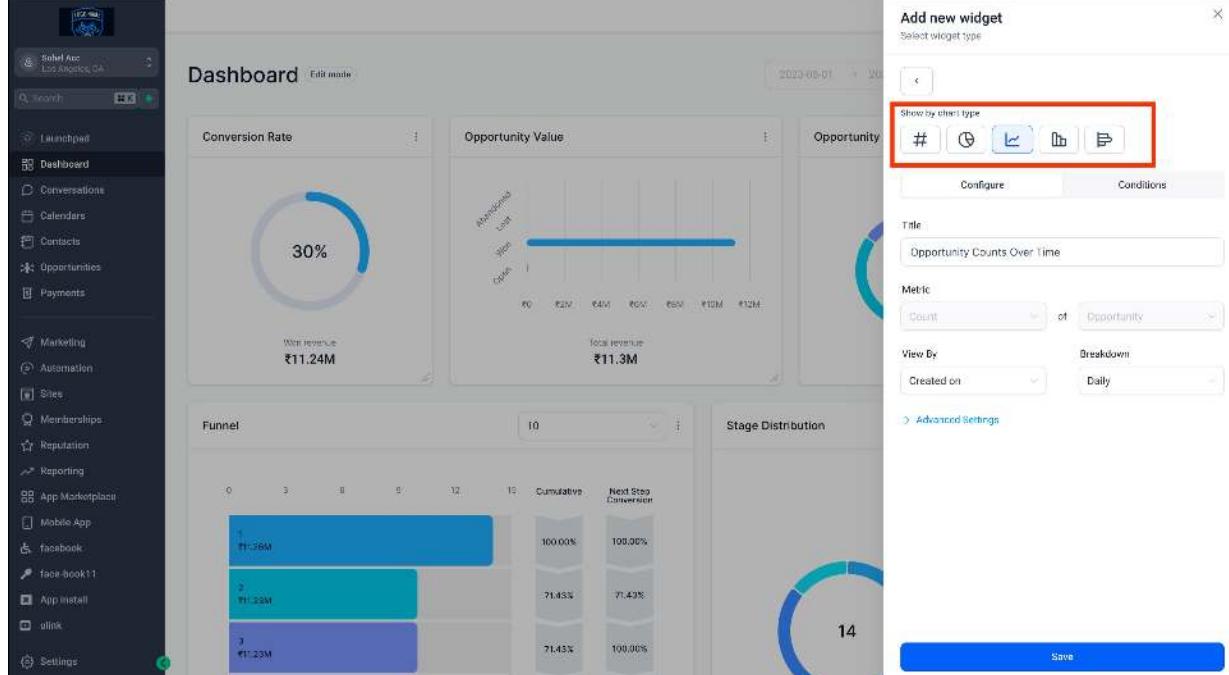
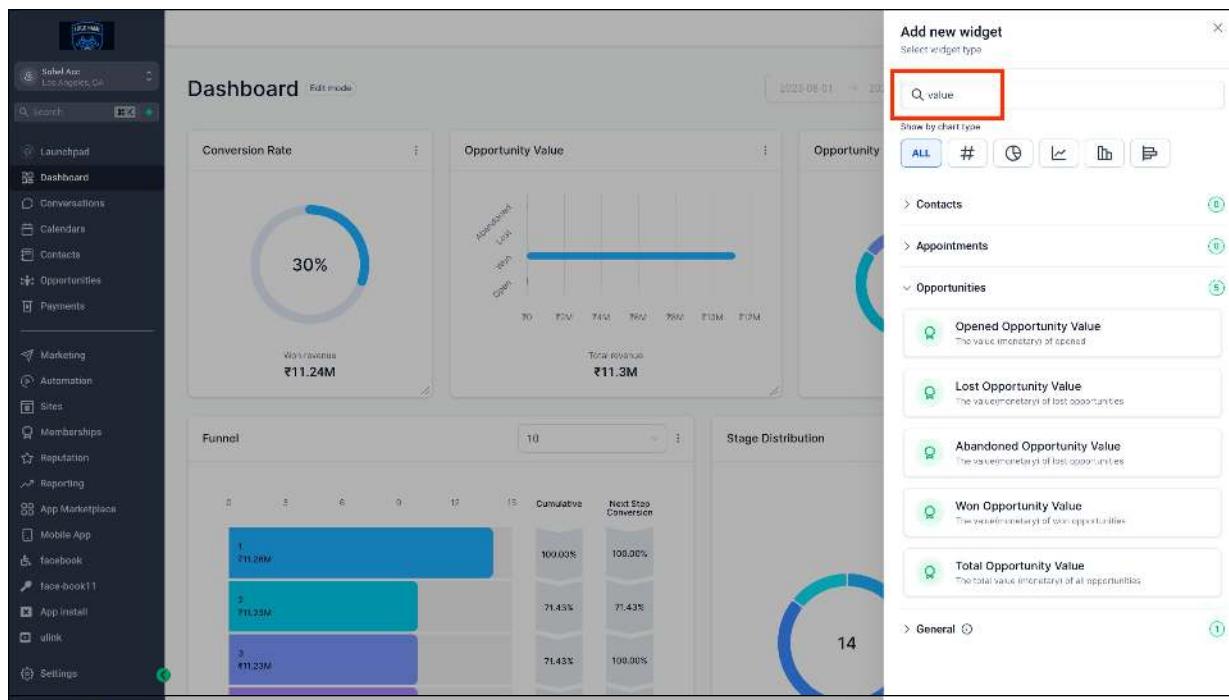
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[Customizing Widgets in the Platform - Watch Video](#)



Step 1: Choose the widget

Customizing a widget



The screenshot shows a dashboard interface with a sidebar on the left containing various navigation items. The main area displays several widgets: a Conversion Rate (30%), Opportunity Value (₹11.24M), a Funnel chart, and a Stage Distribution chart. On the right, a modal window titled 'Add new widget' is open, allowing users to select a widget type. The 'Show by chart type' section includes a 'ALL' filter and other options like '#', '# (Count)', and 'Value'. The 'Opportunities' section is expanded, showing various metrics like 'Opened Opportunity Value', 'Lost Opportunity Value', and 'Total Opportunity Value'. The second screenshot shows the same dashboard after a configuration change, where the 'Show by chart type' section now has the '# (Count)' filter selected.

- 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

Customizing a widget

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

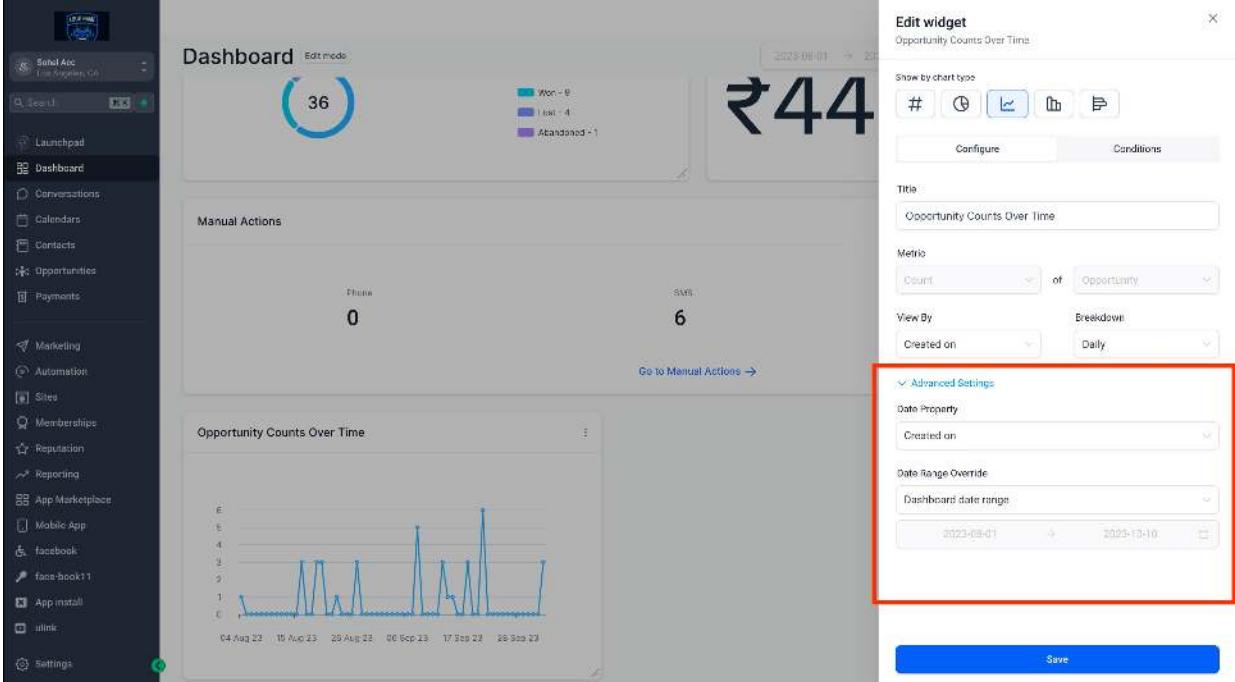
2023-08-01

→

2023-10-10



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The screenshot shows a dashboard interface with a sidebar on the left containing various navigation items. The main area displays a summary section with a large number '36' and a chart showing '₹44'. Below this is a 'Manual Actions' section with two buttons: 'Phone' (0) and 'SMS' (6). A link 'Go to Manual Actions →' is present. To the right, a chart titled 'Opportunity Counts Over Time' is shown, with a data table below it:

Date	Count
04-Aug-23	1
11-Aug-23	2
18-Aug-23	3
25-Aug-23	1
01-Sep-23	5
08-Sep-23	1
15-Sep-23	6
22-Sep-23	1
29-Sep-23	2

On the right, an 'Edit widget' dialog is open for the 'Opportunity Counts Over Time' chart. The 'Advanced Settings' section is highlighted with a red box. It contains the following fields:

- Date Property:** Created on
- Date Range Override:** Dashboard date range (2023-08-01 to 2023-10-10)

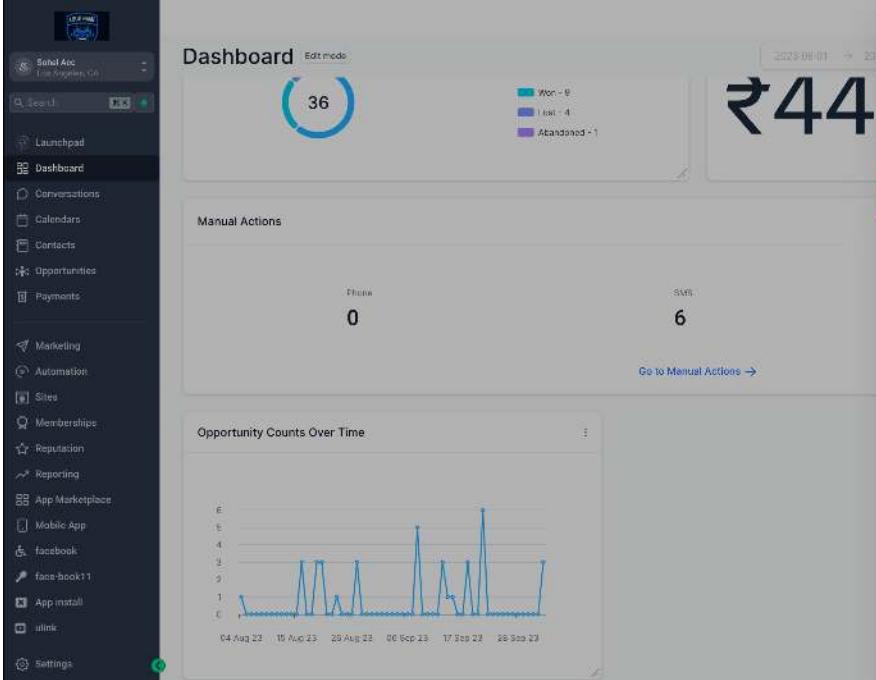
A 'Save' button is located at the bottom right of the dialog.

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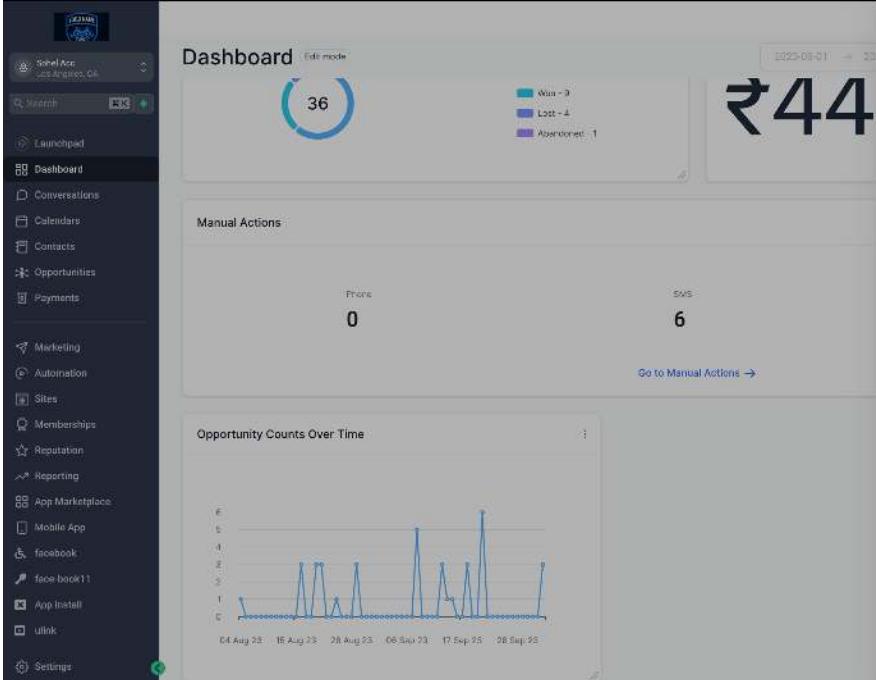
- Head to the "Configure" tab to further customize the widget
 - Title : Change the widget's title according to your conditions. A clear title makes it easier for you and your team to understand.
 - Metrics : Switch data points for your widget
 - Group : Define how your results are grouped in a Donut 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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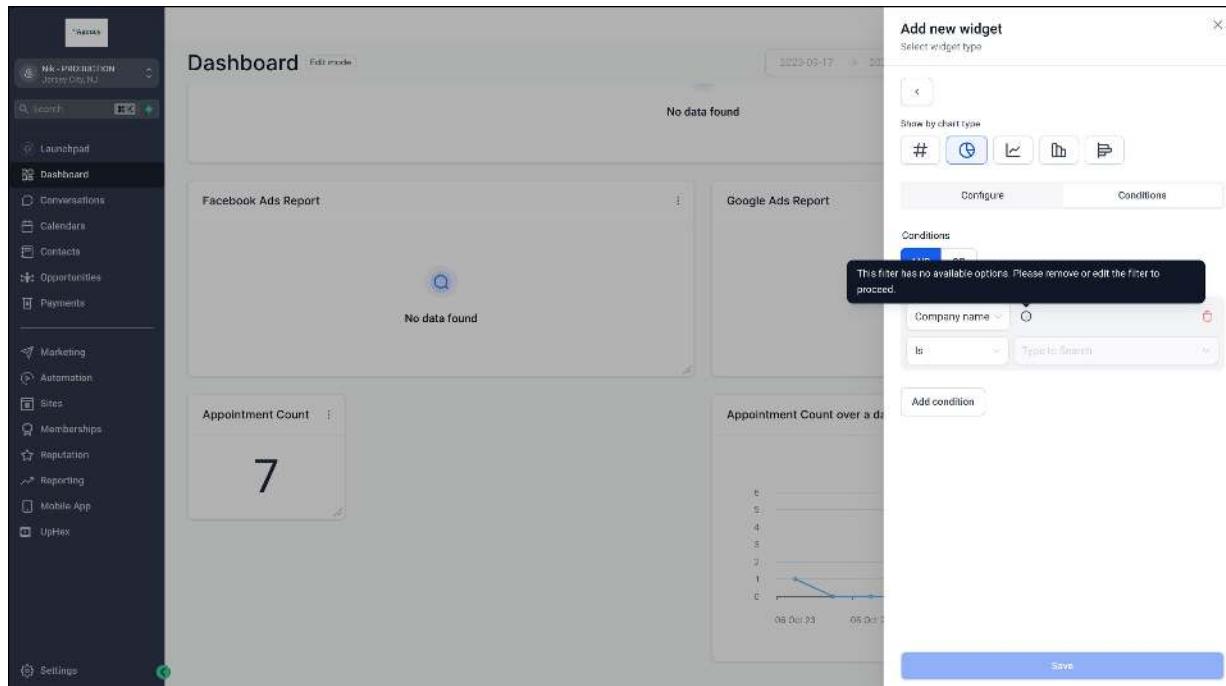


The screenshot shows a dashboard with a chart titled 'Opportunity Counts Over Time'. The chart displays data points for different days, with a significant peak around August 28th. The edit mode overlay for this chart is open, showing the 'Conditions' tab. A red box highlights the 'Add condition' button, which is used to filter the data shown in the chart.



The screenshot shows the same dashboard after applying a condition. The 'Conditions' tab in the edit mode overlay is set to 'AND' and shows a single condition: 'Status: Won'. The chart now only displays data for 'Won' opportunities, showing a much smaller peak around August 28th.

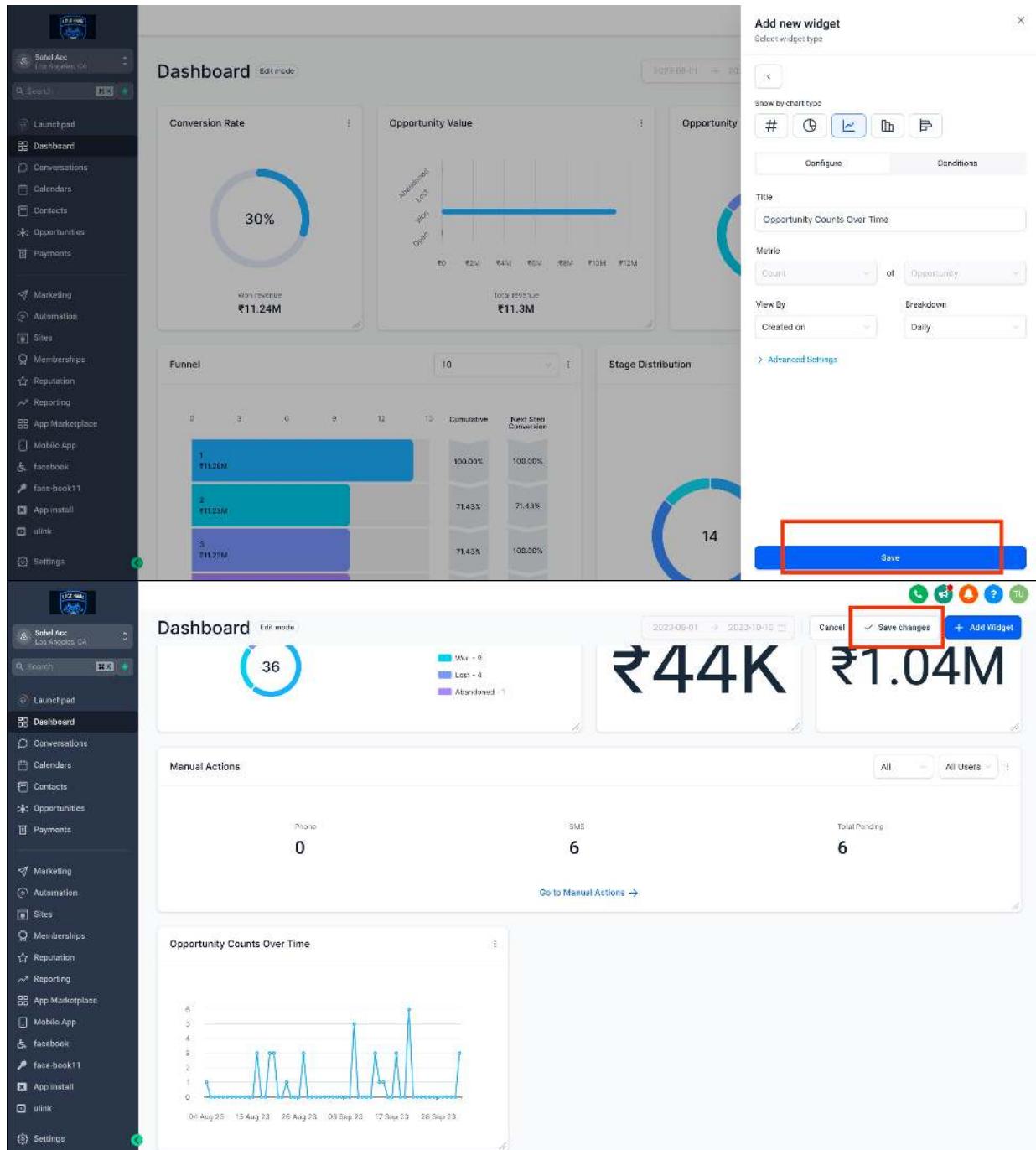
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- Under the "Conditions" tab, apply various filters using AND or OR conditions. Here's how:
 - Click "ADD CONDITION" to add a filter and choose the condition from the dropdown.
 - Set the operator and parameters for the filter.
 - You can add or delete 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 image displays two versions of a dashboard interface, likely from a software like HubSpot. The top half shows the 'Add new widget' configuration screen, and the bottom half shows the resulting dashboard layout.

Top Section (Add new widget):

- Title:** Opportunity Counts Over Time
- Metric:** Count of Opportunity
- View By:** Created on (Daily)
- Conditions:** None
- Save** button highlighted with a red box.

Bottom Section (Dashboard Layout):

- Manual Actions:** Shows 0 phone calls and 6 SMS messages.
- Opportunity Counts Over Time:** A line chart showing counts over time from 01 Aug 23 to 28 Sep 23. The chart shows several spikes, with a major peak around 15 Sep 23 reaching a value of 6.
- Summary Metrics:** Two large boxes on the right: ₹44K and ₹1.04M.
- Save changes** button highlighted with a red box.

- 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.