



INDITION DASHBOARDS

Indition Dashboards User Manual

Use this manual to build dashboards that answer business questions, investigate the records behind a result and share information with colleagues. It explains the complete Dashboard workflow, including Indition AI assistance, API data, maps, Excel and PDF downloads, scheduled email and SMS, and published role templates. Examples use illustrative business subjects and sample records. Your available sources and controls depend on your permissions and the modules configured on your site.



POWERED BY AI

September 2026



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Describe the dashboard you need in ordinary business language. Indition AI can draft a whole board, design or revise a widget, and help you interpret an eligible result. Work with your permitted data sources, inspect the proposed dates and conditions, then save the dashboard you want. The same workspace supports manual building, drill-downs, maps, Excel and PDF downloads, and scheduled delivery.



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.

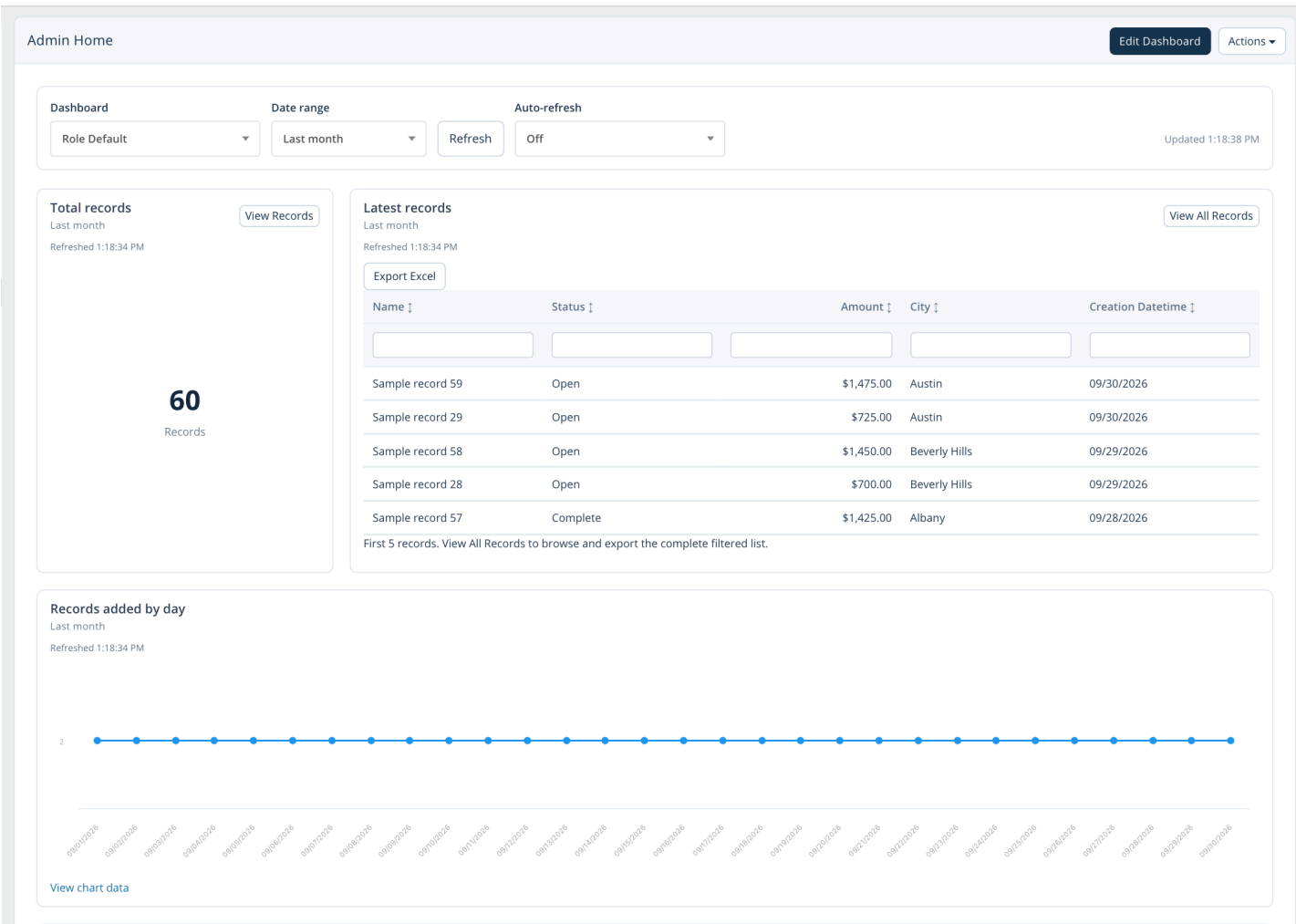
Explain an eligible result. Explain this result produces supported observations from bounded aggregate evidence. It does not prove why a change happened. Inspect matching records when you need to understand the underlying work.

1 - Understand your dashboard workspace

Indition Dashboards combines figures, charts, tables, maps and explanatory text into a workspace. A dashboard is a saved definition of what to show. It reads current permitted data when you open or refresh it; it is not a separate copy of the source database. A saved definition can continue to show new records without being edited every day.

Open Dashboards / My Dashboards. Where your administrator has enabled Dashboard for Admin Home, you can also start from the main admin landing page. The Dashboard selector lists available personal dashboards, published dashboards and ready-made dashboards contributed by installed modules. A location identifies the area of the application in which the dashboard belongs. Some sites have only Admin Home; others have additional module locations.

The top toolbar controls the selected dashboard, its date range and refresh behavior. Shared filters appear below it when the dashboard has them. The title bar offers Customize or Edit Dashboard and an Actions menu. Actions vary with the dashboard state and your permissions. For example, template management requires publishing permission, and delivery requires a saved dashboard and configured notification channels.



Dashboard workspace with sample development records

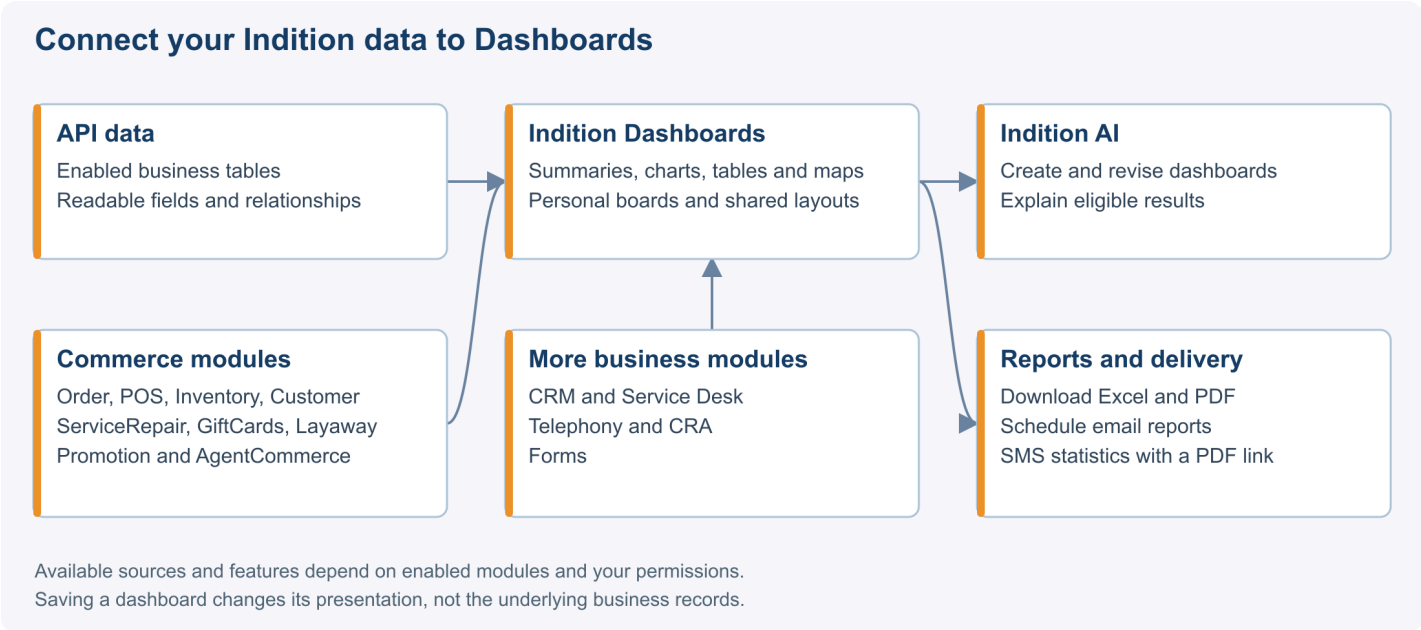
The illustration shows sample development data, including a record-count summary, a record table and a daily trend chart. It demonstrates the relationship between the top filters and the widgets below. Names, figures and available controls will differ on your site.

A widget is one card. Its title should state the business question, such as Open Records or Completed Repairs This Month. The period displayed beneath a title matters: two cards can deliberately use different periods. Refresh information records when a result was evaluated. A source freshness warning refers to the age of the underlying data and is a separate signal.

Choose one question for each widget. A board designed for daily operations planning needs different figures from a quarterly management review. Use a small set of decision-focused cards, then add detail through drill-downs rather than trying to put every field on the landing page.

2 - How Dashboards connects to Indition

Dashboards brings data from your enabled Indition modules into one workspace. The builder offers the sources, measures and fields available to your account. An API-only installation can provide useful dashboards without a commerce module.



How Dashboard works with other Indition modules

API makes enabled tables from the configured source database available to Dashboard. API table selection, field restrictions, PII masking and read permissions continue to apply. Adding a widget does not make an unavailable table readable. Relationships and business field descriptions configured in API can provide readable labels and geographic field choices.

Indition AI supplies optional assistance. It lets an authorized user describe a whole dashboard, describe or revise a widget, and request observations about an eligible result. Dashboard checks AI-generated settings before displaying them. Chapters 16 through 18 explain these workflows and their different data boundaries.

Scheduled delivery sends rendered reports by email or basic statistics with a PDF link by SMS. You can also download Dashboard tables as Excel workbooks. Availability depends on the features enabled for your site and your account's permissions.

Modules that contribute Dashboard data

The following module integrations supply sources to the Dashboard catalog. Each appears only when installed, enabled and permitted. The list describes supported integrations across Indition; it is not a requirement to install every business module.

MODULE	DATA AND DASHBOARD CONTRIBUTION
Admin	Dashboard workspace, validation, personal layouts, role templates, saved views and metrics; permitted My Quick Links activity source

MODULE	DATA AND DASHBOARD CONTRIBUTION
Api	Enabled tables on the API data connection, safe scalar measures, conditions, readable relationships, Central Records starters and configured geographic sources
Shop / Order	Orders and sales, product/vendor/category/delivery-method analysis, and supported state/postcode geographic sources
Shop / POS	POS quotes and register-session analysis
Shop / Inventory	Purchase orders, stock on hand and inventory-location analysis
Shop / Customer	Customer records and customer-growth analysis
Shop / ServiceRepair	Work orders, repair quotes and service/repair operations
Shop / GiftCards	Gift cards and gift-card activity
Shop / Layaway	Layaway plans and related operational measures
Shop / Promotion	Discounts and coupon activity
Shop / AgentCommerce	Shopping-agent requests, checkout activity, geographic breakdowns and agent usage
CRM	Reporting from permitted CRM data
Service Desk	Reporting from permitted Service Desk data
Telephony	Reporting from permitted Telephony data
CRA	Reporting from permitted CRA data
Forms	Reporting from permitted Forms data

The commerce modules are optional for an API-only site. Each module contributes its available, permitted sources; the choices on your site depend on which modules and features are enabled.

Saving a dashboard stores its layout and configuration. It does not change the transactions, tasks or other business records that the dashboard displays.

When a choice is missing, identify the responsible layer. A missing table normally needs API selection or read access. A missing AI button needs AI availability or permission. A failed email needs delivery settings or transport investigation. Changing a chart style cannot repair any of those configuration problems.

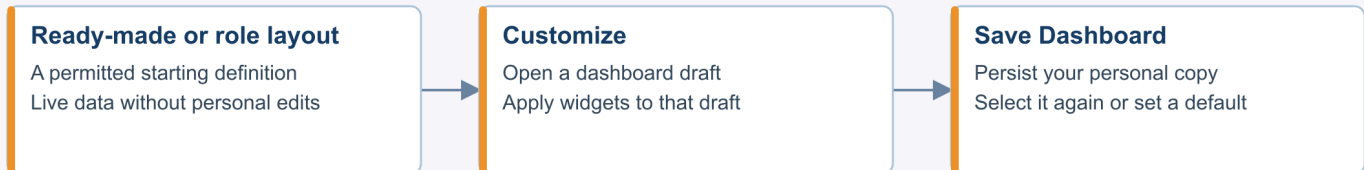
3 - Choose a starting point and manage your copy

Open Actions / New Dashboard. You can start from a ready-made dashboard, begin with a blank board, or use Create with AI when enabled. A ready-made dashboard is a starting definition contributed by a provider. Selecting one can show live data before you save a personal copy. Customize opens an editable draft.

Name the dashboard for its purpose and audience. Operations Overview, Transaction Review and Activity Monitor distinguish three different boards. A shared generic name makes it difficult to select the right dashboard or identify a downloaded file. The name also appears in exported dashboard filenames.

Personal dashboards belong to you. A published role template is a shared starting layout maintained by a publisher. Customizing a role dashboard creates or edits your personal copy where customization is allowed. It does not silently change every other user's board. Some role templates deliberately prohibit personal customization.

Choose a starting layout and save your own work



Personal edits do not publish changes to other users. Role publication is a separate action.

From starting layout to personal dashboard and published template

Apply Widget places a widget into the current dashboard draft. Save Dashboard persists that draft. These are two separate actions. If you apply three widgets and leave without saving the dashboard, those draft changes are not the same as a saved personal board. Cancel discards dashboard edits after the applicable confirmation.

Use Actions / Set as My Default to select a personal landing dashboard. Restore Role Default returns to the role-selected dashboard without deleting your personal board. You can later select that personal dashboard again. A publisher updating the original template does not overwrite a customized personal copy; the builder can indicate that a newer template version is available.

Delete Dashboard is for removing an eligible personal dashboard. Before deleting a board used by a schedule, review the schedule and the impact on delivery. A downloadable PDF or spreadsheet is an output artifact, not a backup of the editable dashboard definition. Template transfer is a separate workflow described in chapter 22.

4 - Build your first dashboard manually

This walkthrough creates an illustrative Operations Overview dashboard with a count, a daily trend and a record table. It assumes your site has an enabled Records source. Substitute an available business source if Records is not listed.

1. Open Actions / New Dashboard and choose Start with a blank dashboard.
2. Enter Operations Overview as the dashboard name and choose This month in the toolbar.
3. Choose Add Widget. If the AI description is offered, choose Create Manually for this walkthrough.
4. In Data source & measures, select the Records source and Records count. Read the source description and identify its date field.
5. In Display, enter Records Added This Month, select Data Summary, choose a suitable width and set Date range to Follow dashboard.
6. Open Live preview to inspect the count. Close the preview when finished, then choose Apply Widget.
7. Add a second widget using the same source and measure. Select Chart, Lines and Day grouping. Name it Records Added by Day and apply it.
8. Add a third widget using the source and Data Table. Select the readable record columns you need and apply it.
9. Arrange the cards, then choose Save Dashboard.

Build a dashboard around a business question

Choose the question

What needs a decision?
Select a business source

Define the result

Choose a measure and date
Apply business conditions

Choose the display

Summary, chart or table
Preview and inspect records

Apply Widget updates the draft. Save Dashboard persists the complete board.

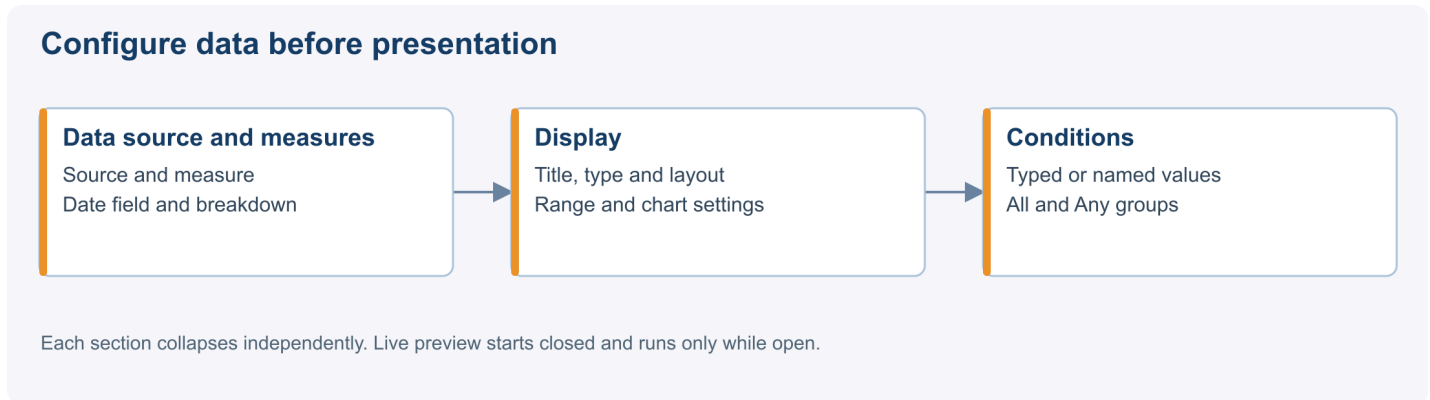
Manual building sequence

The first card answers how many records match. The line chart answers when those records occurred. The table provides enough detail to recognize them. Because all three follow the dashboard period and use the same source date, their relationship is easier to understand. A separate snapshot source or a different date field can legitimately produce different totals.

Open View Records from the count to verify a few matching records. This is a useful acceptance check before sharing a board. Do the records belong to the intended month? Are cancelled records supposed to count? Does the source date represent creation, update or completion? If the business question is wrong, edit the source, date field or conditions before changing colors.

5 - Configure widgets and arrange the layout

The widget editor starts with Data source & measures, followed by Display and Conditions. Each section can collapse independently. Select the source first because it determines the measures, date fields, record columns, breakdowns and map capabilities available to the display.



The widget editor workflow and its collapsible sections

Choose Display according to the decision you want to support. Data Summary presents a figure or calculated KPI. Chart shows a trend or category comparison. Data Table presents readable records or ranked category results. Activity List shows a short list from providers that support it. Text / Notes provides instructions or context; it is useful for explaining a KPI definition or who owns an operational process.

Width choices range from one sixth of the board to full width. Several small summaries can share a row, while a map or detailed table usually needs more space. Height controls the card's working area within its allowed range. Avoid giving a narrow card a long table with many selected columns. Reduce the columns or widen the widget instead.

Row limit applies where the display supports a limited result. A Dashboard table is often a preview, not the complete source list. View All Records opens the matching records where the provider supports a full drill-down. Tables, activity displays, maps, pie charts and donuts use one source series. Compatible time charts can combine series; use separate axes when units differ.

Drag cards to arrange them in edit mode. Keyboard arrow controls offer another way to move cards. Put the figures needed for a quick decision first, then trends and supporting detail. Appearance choices are available where the site provides more than one supported appearance; do not assume that every site offers the same set.

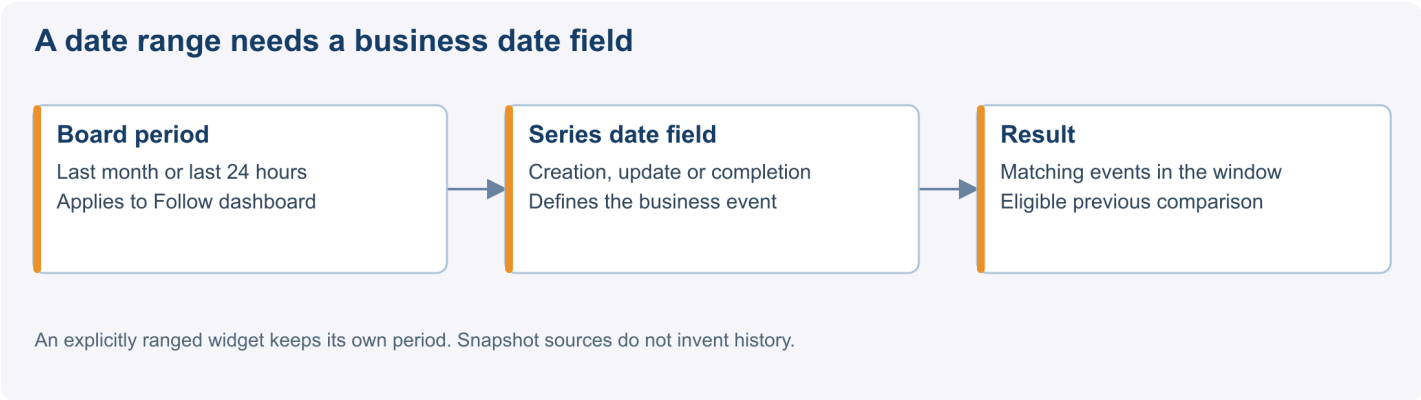
Live preview starts closed. Opening it evaluates the unsaved widget. Auto preview responds to changes while the section is open; Refresh Preview requests an explicit evaluation. Closing the section stops preview requests. A preview error belongs to the unsaved configuration and should be resolved before applying it. Apply Widget updates the board draft; Save Dashboard saves the board.

6 - Choose dates and make fair comparisons

The dashboard toolbar date range applies to widgets set to Follow dashboard. A widget with its own explicit range keeps that range when you change the toolbar. Its period remains visible so you can identify mixed-date boards. Shared filters and widget conditions still apply alongside the selected dates.

DATE CHOICE	MEANING
Today or Yesterday	A selected calendar day
This week month quarter or year	The current calendar period so far
Last month quarter or year	The complete preceding calendar period
Last 7 30 or 90 days	A rolling window
Last 12 months	The supported rolling annual window
Last 24 hours	A rolling time window with chronological hourly buckets for time charts
Custom dates	Your From and Through dates within the supported maximum span
All time	No selected date window

Last month differs from Last 30 days. On the fifth day of a month, Last month means the complete previous calendar month, while Last 30 days crosses the month boundary. Use calendar periods for reporting cycles and rolling windows for recent activity monitoring. Custom dates are a board-level option; a widget can follow that custom board period.



Date range and series date fields work together

The series date field defines which business event the range selects. Creation date counts records created in the window; completion date counts completed work in the window. A recent update is a different event again. The field's human-readable label does not change its underlying meaning. Read the source description and consult the source owner if a date is ambiguous.

For Last 24 hours, time charts show chronological hours in that rolling window. It is not a comparison of every 9 AM across many days. Boundary hours may be partial. Category charts retain their categories, such as Status, even when their records are selected from the last 24 hours.

Against the previous period is available for eligible summaries and single-series time charts. A previous-period time line is a comparison overlay; clicking it does not open current-period records. All time and snapshot sources do not provide this comparison. A zero denominator cannot produce a meaningful percentage change and is reported as unavailable rather than an invented result.

7 - Select sources measures and readable fields

A source describes a permitted business dataset. An API table source reads an enabled table, while a provider from another module can offer a more specialized dataset. Two similarly named sources may have different criteria or date semantics. Read the description before selecting one.

Records count is a count of matching records. Numeric measures can provide totals or averages where the provider offers them. Select a numeric field that actually represents the quantity you want: summing a technical ID has no business meaning. A currency display format improves presentation but does not convert between currencies or reconcile units.

The Breakdown choice changes how the data is organized. By date uses the date grouping selected for a time chart. A category breakdown such as Status or Region groups records by that field. The resulting table can rank categories by the chosen measure. An aging breakdown assigns records to age bands and is explained in chapter 13.

Readable fields depend on API metadata and relationships. A foreign key can have a label such as Cancelled rather than its numeric ID. A relationship can use a compound display label such as Name, City and Region from the related record. Technical table IDs and UUIDs are hidden from Dashboard record grids and exports.

If a label is missing, do not guess a numeric code. Ask a superadmin to review the enabled lookup table, relationship key and display fields. API Relationships supports explicit relationships where the source database does not declare a foreign key. Enabling a lookup table also makes it part of the permitted API table selection, so that administrator should review its fields and access rules.

Record-column selection is a searchable multi-select. Choose the business fields needed to recognize and act on records, and remove redundant columns using the selection's remove control. An API source offers only permitted, unmasked scalar fields in the supported catalog. A field absent from the catalog cannot be added by typing its database name into a widget title or an AI prompt.

8 - Build conditions with named multi-select values

Conditions narrow one data series in addition to its date range. Open Conditions and choose Add condition. Select the field, then a comparison and the value. The value editor changes according to the field and comparison; a related Status field should offer readable choices, while an ordinary numeric field expects a number.

To exclude cancelled and declined records, select Status, choose Does not equal, and select both Cancelled and Declined in the searchable option list. The system stores their underlying keys. You should not have to know their IDs. When Equals has several selected choices, a record can match any selected value. When Does not equal has several choices, all selected values are excluded.

Include or exclude several named statuses

Named field

Status from a safe lookup
Readable labels, not guessed IDs

Equals Cancelled or Declined

Matches either selected status
The saved values are their underlying record keys

Does not equal Cancelled or Declined

Excludes both selected statuses
Add an explicit empty-value condition when your policy needs it

All requires every condition. Any requires at least one. Nested groups make mixed rules explicit.

Named multi-select conditions and their matching rules

The example requires a configured, permitted status lookup. If your screen offers only numbers or an empty list, the missing relationship or readable label needs administrator attention. Choosing a guessed number may exclude the wrong status. A known option that cannot currently be resolved is a configuration problem, not evidence that the business status does not exist.

Use All conditions when every criterion must hold. Use Any conditions when one match is enough. Add group creates a nested All or Any block. For example, require Status not in Cancelled or Declined, AND require either Amount greater than 1000 OR Score at least 80. Read the expression beneath the controls to check the grouping before saving.

Contains matches part of a text value. Numeric comparisons require a valid number, and date comparisons require a valid date. Is empty and Is not empty need no value. Empty groups cannot be saved. The series supports up to twenty conditions and four nested levels; split an overly complex business rule into clearer widgets when possible.

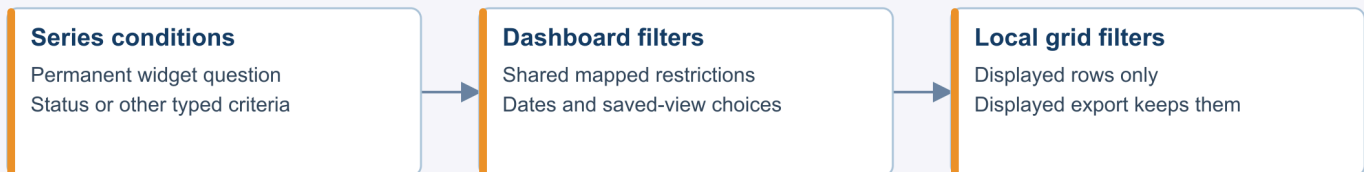
Use the trash icon to remove a condition, then preview and inspect matching records. To require a status as well as exclude named values, add Is not empty; decide explicitly how empty values should be treated.

9 - Use shared filters saved views and chart selections

Widget conditions define the question inside a series. A dashboard filter is a shared control that can narrow several compatible sources at once. In edit mode choose Add Dashboard Filter, select a field and explicitly map the filter to the source fields it should control. Give it a business label such as Region or Status, then apply and save the board.

Mappings matter. A Status field in Records is not automatically equivalent to a Status field in Transactions. Choose compatible fields deliberately. Sources without a mapping are unaffected. Dashboard filters combine with each other using AND and with the series' own conditions. A filter cannot grant permission or remove a mask.

Different filters affect different result populations



Complete record export uses query conditions and mapped filters, not a local page-only filter.

Three layers of filtering

Use the toolbar filter controls to change the viewed subset. Clear a filter to return to the broader permitted result. An eligible category chart can offer Filter Dashboard by This Group when you select a point. This helps move from an overview to a selected category. Relationship categories use their named values through the filter editor.

Local grid filters and sorting act on the rows already displayed in that grid. They do not necessarily change the underlying widget query or every page in a record drill-down. To define the complete exported population, use dashboard filters and series conditions. To tidy a displayed page for a small spreadsheet, use that grid's own filters and sort.

Actions / Saved Views preserves a useful combination of dates and dashboard filters for you at the current location. Set the period and shared values, open Saved Views, give the view a descriptive name and save it. Applying a view restores those choices. Update from current view replaces its saved choices and checks for concurrent changes.

A saved view does not rewrite the widget definitions. A widget explicitly set to All time still uses All time when a view changes the board period. Schedules can use a named view and can assign different saved views to recipients within the schedule owner's access. Use a name such as Northeast Open Work to make its purpose clear.

10 - Choose charts and interpret their results

Columns compare quantities across dates or categories. Horizontal bars are useful when category names are long. Lines show changes over time. Area emphasizes volume over a timeline. Stacked columns show contributions to a total, while mixed styles can combine lines, columns and area in a supported multi-series chart.

Pie and donut charts display shares of a whole and use one series. They work best with a manageable number of categories. If there are dozens of categories, use a ranked bar chart or table so small values remain recognizable. A map is a geographic chart with its own source requirements; a category called ZIP does not by itself configure an address map.

Select the measure before the visual style. A chart of records by month differs from a chart of total value by month even if the lines look similar. Use a title that states the measure and, when needed, the date meaning. Avoid calling an intake count Revenue or a creation-date chart Completed Work.

Compatible series can share a time axis. Give each a meaningful series label and choose its style and axis. When one series is a currency amount and another is a count, separate axes make their units clear. A ratio or percentage KPI is often a better presentation when the real question is the relationship between the two measures.

View Chart data opens the supporting values where available and includes Excel export. An eligible current-period point can offer matching records. A category drill-down is constrained by its category, dates and conditions. Previous-period comparison points do not become current-period record selections.

A workflow funnel compares separately configured stage counts. It is useful for workload visibility, but it is not proof that the same records progressed through each stage. A narrower date window can make later stages larger than earlier ones because they may represent different cohorts. Define the source and stage criteria carefully, and explain the business meaning in a Text / Notes widget.

11 - Work with tables activities and drill-downs

A Data Table can show permitted records or a ranked category result. Choose readable record columns in the widget editor. Keep identifiers that users actually recognize, such as an order reference or account name, and hide redundant technical columns. Dashboard automatically prevents technical table IDs and UUIDs from becoming ordinary grid columns.

The widget's Row limit controls its preview. A ten-row card is not a statement that only ten matching records exist. Read the note below the grid. Providers that support full records expose View All Records or View Records; limited providers explain that the source screen is needed for the full list.

Open a record drill-down from a summary, eligible chart point or map detail. The drill-down applies the initiating widget's source, date range, conditions and applicable filters. A map selection additionally constrains the geography. Use Previous and Next to move between pages where a complete provider result is supported.

Follow the evidence from a result to Excel



All filtered export is bounded. Technical table IDs and UUIDs remain hidden.

From a figure to matching records and Excel

Sorting a displayed column changes its visible order. A grid filter reduces the rows shown locally. Export This Page Excel preserves the displayed subset and order. Export All Filtered Records Excel uses the complete provider result defined by the dashboard query; it does not promote a filter typed only into one visible page into a database-wide restriction.

Activity List is available for sources that support that display. It is intended as a short operational list, not a generic replacement for the module's full administration screen. If the source cannot provide an activity display, use a permitted record table or another compatible display.

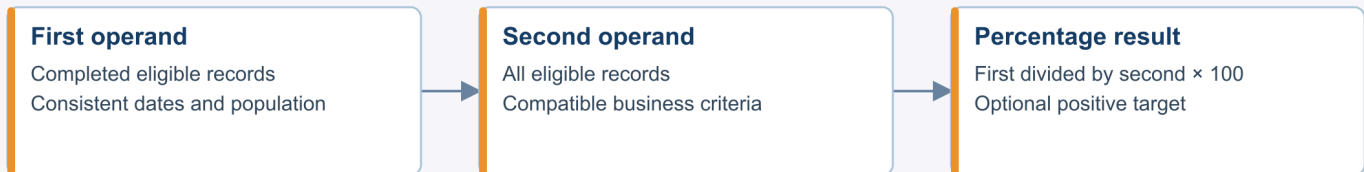
When related values appear as readable names, those labels carry into Excel. Missing labels, stale source warnings or unavailable cards should be investigated before treating a download as a definitive business report. Follow the record link or use the source module to edit underlying business data; the Dashboard grid is a reading and analysis surface.

12 - Calculate KPIs targets and reusable metrics

In Data Summary, add the operand series and choose a Calculation. Show each measure displays separate figures. Sum of measures adds all operands. First minus remaining measures subtracts each later operand from the first. First divided by second creates a ratio, and First divided by second times 100 creates a percentage. Ratio and percentage require exactly two operands.

For an illustrative completion rate, select Completed Records for the first series and All Eligible Records for the second. The resulting percentage is completed divided by eligible times 100. Both operands should use consistent periods and compatible business criteria. If the numerator excludes a category but the denominator accidentally includes a different population, the arithmetic can be valid while the KPI is misleading.

Define the numerator and denominator of a KPI



A zero denominator or missing operand is unavailable, not an invented percentage.

A completion rate KPI and its operands

Set the Calculated label to Completion Rate and choose a percent unit. An optional positive Target can show progress, such as progress toward a 90 percent goal. With Show each measure, the target belongs to the first result. A missing operand or zero denominator produces an unavailable result rather than a fabricated zero or percentage.

Use View Records to investigate an operand where the source supports it. A composite KPI describes a relationship between source results; it is not necessarily a single set of records that can be listed as one population. Label the inputs clearly so users can inspect the right evidence.

Save as metric beside a configured series creates a reusable named definition of the source, measure and conditions. Choose a business name and useful description, such as Eligible Open Records. A saved metric can then be selected from the source list in other widgets. Actions / Metric Library manages those definitions.

Sharing a metric requires publisher permission. A shared metric remains subject to each user's current source access. Changing its central definition affects widgets that reference it, so inspect the impact before editing a metric used by several teams. Saving a metric reuses query configuration; it does not freeze historical figures or authorize another user to read restricted data.

13 - Track aging overdue work and funnel stages

An aging breakdown groups records by the selected aging date. The available bands are Future date, 0 to 7 days, 8 to 30, 31 to 60, 61 to 90, over 90 and Unknown date. These are age bands, not automatic business statuses. A future appointment can be valid work rather than an error.

Select the aging date that answers the question. Record creation date tells you how long the record has existed. A due date describes a commitment. A completion date is inappropriate for measuring how long currently open work has been waiting. Use a bar chart to compare bands or a category table to inspect counts.

An overdue record source uses an explicit due-date field and open-state conditions. For example, choose a due date earlier than the relevant cutoff and restrict the source to statuses your organization treats as open. Exclude completed or cancelled work explicitly when that is your policy. Dashboard cannot infer whether a record is open from a title alone.

The workflow funnel chart uses a record-count series for each stage. Give every stage a label and its own criteria, such as New, Assigned, Scheduled and Completed. Stage totals can help a team see workload distribution or identify a large waiting stage. The displayed percentage compares stage counts; it does not reconstruct movement of individual records between stages.

Validate one operational widget against a matching-record drill-down. Inspect records in the oldest band, verify the chosen date and check an example of completed work. Add a Text / Notes card explaining the age definition and the operational owner. That explanation prevents another team interpreting record age as overdue days when the configuration actually uses creation date.

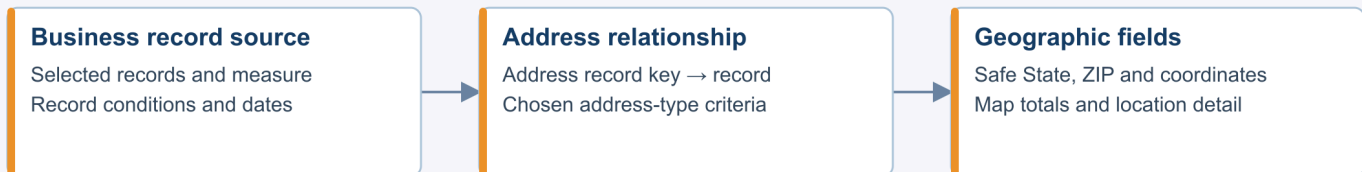
Saved metrics can reuse consistent open-work criteria across an aging card, an overdue list and a KPI. Keep the metric name explicit about its population, and review the source permissions before sharing it with other roles.

14 - Build a map from geographic data

Maps are a way to analyze geographic data, not a separate industry product. Any permitted source that exposes the required geographic fields through its provider can support a map. Examples include transactions, store orders, service locations, accounts and assets. Your available map measures depend on the provider; a count of records and a sales amount answer different questions.

A source may contain its own State field, or obtain geography through a related address table. For API data, an administrator enables the required tables, configures safe geographic field roles in API Dashboard Fields, and supplies a relationship in API Relationships when the database has no declared foreign key. The relationship connects an address's record key to the business record's unique key. A compound display label such as Name, City and Region makes related records recognizable.

Map permitted records through geographic fields



Use one series with its geographic fields or a related address source. Two unrelated series do not create the map.

Business records use their own or related geographic fields

1. Customize the dashboard and choose Add Widget.
2. Select a permitted source and a measure that supports mapping. Keep one series.
3. Choose Chart and Map of US states in Display.
4. Use the source's State field, or select a related table in Map address source when the API provider offers that control.
5. Select permitted State and optional ZIP, street, city, latitude and longitude fields. Use the provider's prepared geographic choices for commerce sources.
6. Add business-record conditions, such as excluding Cancelled and Declined. If an address table has several address types, select the type appropriate to your question, such as Billing or Service Location, using address-source conditions.
7. Use a wide card with a meaningful title, preview it, then Apply Widget and Save Dashboard.

Keep business-record criteria and address criteria separate. A record-status restriction should not accidentally apply to an address field with a similar name. Use All conditions where every chosen restriction must hold. Adding two unrelated series does not establish a geographic relationship.

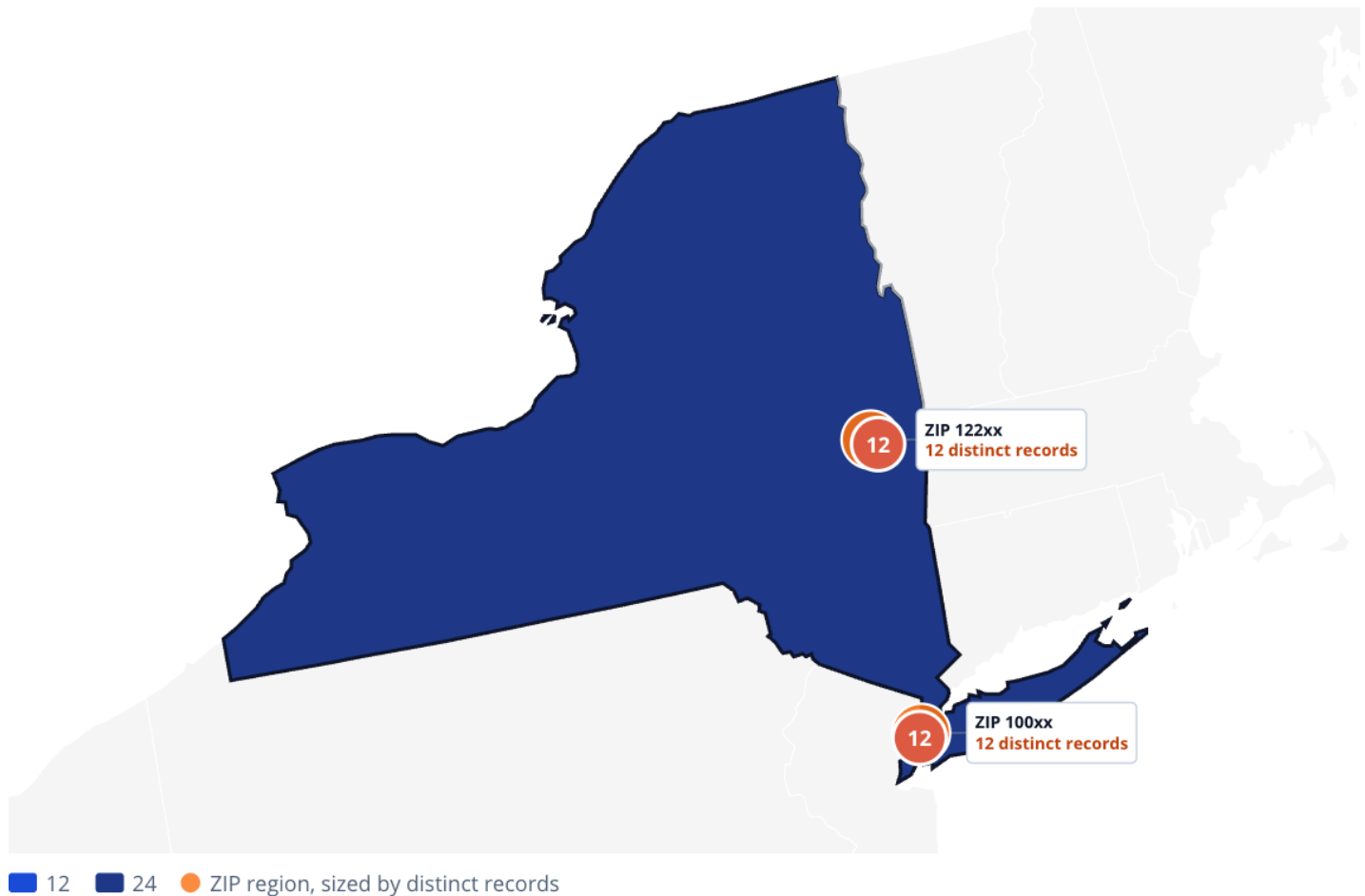
If Map of US states is disabled, confirm there is one series and that the provider exposes safe geographic fields. A ZIP category breakdown is ordinary category analysis; it does not configure the map's address source. Ask an administrator to check API selection, field roles and relationships when geographic choices are missing.

Commerce providers can contribute prepared geographic sources, including sales and orders by state or postcode. Choose a compatible source and measure from the catalog rather than expecting every commerce measure to support a map. The same state-selection and geographic exploration workflow applies.

Missing or unknown state codes are identified separately. Review them before assuming every selected record appears in a colored state. A record with qualifying addresses in several states can appear in each state, so state totals may not sum to the global distinct-record count.

15 - Explore maps and inspect locations

The full US map shades states using the selected measure. Select a state to zoom into it; keyboard users can focus a state and activate it with Enter or Space. Back to full map restores the national view. A zero-result state tells you there are no matching records for that selection.



US state map zoomed to New York with ZIP-region detail

In state detail, ZIP regions use the first three digits of valid ZIP codes. They provide regional context rather than a promise of a precise location coordinate. When permitted latitude and longitude are available, the map loads coordinate locations and clusters nearby pins. Activate a cluster to inspect its records, or zoom to separate locations.

Search works across the currently loaded addresses and summaries. It is not an unrestricted search of every source record. The map loads at most one thousand coordinate records for a state. A cluster's detail list displays at most one hundred records. Narrow the dates or conditions when you need to inspect a larger population.

Identical address rows are deduplicated for pins. Map counts remain based on the supported distinct-record semantics for each geographic group. One record can have more than one qualifying address, so always read the measure label and the state or cluster selection before comparing totals.

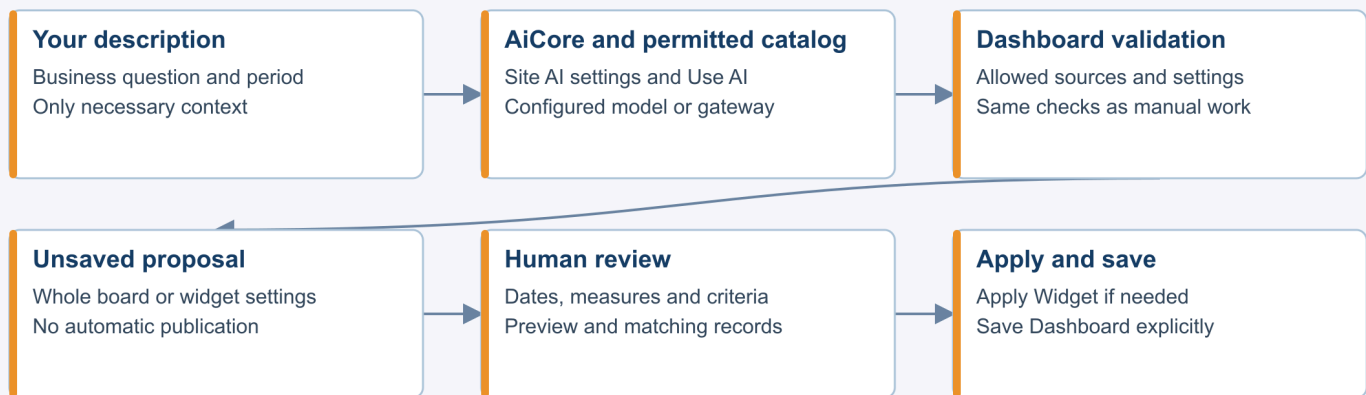
Show these records, View location records and the state or region lists provide matching details where supported. These lists include Excel export. A record drill-down continues to enforce source permissions, dates, record conditions and address criteria. Downloading the dashboard PDF preserves the current map zoom and presentation.

Locate missing addresses is optional. It sends permitted address data to the configured external geocoding provider only when explicitly requested and enabled by an administrator. The action processes a small bounded batch, not a bulk conversion of the whole customer database. Existing coordinates do not require an external lookup. If geocoding is unavailable, coordinate data can still be maintained through the approved source process.

16 - ✨ Create a whole dashboard with Indition AI

Indition AI is integrated through AiCore. When it is available to you, New Dashboard offers Describe the dashboard you want and Create with AI. It uses the catalog of sources and measures you are currently allowed to see. It does not give an AI model unrestricted access to the source database.

AI proposes a definition and the user decides



AI design receives catalog and prompt text, not computed result figures.

Indition AI dashboard creation and the human review step

1. Open Actions / New Dashboard.
2. Describe the business subject, period, questions and useful displays.
3. Choose Create with AI and wait for the proposed dashboard.
4. Read the generated name, source choices and any note about omitted widgets.
5. Inspect each widget's measure, date field, criteria, labels and previewed result.
6. Adjust the layout and configuration, then choose Save Dashboard when the board answers your question.

An example description is: Create a operations dashboard for this month with an eligible-record count, daily record trend, a status breakdown and a readable record table. Exclude cancelled and declined records where those named statuses are available. Another is: Create a transaction review dashboard for last month with total transactions, average permitted amount and a daily trend. Use actual source labels from your site.

A whole AI-created board starts with up to twelve widgets. You can extend it manually within the ordinary dashboard limit. The generated board opens as an unsaved draft. Creating it does not publish it to a role, schedule a delivery or change source records. It remains subject to the same builder validation as a manually configured board.

Be specific about business meaning. This month based on creation date and This month based on completion date answer different questions. Asking for completed work requires a supported source or explicit criteria that represents completion. Review the generated conditions instead of relying on the wording of the title.

The description can be up to one thousand characters. Avoid private record details, credentials and unnecessary personal information. The design request contains the permitted catalog and your text, so business labels and your own description are information supplied to the configured AI service. If the catalog cannot support a request, AI can explain that or leave unsupported widgets out; it cannot enable a restricted table.

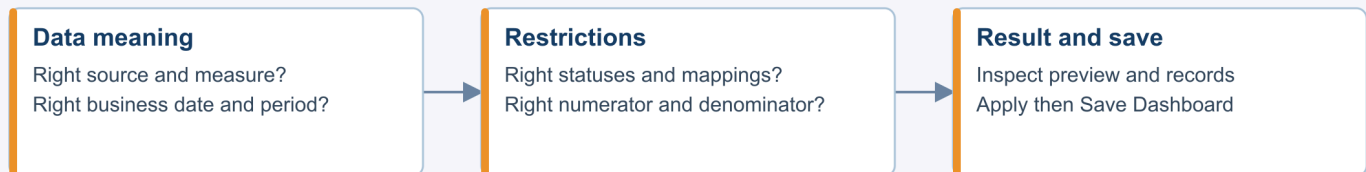
17 - Design and revise a widget with Indition AI

When widget assistance is enabled, Add Widget offers Describe this widget. Choose a clear description and select Build it. AI proposes the data, measure, chart and period, then fills the ordinary editor for your review. Choose Create Manually whenever you prefer direct control.

Useful descriptions include Count eligible records created this month excluding cancelled and declined statuses, Plot transaction count by day over the last 30 days as a line, and Show a ranked horizontal bar chart of open repair work by status. Each request depends on the sources and choices actually present in your catalog.

You can also revise an existing widget. For example, ask Make this monthly instead of daily or Change the chart to horizontal bars and show the ten largest categories. The request includes a representation of the current widget, allowing the suggestion to retain settings you did not ask to change. Review the result to confirm that the source and criteria still match your intention.

Review an AI suggestion before accepting it



A working preview proves executability; the user still checks the business definition.

The AI widget review checklist

Check the chosen date field, especially when the source has creation and update dates. Check each operand in a calculated summary, the chart grouping and any status exclusions. A rendered count proves the configuration can run, but it does not prove the business definition is correct. Inspect matching records when a distinction matters.

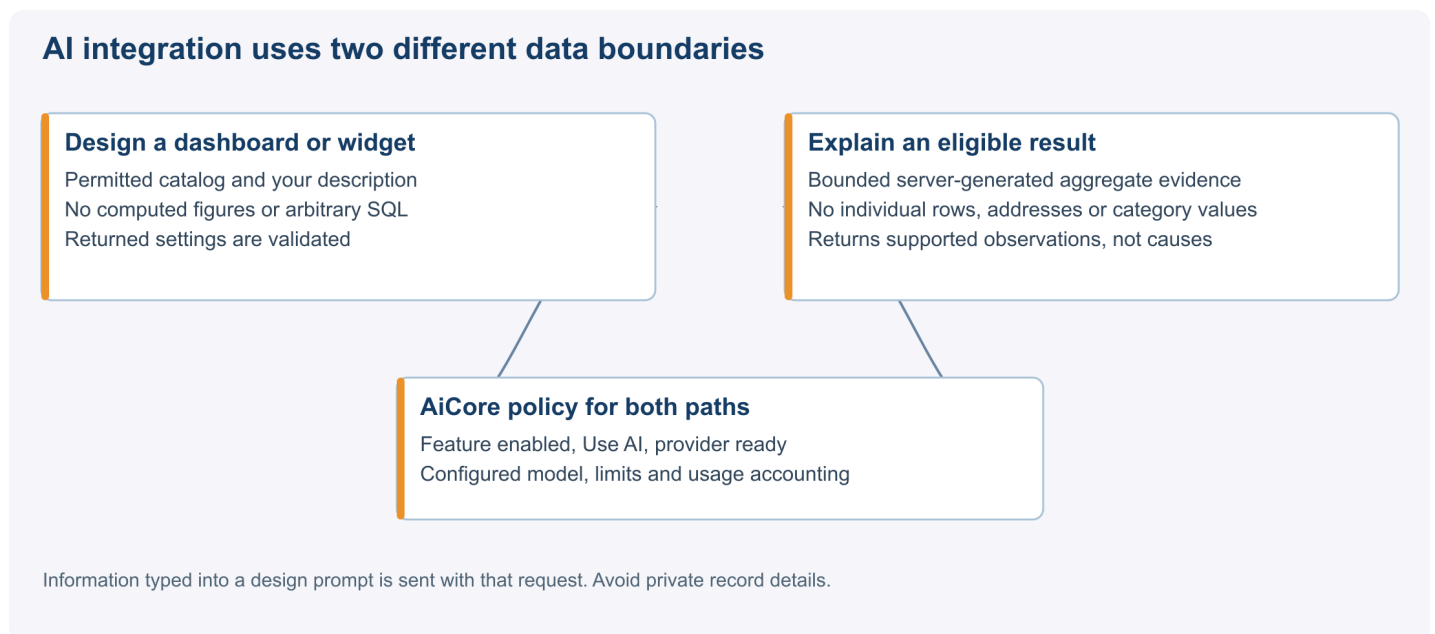
After review, Apply Widget updates the board draft. Save Dashboard persists it. The AI request itself does neither. If the model returns settings the builder cannot use, the system attempts a bounded correction. An answer that still fails is not saved as an arbitrary query. You can rewrite the description or continue manually.

AI assistance is optional and controlled separately for whole-dashboard creation, widget design and result explanation. If the description controls are absent, the site may have switched off that feature or your account may lack Use AI permission. A provider, key or gateway configuration and budget can also affect availability. Ask an administrator to review AI Settings rather than entering credentials into a prompt.

18 - Explain results with Indition AI

Explain this result is a separate AI workflow. It helps select useful observations from supported aggregate evidence for an eligible widget. It is not the same as designing the widget and is not a general chat session with every business record.

Open an eligible result and choose Explain this result when the feature is available. The system evaluates the permitted widget and prepares bounded aggregate facts, such as current and previous figures, comparisons and stale or unavailable signals. AI selects among server-generated evidence identifiers. The displayed observations come from that supplied evidence.



Data boundaries for AI design and AI result explanation

The explanation path does not send individual records, addresses or category values. The design paths send the permitted catalog and the text you enter, not the computed dashboard figures. These are different boundaries. A user-entered prompt can itself contain sensitive information, so keep design descriptions focused on the analysis rather than customer records.

An observation such as The current total is lower than the previous total describes a difference. It does not establish why that difference occurred. Investigate matching records, source freshness, changed criteria and business events before deciding that performance improved or deteriorated. AI is instructed not to invent causes.

Unavailable and stale-data evidence deserves attention before a numerical comparison. A source that stopped updating can make a recent-period chart look quiet. A missing denominator can make a ratio unavailable. Neither result should be converted into a confident business conclusion.

Explanation needs feature enablement, a ready provider, Use AI permission and suitable aggregate evidence. Widget creation can be enabled independently. Record links retain current data permissions.

19 - Export Excel and capture the dashboard as PDF

Choose the output according to its purpose. Excel is for tabular values and matching records. Dashboard PDF is for the board as it is currently presented, including figures, charts, map zoom and displayed table rows. An editable template is a third type of artifact and is managed through template tools.

Every Dashboard data table includes an Excel export path, including chart-data tables, state or region lists, location details and supported record drill-downs. Displayed exports retain local filter choices and current sort order. They use genuine XLSX workbooks produced through Xpress's Excel writer.

Export All Filtered Records Excel downloads the complete supported provider result for the widget's dates, conditions, dashboard filters and drill-down selection. A filter typed only into the currently displayed page does not constrain that complete query. To export every eligible record except cancelled and declined, place those exclusions in the series conditions before opening the record export.

Complete exports are bounded at fifty thousand rows or two hundred fifty thousand cells. Oversized requests return an error rather than a misleading partial workbook. Narrow the period or business criteria and export smaller sets. Displayed exports have smaller safety limits and represent what the grid currently shows.

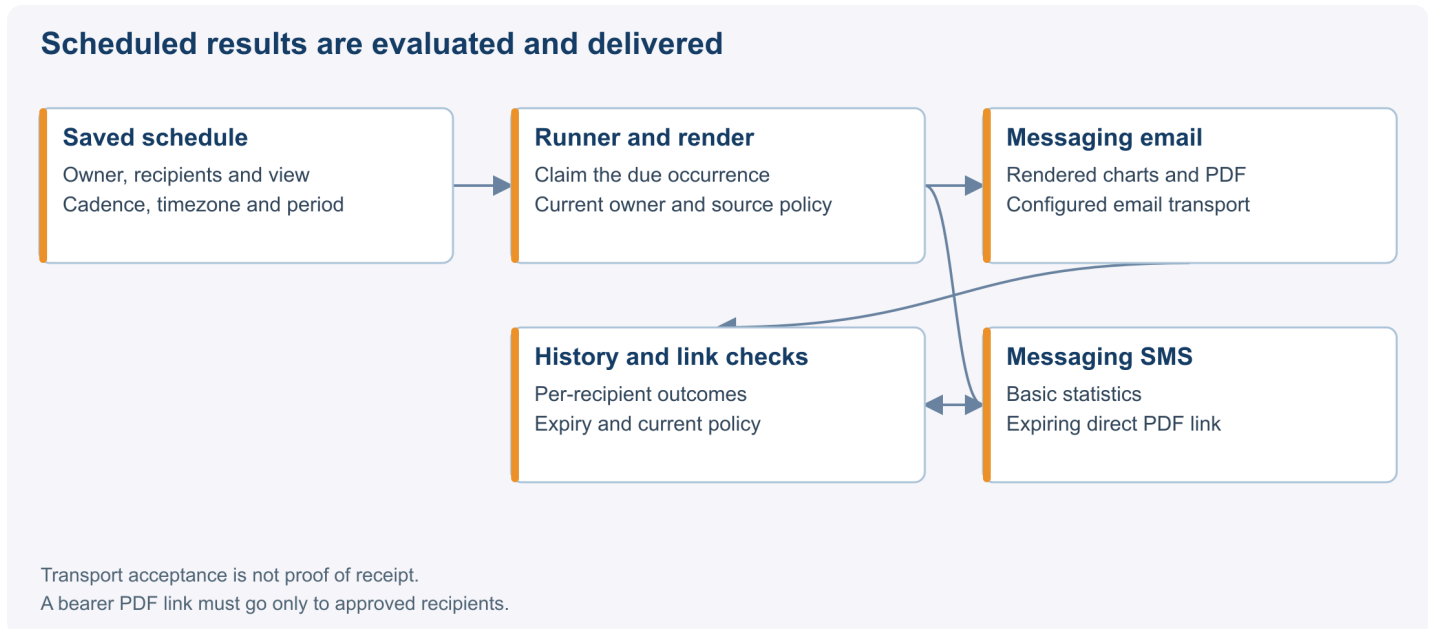
Technical IDs and UUIDs stay hidden. Related values use their readable labels. Numeric zero stays numeric, while reference strings keep leading zeroes. Text that resembles a formula is written as literal text. Formatting does not make a mismatched currency or misunderstood date field correct.

To download a Dashboard PDF, save or cancel edits, choose the desired dates and filters, and wait for the cards to finish loading. Open **Actions / Download PDF**. It captures the current presentation; it does not include every unrendered row from a source table. Map zoom and the legend are kept together where supported.

The filename uses the dashboard name with spaces replaced by hyphens and an appended millisecond timestamp so repeated downloads have distinct names. A PDF report is a presentation snapshot. Use an Excel record export when you need the complete matching dataset, and use a scheduled delivery when you need recurring reports rather than repeatedly downloading by hand.

20 - Schedule email and SMS delivery

Save the dashboard before choosing Actions / Scheduled Delivery. A schedule defines when results are evaluated and which recipients receive them. It uses the schedule owner's current access, the selected dashboard and any configured view. It does not freeze the data at the time the schedule was created.



Scheduled Dashboard delivery through native job runner and Messaging

Choose daily, weekly or monthly cadence, a local delivery time and timezone. For weekly schedules select the day; for monthly schedules choose the day of the month. A day beyond a short month's length uses that month's last day. Check the timezone carefully when different teams operate in different regions.

Select the reporting period and any saved view. A schedule can follow a saved dashboard or a named view. Recipient-specific views let different recipients receive different filtered PDFs within the owner's access. A widget with its own explicit range keeps that range; it does not automatically adopt every scheduled board period.

Email recipients can be entered one per line or comma-separated. Email includes rendered dashboard content with charts and an attached PDF. SMS recipients need international numbers including a country code. SMS sends basic statistics and an expiring link to the full PDF rather than trying to fit the rendered board into a text message.

The PDF link opens directly without dashboard login while it is valid and the report remains permitted. Treat it as a shareable bearer link: anyone holding it can use it during its lifetime. Use approved recipients and the configured expiry. Current owner and source policy are checked for downloads; expiry, disabled notifications or revoked access can make an old link unavailable.

Use Preview test & history to inspect the message and PDF before enabling routine delivery. A one-recipient test email is bounded and does not advance the regular schedule. Email or SMS acceptance by the configured transport is not proof of inbox placement or handset receipt. Inspect the transport and delivery history when a recipient reports a missing message.

An administrator must enable notifications and the required channels, configure Messaging and the public HTTPS address, and run the native scheduled service. Disabled notifications are an explicit skipped outcome. A manual test working does not prove that every cron server uses the current application configuration.

21 - Send conditional alerts and investigate delivery history

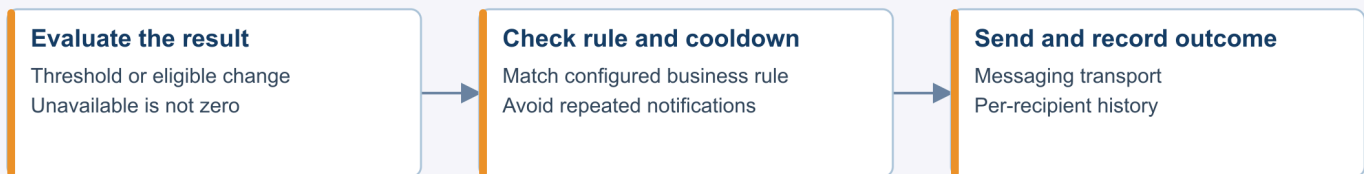
A schedule can deliver at every due time or check a supported alert rule. Threshold rules compare a selected summary result with the configured value. Percentage-change rules use an eligible current and previous result. Select the intended widget and result rather than assuming the first number on the board is always the business metric you want.

For an illustrative backlog alert, create a summary of eligible open records, inspect its matching records, then configure delivery when that result exceeds the agreed threshold. The threshold is a business policy you supply; Dashboard does not know what your team considers an excessive backlog.

Percentage-change alerts need a meaningful previous result. A zero denominator or unavailable comparison cannot support a valid percentage rule. Missing data does not trigger or clear an alert as if it were a real zero. Review unavailable results and source freshness before interpreting a quiet alert history.

Cooldown prevents repeated matching results from sending messages too frequently. A schedule is still evaluated according to its cadence; cooldown controls supported repeat delivery behavior. Preview and test tools do not advance the ordinary occurrence. They are intended to verify content and transport, not simulate every future scheduling condition.

A scheduled alert needs a valid result and rule



Manual preview and tests do not advance the normal scheduled occurrence.

Alert evaluation and delivery outcomes

History records delivery attempts and recipient outcomes. Read whether the schedule was accepted for processing, which channel was used and whether the transport accepted or failed the message. Uncertain transport outcomes are not automatically resent, because retrying an accepted but ambiguously reported message can duplicate notifications.

If delivery stops, check in order: notification enablement, channel enablement, the schedule's enabled state and due time, owner activity and permission, source availability, alert eligibility and cooldown, then Messaging transport. Check that the scheduled runner uses the intended site workflow and the same code as the manual run. Two cron servers with different deployments can produce conflicting results.

Review schedules when owners, permissions or shared definitions change. Recipient views narrow the owner's accessible result; they do not impersonate recipients or widen access.

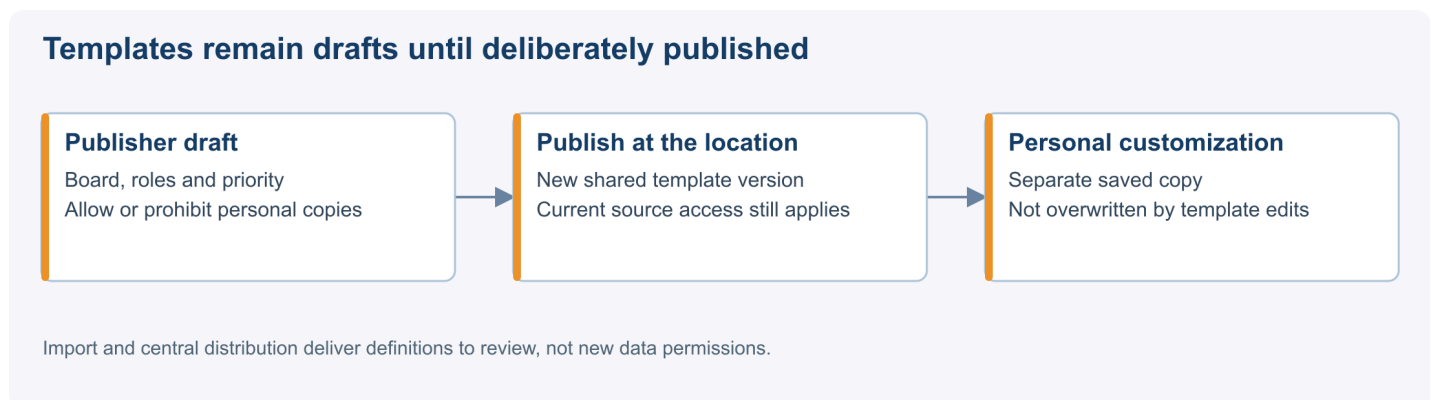
22 - Publish role templates and transfer layouts

Template management is for authorized publishers. Open Actions / Manage Templates. A template provides the layout a role lands on at a location. Saving draft edits is separate from publishing them. A personal dashboard can remain useful without becoming a shared role standard.

Create a new template from the available starting points, including AI where enabled. Configure the board, then open Role Settings. Choose the roles that should receive it and the priority used when a user has more than one matching role. Choose whether people may customize their own copy.

Publish after checking the definition against representative role access. A publisher being able to see a source does not guarantee every recipient role can see it. Publication distributes a layout, not the publisher's data privileges. Explain intended audiences in the template name and any accompanying notes.

Published versions can be reviewed and restored as a new published version. Personal copies are retained when their original template changes. This protects individual work but means a policy change in a shared template is not the same as rewriting every user's personal dashboard.



Template publication and transfer remain separate from personal edits

Export Template and Import Template transfer an editable definition as JSON. They are not record exports. The destination must have compatible permitted sources and configuration. Import creates a definition to review rather than automatically granting roles or publishing live changes. Validate the destination's fields, metrics and optional providers before relying on it.

Where the central administration location supports distribution, a publisher can preview destination compatibility and deliver drafts to selected instances. Delivered templates remain drafts until published at the destination. This central action is not offered as a general capability to every standalone API user.

The location's dashboard enablement toggle changes whether that location uses Dashboard as its landing experience. Turning it off restores the prior page and retains saved dashboards in the builder. Publishing permission is an explicit capability; being able to customize a personal board does not imply the right to change role defaults.

23 - Use Central Records starters and maintain trustworthy results

Central Records gives administrators a named list of important API tables. A mapping such as `records=Records`, `transactions=Transactions` or `tasks=Tasks` supplies readable starter labels. Entries can be one per line or comma-separated. These examples are illustrative: use actual enabled table names on your site.

Open New Dashboard or the ready-made dashboard selector and look under API data. The provider can build starter boards named for the configured subjects. Each permitted central table contributes a total, a trend when it has a suitable date and a readable record table. Large configurations split into boards within the widget limit.

A starter is a useful scaffold, not a finished business definition. Total Records does not automatically mean active tasks. Customize the starter, set the intended date field and status conditions, choose useful columns, then save it. Selecting a starter does not publish it to everyone or change the API table selection.

Use Refresh to request current results. Auto-refresh choices are Off, every thirty seconds, every minute and every five minutes. Refresh pauses while the page is hidden or while the user is arranging the board or interacting with dialogs. Ordinary results can be briefly cached, so a frequent refresh interval is not a source-ingestion guarantee.

Optional source freshness uses a configured update field and threshold. Stale describes the age of source data. Unavailable describes an evaluation that could not produce the expected result. A true zero is a successful query with no matching records or a real zero measure. These states should not be conflated.

When a number surprises you, inspect its source, chosen date field, explicit range, widget conditions and shared filters. Then inspect matching records and source freshness. Comparing an All time KPI with a This month table will often produce different figures correctly. Use descriptive titles and notes to make such differences deliberate and visible.

24 - Resolve common problems and learn the terms

If a source is missing, ask an administrator to verify module availability, API table selection, read access and unmasked field eligibility. If a relationship field offers numeric values, ask for a safe lookup relationship and readable display fields. Do not guess database IDs in a condition.

If a map cannot be selected, use one series and verify a valid state source. If it shows no pins, inspect coordinates separately from state and ZIP availability. A state total can exist even when some matching locations have no permitted coordinates. If an export is too large, narrow the period or business criteria rather than accepting a partial result as complete.

If an AI option is missing, verify feature enablement, Use AI permission, provider readiness and spending limits with your administrator. If a generated widget fails, refine the request or continue manually. If results need a causal explanation, investigate the business evidence; Explain this result reports supported observations, not a diagnosis of organizational causes.

If delivery fails, inspect test and history information, then check notification settings, owner access, Messaging and the scheduled runner. Never paste credentials, public PDF tokens or private business records into a support prompt. Report the action, time, visible error and affected source to an authorized administrator.

TERM	MEANING
Dashboard	A saved layout and analysis definition
Widget	A card containing one display
Source	A permitted dataset exposed by a provider
Measure	A supported count total average or other result
Series	A configured source measure and criteria within a widget
Breakdown	The date or category organization of a result
Condition	A restriction applied to one series
Dashboard filter	A shared restriction mapped to compatible sources
Saved view	Your named combination of dates and shared filters
Saved metric	A reusable source measure and condition definition
Template	A shared layout maintained by a publisher
Drill-down	Matching detail reached from an aggregate or geographic selection
Source freshness	The age of a configured source update signal
Delivery schedule	A recurring evaluation and notification definition

TERM	MEANING
Expiring PDF link	A direct report link usable while its token and policy remain valid

For administration, AI readiness, source relationships and notification setup, use the Setup Guide. For provider contracts, policy boundaries, storage and operational limits, use Technical Documentation. The FAQ provides shorter answers; it does not replace the complete workflows in this manual.