



INDITION DASHBOARDS

Indition Dashboards Marketing Overview

Indition Dashboards helps teams turn the business data they can access into a daily working view. A board can combine headline figures, trends, records and geographic detail, then deliver a rendered report on a schedule.



POWERED BY AI

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Start with the business question. Describe the dashboard you want, ask Indition AI to propose its layout and widgets, then refine the result using your permitted sources. Keep charts, records, maps and recurring reports together in one working space.



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 overview describes the Dashboard product. Available data depends on the modules, tables and permissions configured for each environment.

Start with the business question

A useful dashboard answers a question: How many tasks are still open? Which work is overdue? Where are today's records? How does this month compare with the previous period?

Users choose the data source and measure before choosing the display. Named condition lists make status restrictions readable, and collapsible sections keep the editor manageable. A summary can track a total or a calculated percentage; a chart can show a trend or category split; a table can expose the records behind a figure.

Bring API data into the workspace

A standalone API environment can build dashboards from its configured source database. Administrators choose which API tables are enabled, add business labels and describe relationships that the database does not declare through foreign keys.



Central Records turns the important tables into editable starting layouts with totals, trends and records. A team can start from those layouts and build views for transactions, tasks, accounts or its own subjects without installing commerce modules merely to use the Dashboard.

Relationships turn stored keys into useful names. A user can select Cancelled and Declined from a list to exclude both, instead of guessing status codes. Compound labels such as Name, City and Region make related records easier to identify.

Connect figures to the work behind them

Eligible charts and summaries open matching records. Shared filters narrow related sources together. Saved metrics reuse a definition such as Open records, and saved views retain useful dates and filters.

Aging and overdue widgets help show work that needs attention. Workflow funnels compare configured stage counts. Teams should still use a dedicated business report when they need tracked conversions, complex analysis or unrestricted detail beyond the Dashboard's bounded views.

Put geography into context

US state maps can show the distribution of permitted records through a related address source. Clicking a state zooms into that state; configured coordinates add location pins and clustering. Record links connect the map to its underlying work.

Existing coordinates work without external lookup. Optional explicit geocoding helps locate missing addresses when a provider is configured. It does not automatically send the whole source dataset during page load.

Share the presentation or analyze the rows

Actions / Download PDF captures the current board, including chart styles, focused maps and visible table rows. Excel exports cover Dashboard data tables and drill-downs, preserving local filters and sort order. The complete filtered record export is a separate choice, so a small preview is not mistaken for a full result.

Scheduled email includes rendered charts and a PDF. SMS provides basic statistics and an expiring PDF link. A schedule can use saved views for recipient-specific reports or send when a summary meets a threshold.

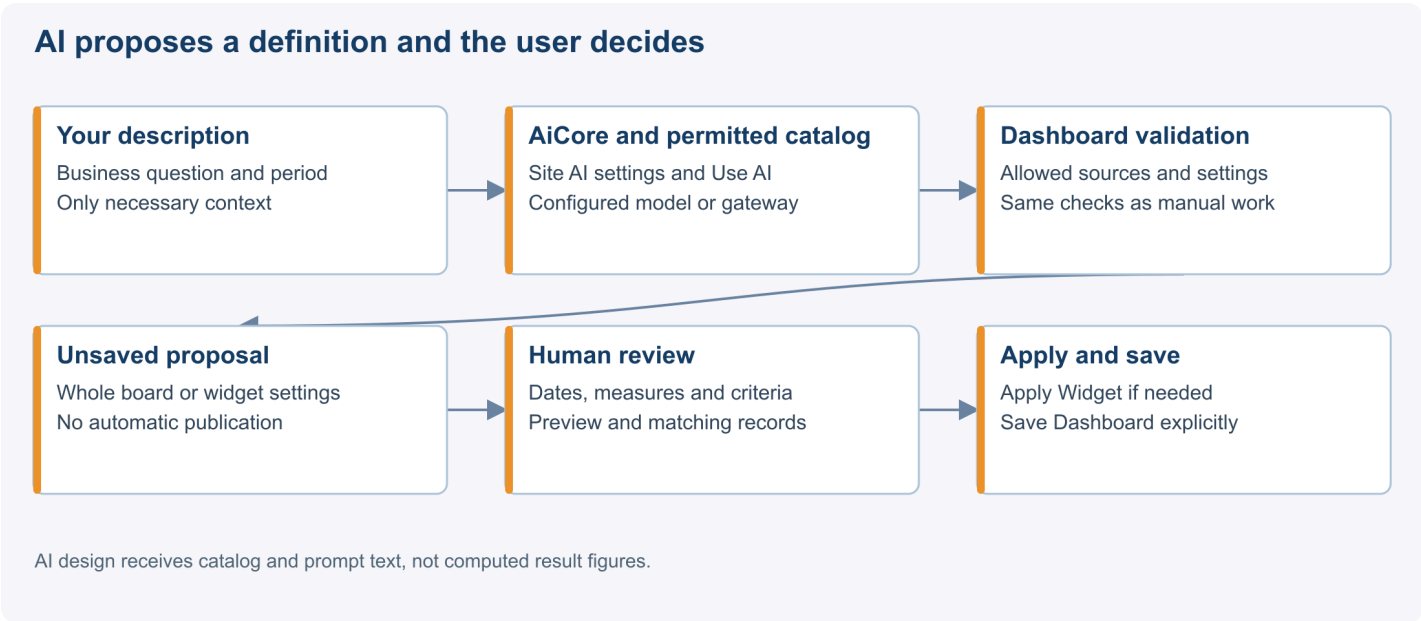
Keep definitions and access under control

Publishers can maintain versioned role templates while staff keep personal copies. Data availability follows current access and enabled table selection. Scheduled reports use their active owner's permissions and current source policy.

Optional AI explanations focus on bounded aggregate evidence. Refresh information, source freshness checks and delivery history help users decide whether a result is ready to act on. These capabilities support a more useful daily workspace without claiming that a dashboard replaces every report or operational system.

Build with Indition AI and keep control of the result

Describe a whole dashboard in business language or ask AI to create or revise a single widget. Indition AI selects from the sources the user can access and returns settings that Dashboard validates. The user reviews dates, criteria, measures and presentation before saving. It supports a faster starting point without automatically changing shared layouts or business records.



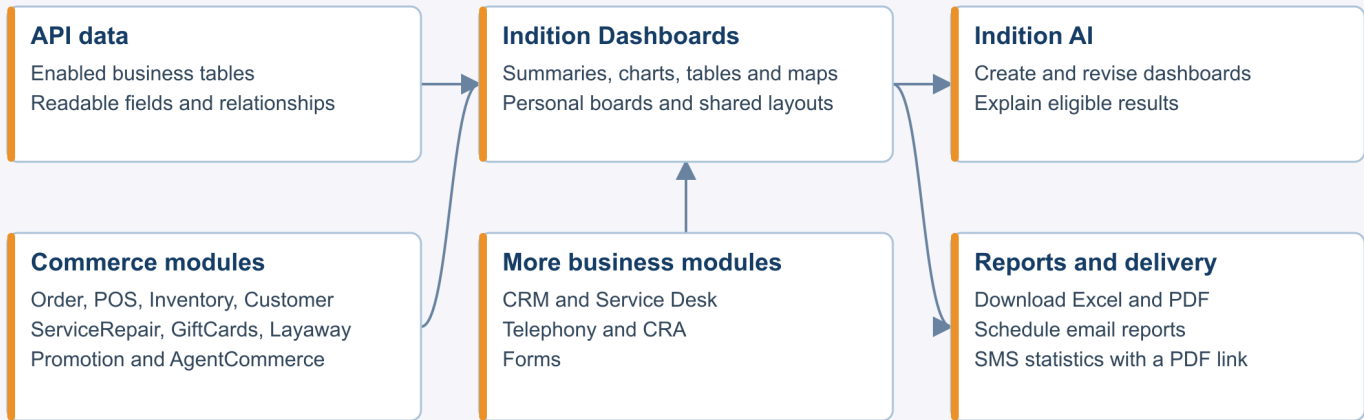
Indition AI moves from description to a reviewed dashboard

Eligible result explanations offer supported observations about figures and comparisons. They describe differences without inventing causes. Native AiCore settings control feature availability, provider selection, access and usage limits. Each environment can adopt the AI capabilities appropriate to its users and data.

Connect analysis to the rest of Indition

API sources provide enabled business tables with relationships, readable names and masking. Optional business modules contribute their own providers. Messaging delivers scheduled reports. Native Xpress services generate Excel workbooks, while Dashboard PDF preserves the board's current presentation. These integrations keep analysis within the same application and permission model as the user's business work.

Connect your Indition data to Dashboards



Available sources and features depend on enabled modules and your permissions.
Saving a dashboard changes its presentation, not the underlying business records.

Dashboards in the Indition module ecosystem

The full documentation includes an illustrated operating manual, administrator setup, technical integration reference and practical FAQ. Worked examples cover multi-status exclusions, calculated KPIs, geographic maps, AI design and recurring delivery.