



INDITION DASHBOARDS

Indition Dashboards Feature List

Indition Dashboards brings permitted business data into configurable summaries, charts, record tables and maps. Staff can build personal dashboards, publishers can assign layouts to roles, and scheduled delivery can send rendered reports by email or basic statistics by SMS.



POWERED BY AI

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Indition Dashboards brings analysis and Indition AI into the same workspace. Build with permitted business data, ask AI for a first draft or a widget change, inspect the underlying records, and share the finished results.



Wherever you see this mark, that feature uses Indition AI. AI can propose dashboard and widget settings or explain supported aggregate results. You review proposed settings before applying and saving them. Availability depends on the site's AI settings, provider readiness and your permissions; manual Dashboard building remains available without AI.

FROM A BUSINESS QUESTION TO A DASHBOARD DRAFT

Describe what you need. Review the dashboard it builds.

Create a whole dashboard. In New Dashboard, describe the subject, period and questions, then choose Create with AI. The proposed board opens as an unsaved draft using sources in your permitted catalog.

Design or revise a widget. Describe the figure or chart you want, or request a change to an existing widget. Build it fills the ordinary editor so you can inspect the source, measure, dates and conditions.

Explain an eligible result. Explain this result produces supported observations from bounded aggregate evidence. It does not prove why a change happened. Inspect matching records when you need to understand the underlying work.

This pack describes the Dashboard product. Available sources depend on installed modules, enabled API tables and the current user's permissions.

Dashboard building

- Personal dashboards with names, defaults and editable widget layouts.
- Published role templates with draft changes, version history and restore as a new published version.
- Ready-made dashboards from available providers, including Central Records starters for API tables.
- Five display types: Data Summary, Chart, Data Table, Activity List and Text / Notes.
- Data selection before display selection, with independently collapsible editor sections.
- A closed-by-default Live preview section, with automatic or manual refresh while open.
- Up to 40 widgets per dashboard and up to eight series per supported widget.

Measures and conditions

Record counts and permitted numeric measures can be combined into sums, differences, ratios and percentages. Summary targets show progress toward a configured positive target. Saved metrics reuse a named source, measure and conditions across widgets.

Conditions support typed comparisons, named relationship values and nested All/Any groups. Searchable multi-selects let a user include several statuses or exclude Cancelled and Declined together. Dashboard filters can reach compatible fields in several sources; saved views retain useful combinations of dates and filters.

Time and visual analysis

Date ranges include rolling windows, current calendar periods and complete preceding periods. Last 24 hours uses chronological hourly buckets for time charts. Eligible summaries and time charts can compare with a previous period.

Charts include columns, horizontal bars, lines, area, mixed styles, stacked columns, pie, donut, workflow funnel and supported US state maps. Aging breakdowns and overdue record sources help track outstanding work. A funnel compares configured stage counts; it does not prove that the same records moved between stages.

API data and maps

API sources query the configured API data connection, normally apiSource. Only enabled tables are considered. PII masking, allowed fields and current read permissions still apply. API Relationships supplies missing foreign-key relationships and compound readable labels. Dashboard Fields supplies business names, number formats, geographic field roles and optional freshness checks.

Maps can use a related address source to show record locations. Selecting a state zooms into it. ZIP regions, permitted coordinate pins, clustering, loaded-record search and matching record drill-downs add detail. Explicit address geocoding is optional and disabled until configured.

Export and delivery

Every Dashboard data table offers XLSX export through Xpress's Excel writer. Displayed exports retain local filtering and sort order. Record drill-downs additionally offer the complete filtered result within the documented export limits. Technical IDs and UUIDs remain hidden.

Actions / Download PDF captures the current dashboard presentation, including charts, map zoom and displayed table rows. Scheduled email contains rendered charts and an attached PDF. Scheduled SMS contains basic statistics and an expiring direct PDF link. Schedules support daily, weekly and monthly cadence, saved views, recipient-specific views and threshold or percentage-change rules.

Access and operation

Source permissions are checked when data is requested. Schedule runs use the active owner's permissions. Publishing requires an explicit publisher capability. API configuration screens remain superadmin-only by default and have registered routes for later delegation.

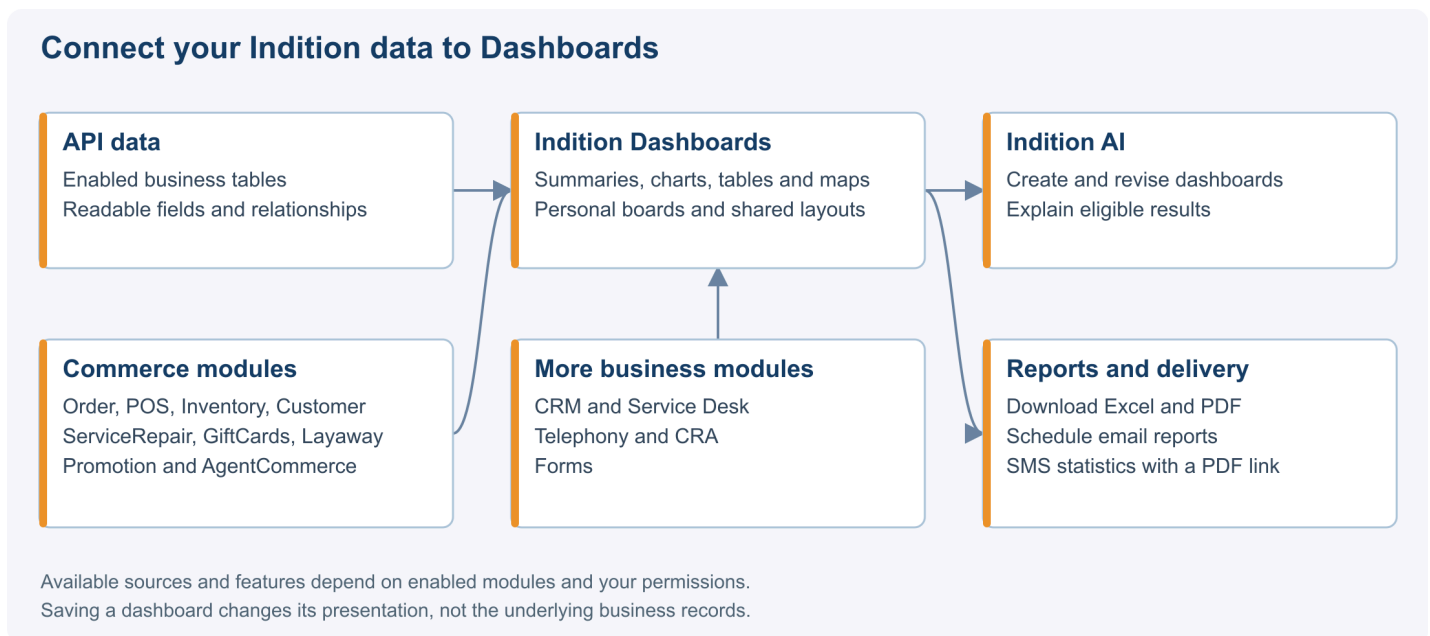
Result caching, shared schema discovery and request-local authorization caching reduce repeated work. Widget errors, refresh information, optional source freshness and delivery logs help distinguish a real zero from unavailable or stale data.

Integration with Indition AI and other modules

AiCore enables dashboard creation/editing assistance and aggregate result explanations when the corresponding native features and provider are configured. Messaging enables transport. Other modules contribute their own permitted sources; a standalone API environment does not require Shop to use API dashboards.

Indition AI feature coverage

Whole-dashboard assistance turns a business description into a validated unsaved board using the current user's catalog. Widget assistance can design a new card or revise an existing one. Aggregate explanation selects supported observations about eligible results without inventing causes. Each capability can be enabled separately through native AI Settings and requires Use AI permission and provider readiness.



Dashboard integration with the wider Indition platform

Design requests carry the permitted catalog and prompt text rather than computed figures. Explanation requests carry bounded aggregate evidence rather than individual rows, addresses or category values. AiCore supplies model selection, limits and usage accounting. Manual Dashboard operation remains available without AI.

Reuse and rollout

Saved views retain owner and location scoped dates and shared filters. Saved metrics reuse source, measure and criteria; shared definitions require publishing capability. Template import and export transfer editable definitions for compatibility review. Central administration can preview and deliver template drafts to supported destination instances, which publish them independently.

Location enablement controls whether Dashboard replaces the area's previous landing page. Role priority and customization policy support managed defaults alongside personal boards. Current source access is enforced after publication and on scheduled report evaluation.