

Create a New Widget

Stacked Column Chart - Closed Won Booking - Marketing Generated

1

Navigate to <https://insights.calibermind.com/app/main#/dashboards/62e40245ba b7990038745640>

2

Click "Widget"



3 Click "Advanced Configuration"

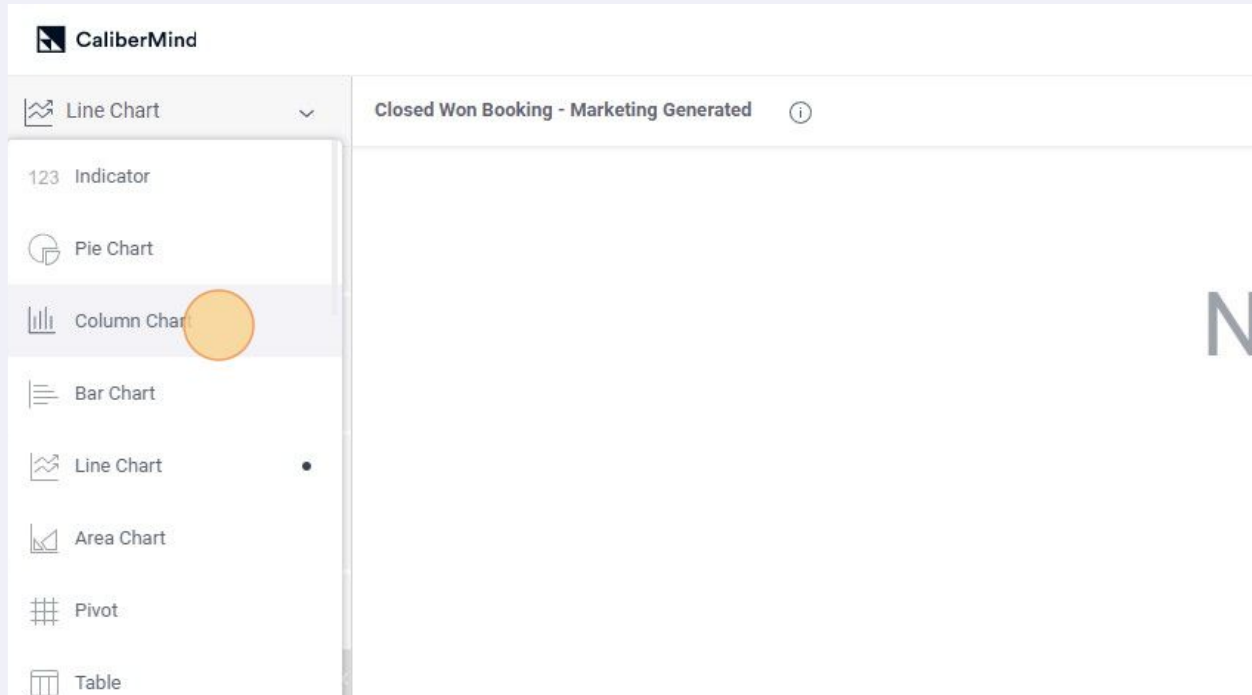


4 Click "Set a Title"

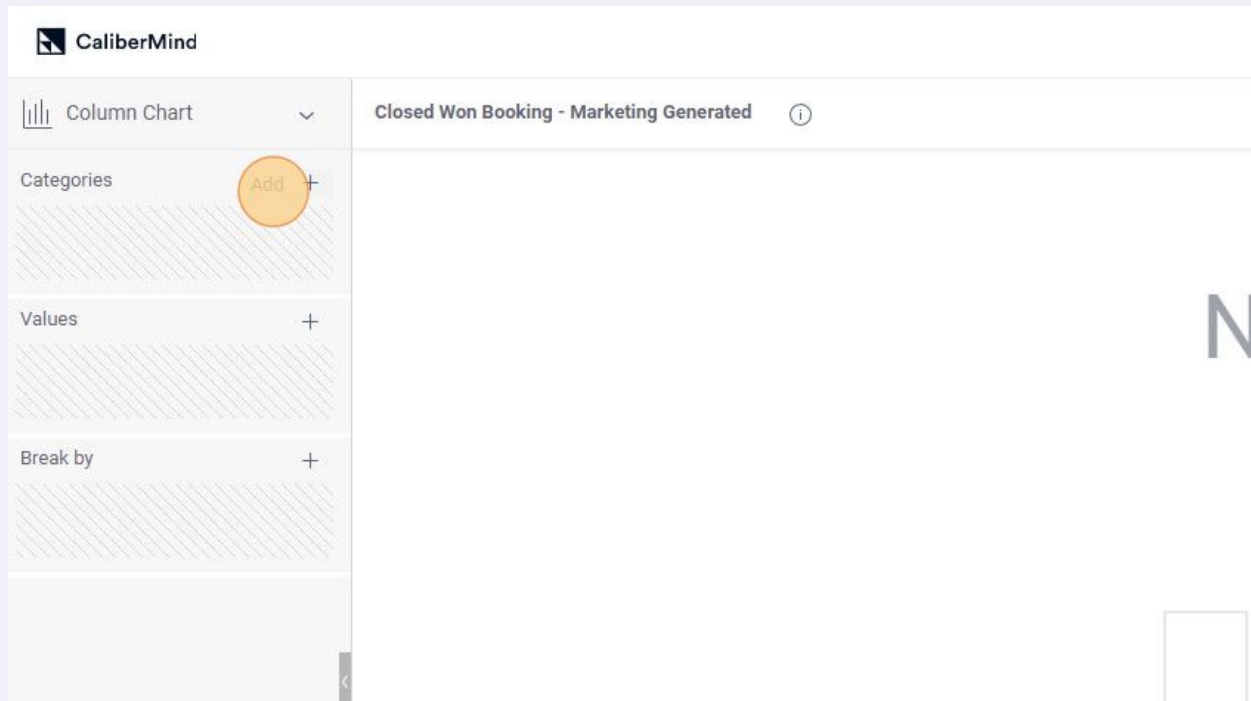
The screenshot displays the "CaliberMind" configuration interface for a "Line Chart". On the left, there are three expandable sections: "X-Axis", "Values", and "Break by", each with a plus sign. The main area on the right is a large white canvas. At the top of this canvas, there is a button labeled "Set a Title" and an information icon (a circle with an 'i'). An orange circle highlights the "Set a Title" button.

5 Type "Closed Won Booking - Marketing Generated"

6 Click "Column Chart" from the drop-down list on the left rail.

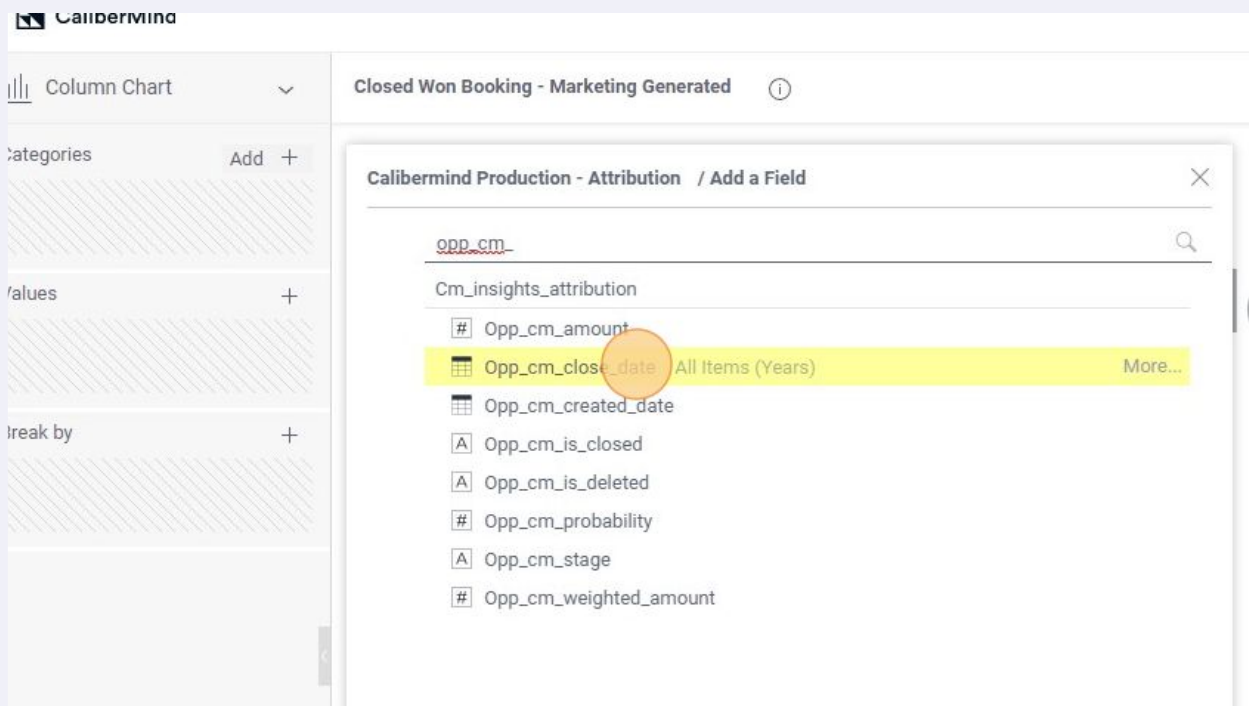


7 Click "Add" to select a "Category."

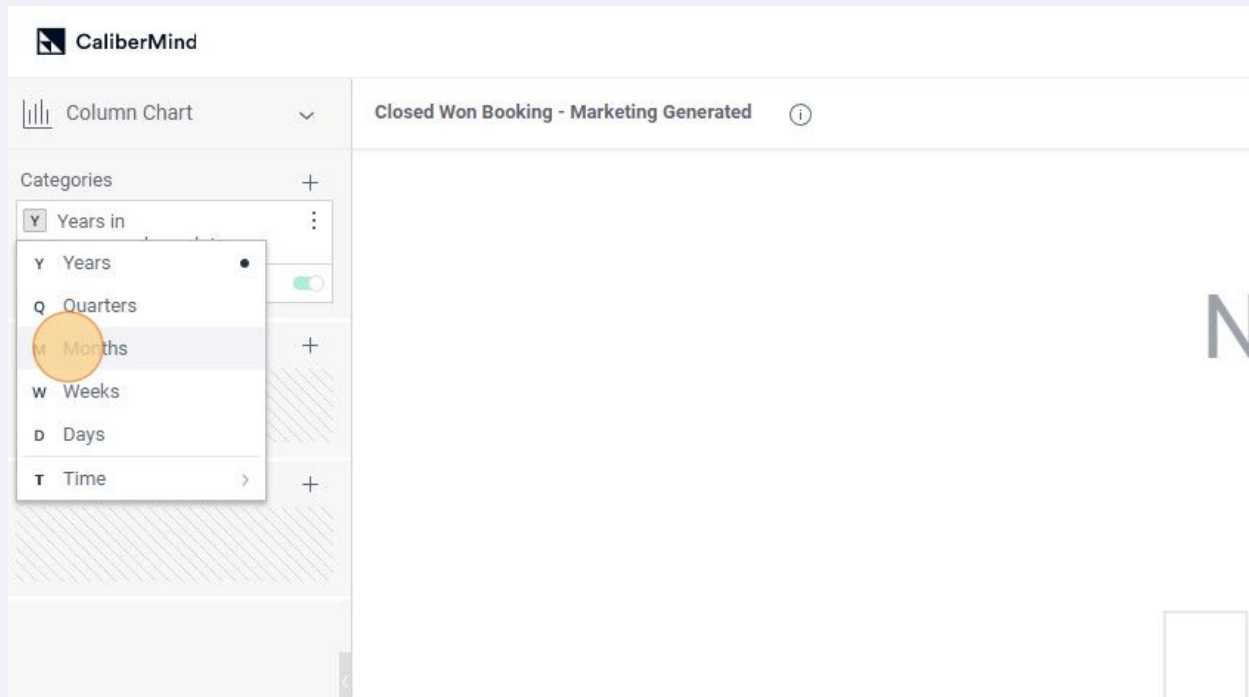


8 Type "opp_cm_"

9 Click "Opp_cm_close_date"



10 Click on the Y icon to change the category. Click "Months."

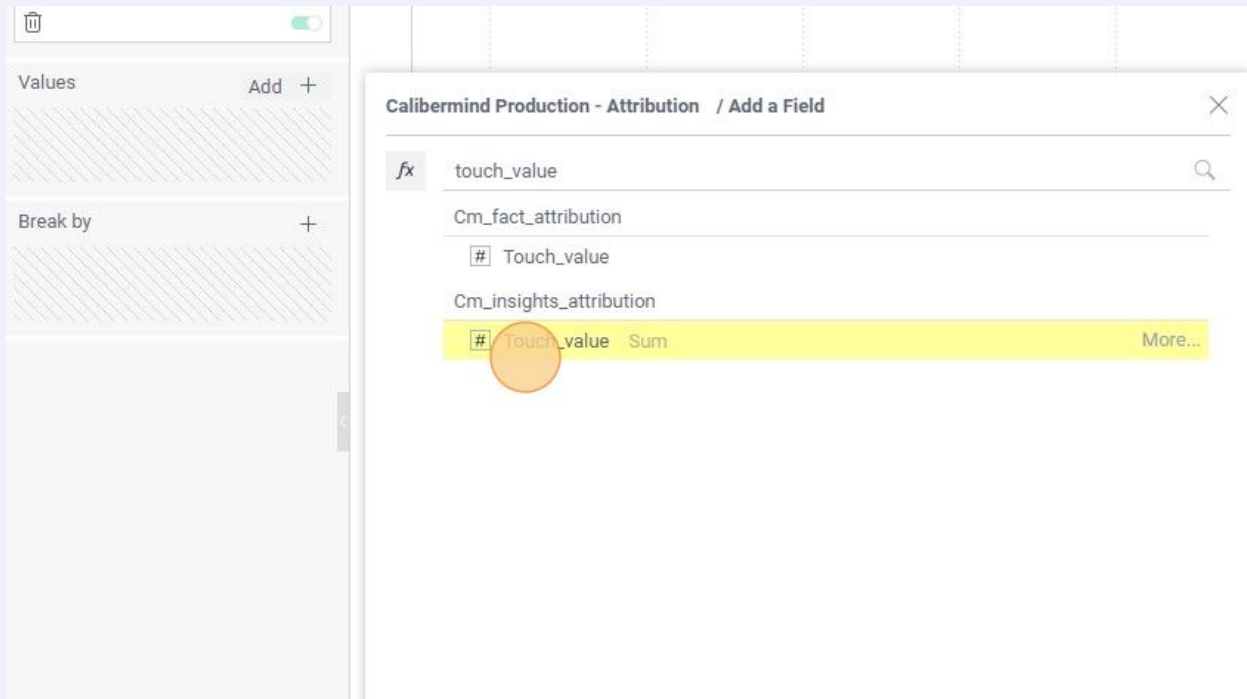


11 Click to add a value field.

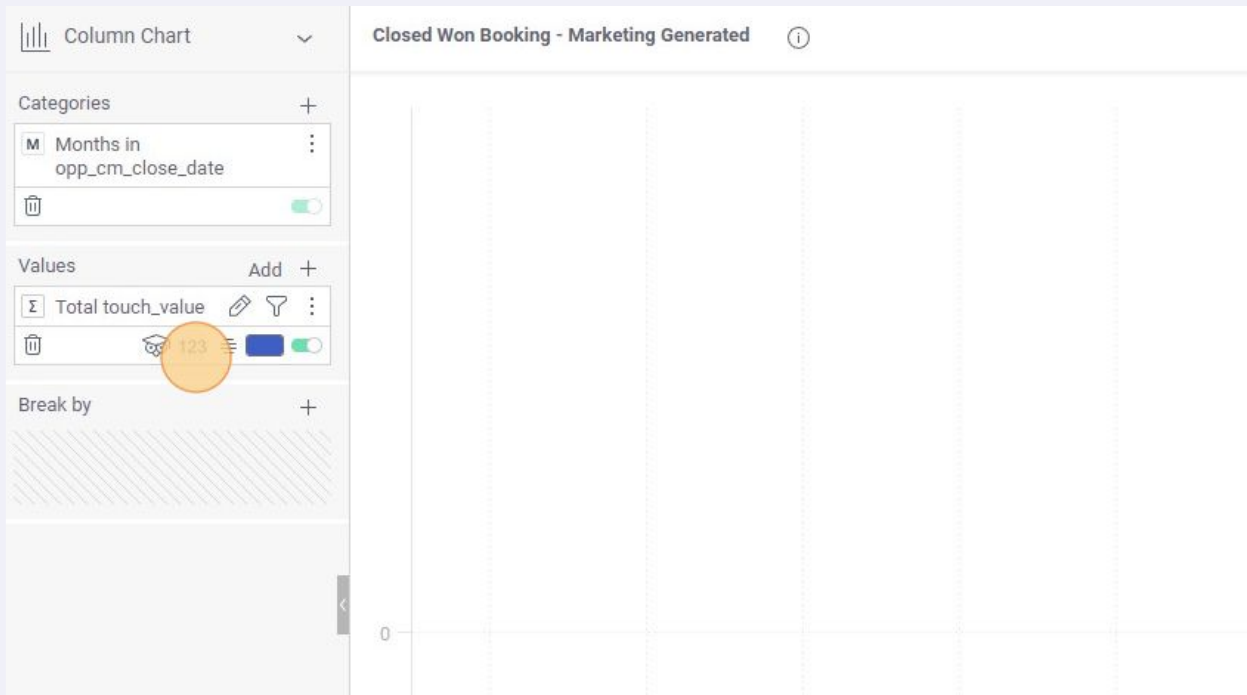
The screenshot shows the CaliberMind interface. At the top left is the CaliberMind logo. Below it, the chart type is set to 'Column Chart'. The chart title is 'Closed Won Booking - Marketing Generated'. The 'Categories' section shows 'Months in opp_cm_close_date' with a trash icon and a toggle switch. The 'Values' section is currently empty and has an 'Add +' button highlighted with an orange circle. The 'Break by' section is also empty. The main chart area is blank.

12 Type "touch_value"

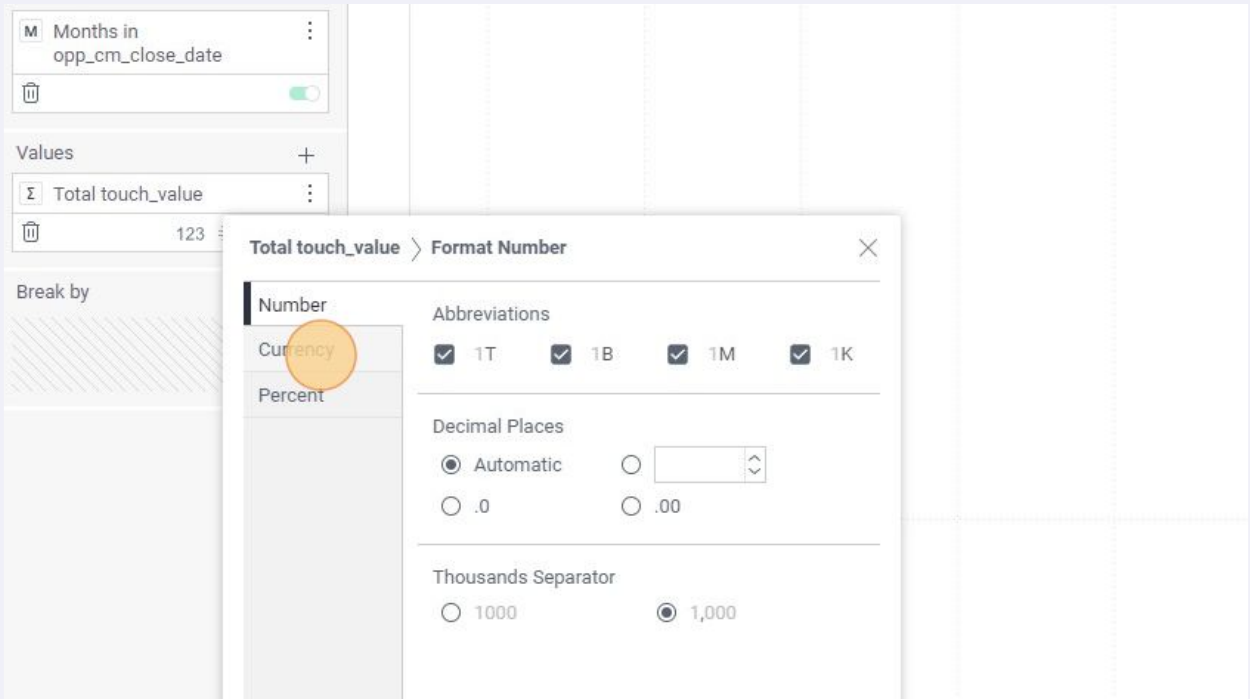
13 Select "Touch_value" from the drop-down list.



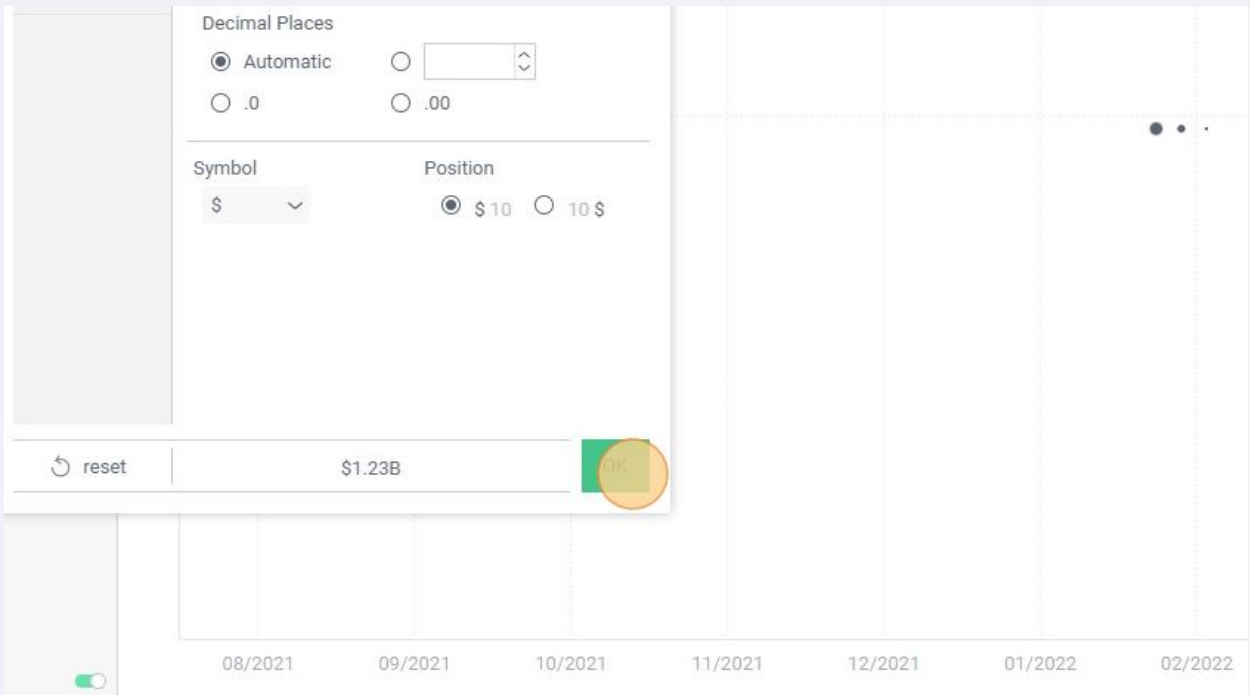
14 Click the 123 icon to change the format of the value to the currency.



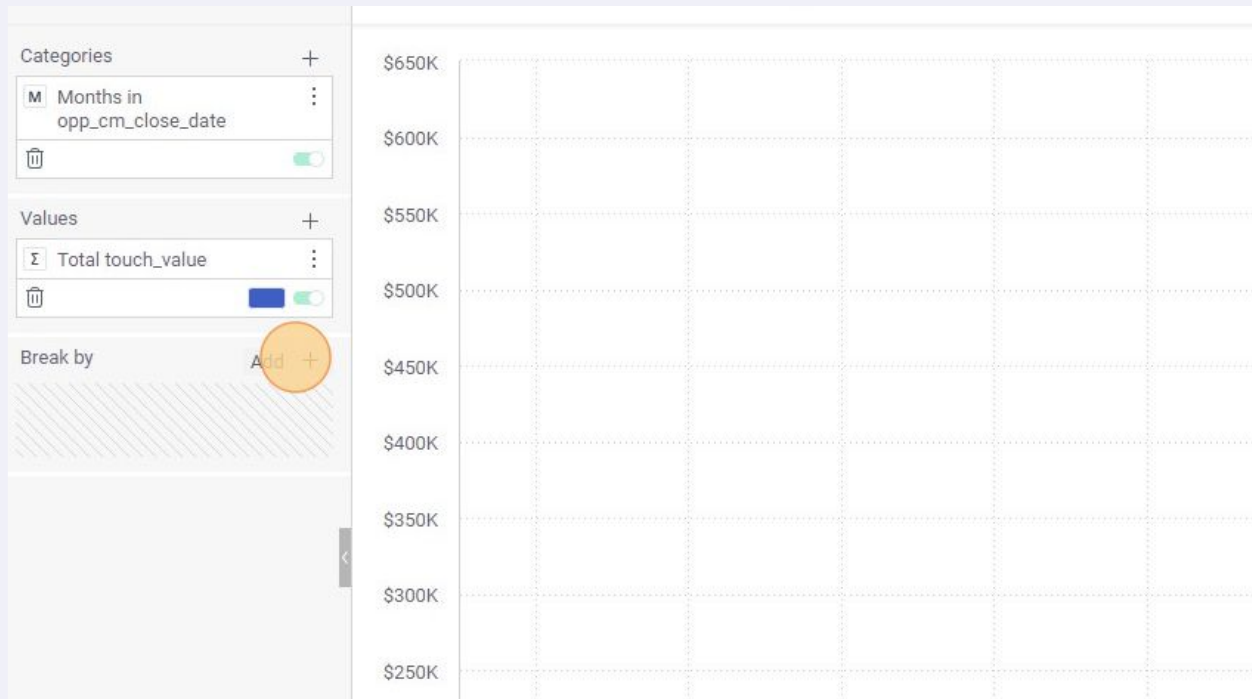
15 Click "Currency"



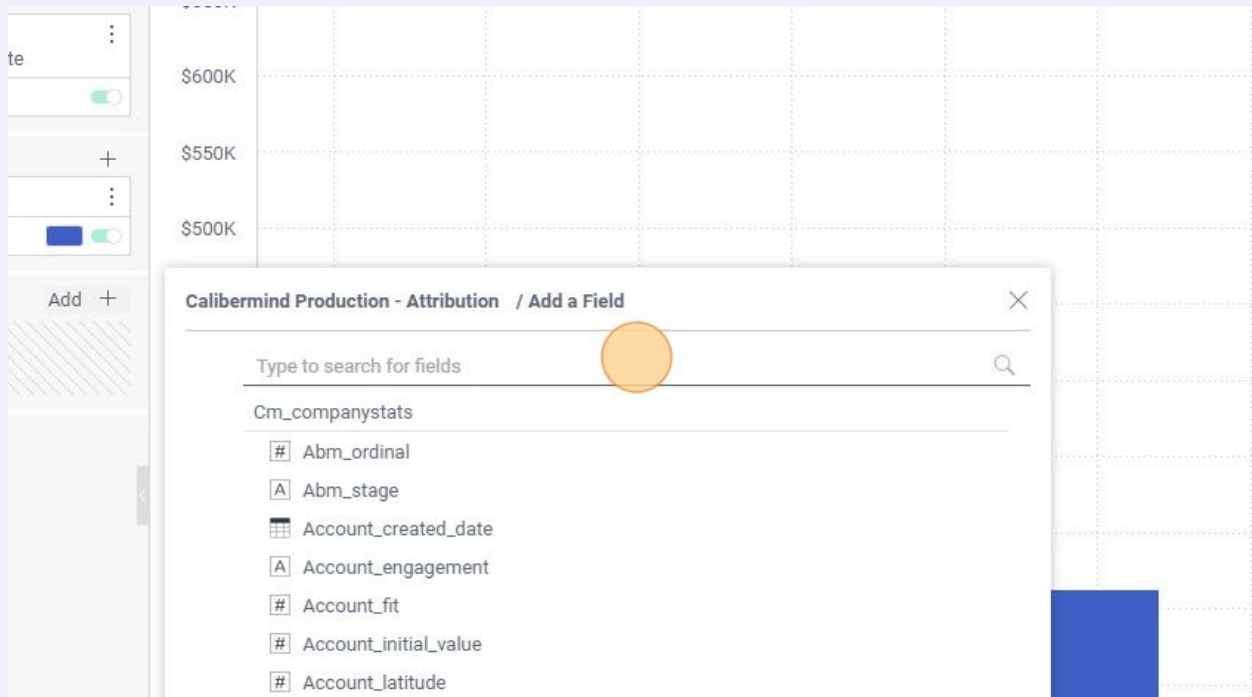
16 Click "OK"



17 Click to add a "Break by."



18 Click the "Type to search for fields" field.

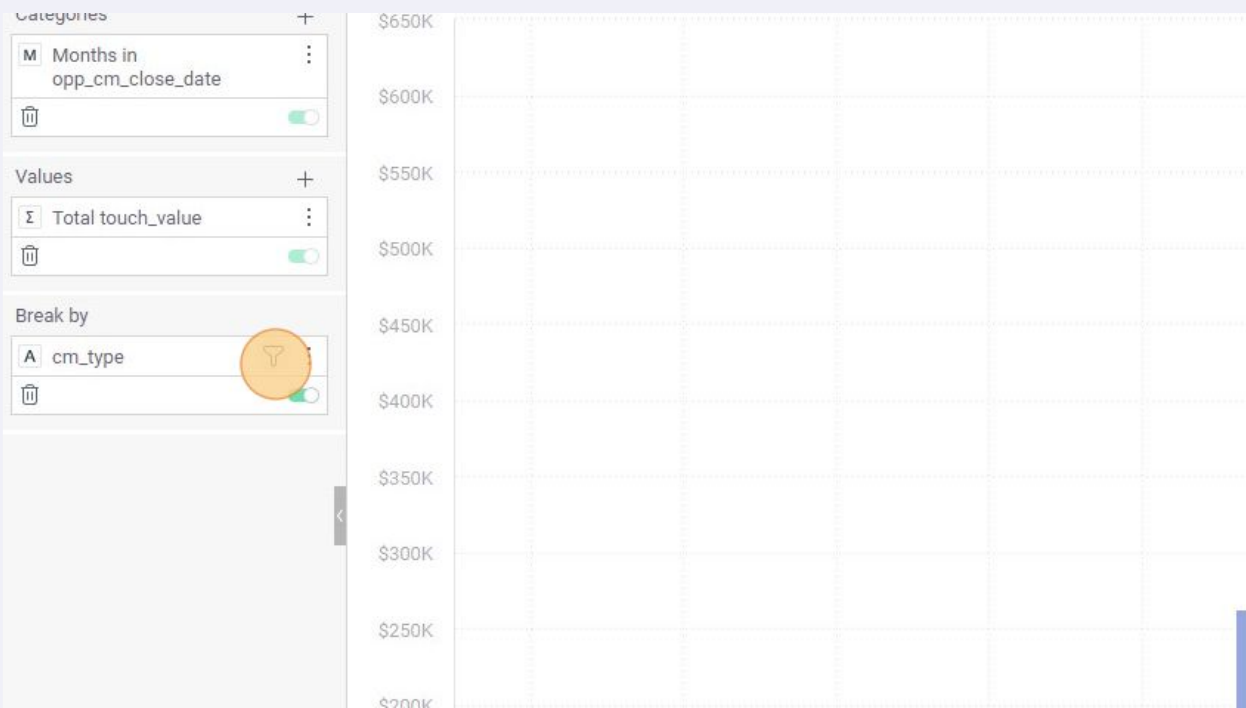


19 Type "cm_type"

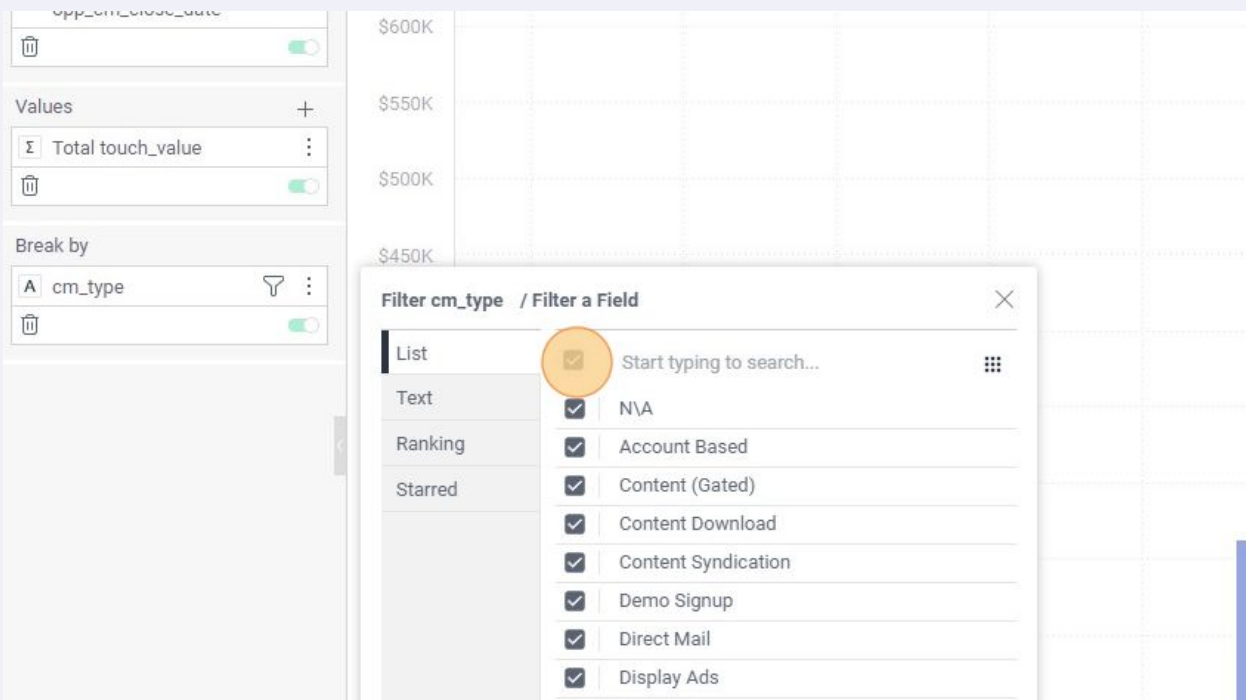
20 Select the "cm_type" field.

The screenshot displays a data visualization tool interface. On the left, there is a sidebar with two sections: 'Values' and 'Break by'. The 'Values' section contains a list with 'Σ Total touch_value' and a toggle switch. The 'Break by' section is currently empty. The main area shows a grid with two rows labeled '\$550K' and '\$500K'. A modal window titled 'Calibermind Production - Attribution / Add a Field' is open, showing a search bar with 'cm_type' entered. Below the search bar, a list of fields is shown, with 'Cm_type' highlighted in yellow. A magnifying glass icon is positioned over the 'Cm_type' field. The 'Cm_type' field is followed by 'Items' and 'More...'.

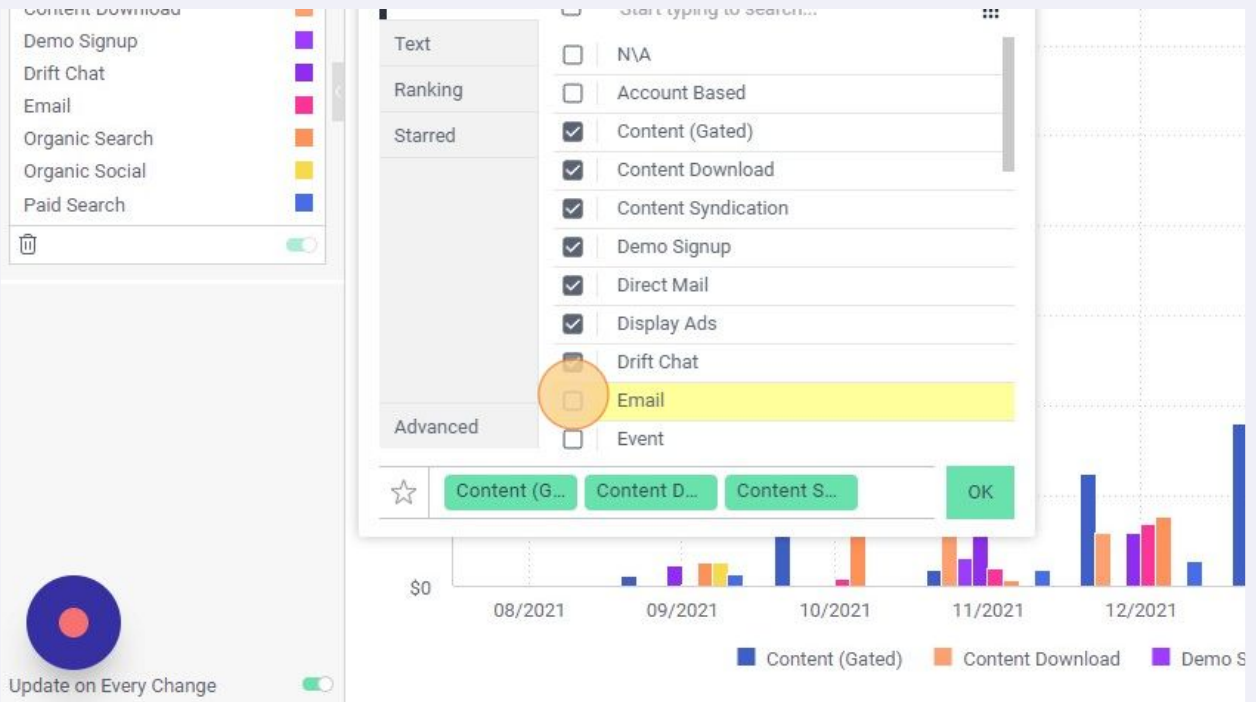
21 Click the funnel icon to select only the Marketing related types.



22 Click the top check-mark to deselect all values.



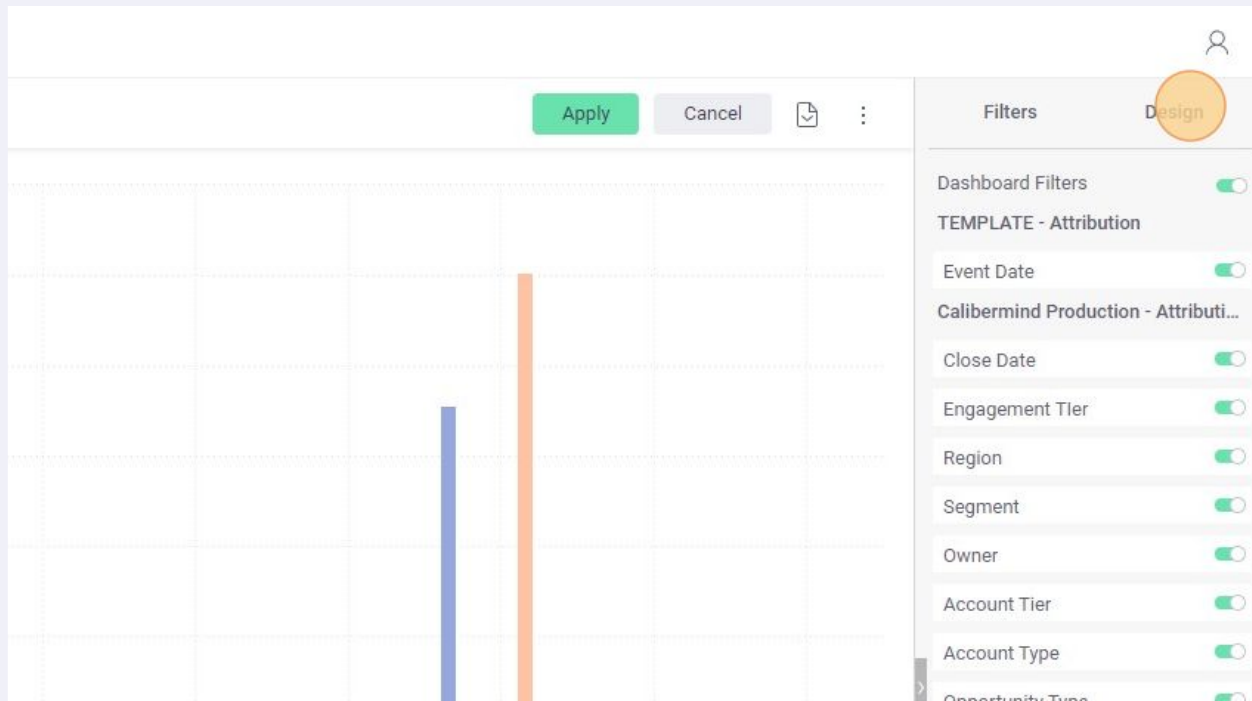
23 Select only the Marketing related types.



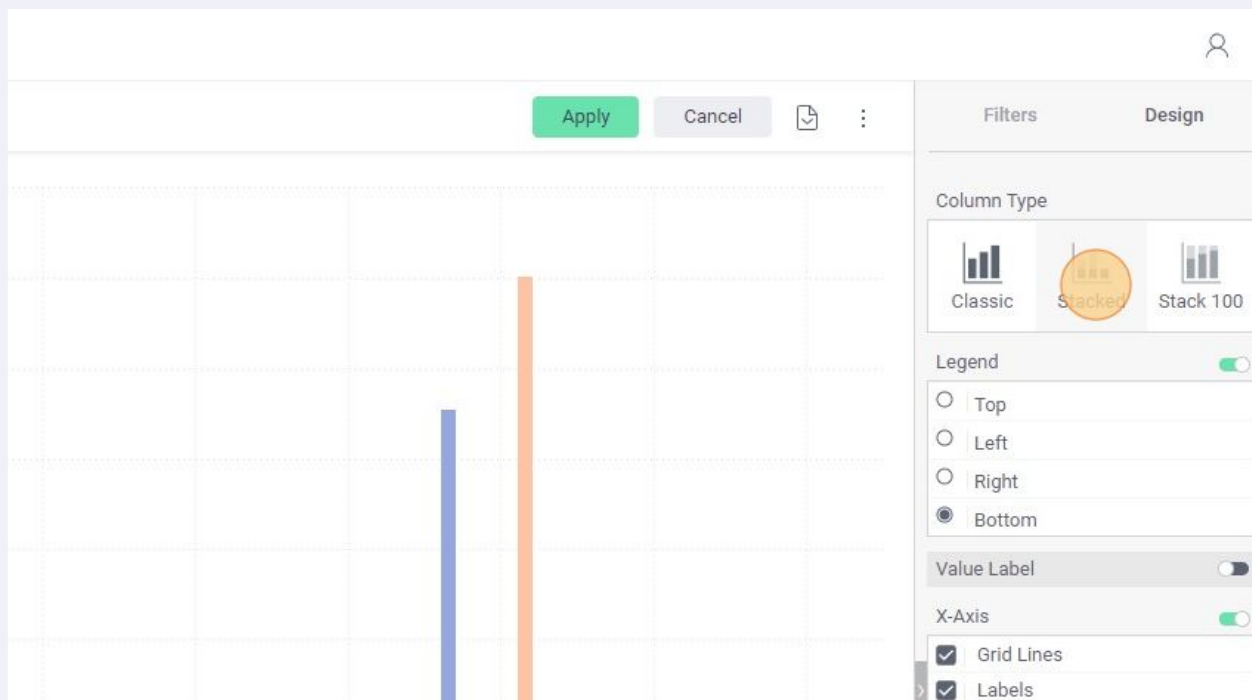
24 Click "OK" to save the selections.



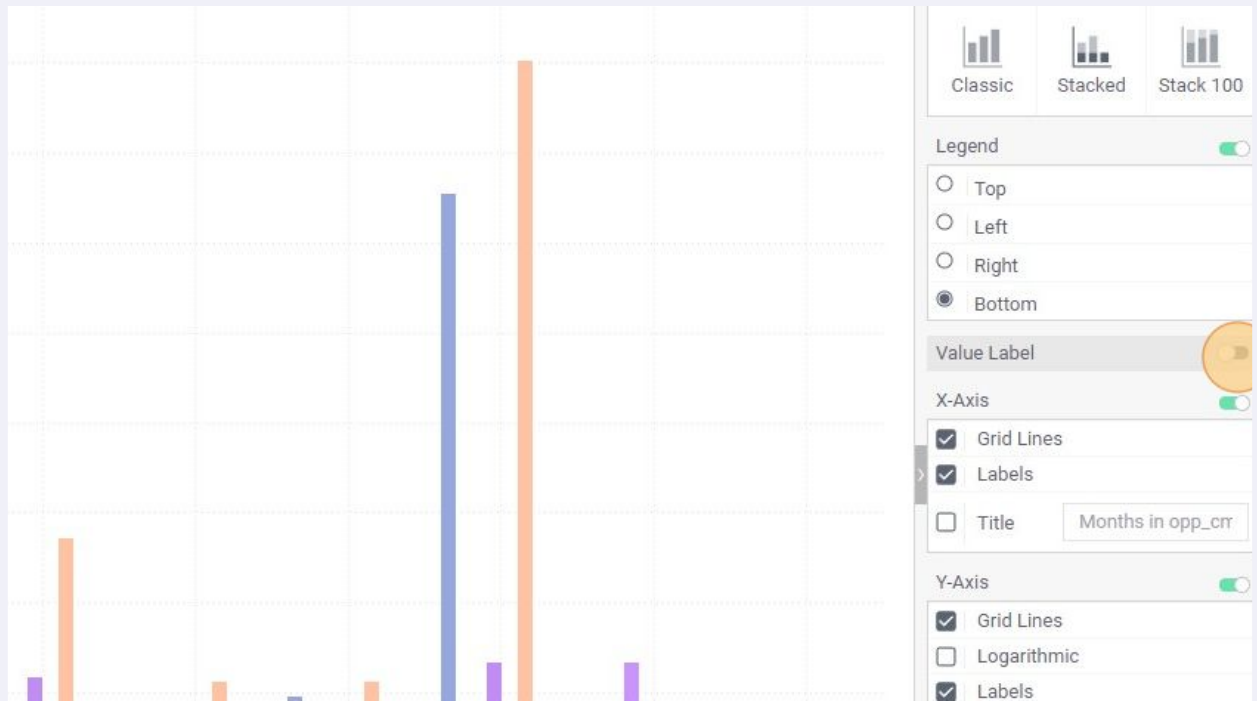
25 Click "Design"



26 Select the "Stacked" column type.



27 Turn on the "Value Label."



28 Click "Apply" to save your work and return to the dashboard.

