

Edit a Widget's Date Settings from Quarterly to Monthly

1

Navigate to <https://insights.calibermind.com/app/main#/dashboards/62e8211f0cd95100374e3c1e?folder=62e821100cd95100374e3c1b>



Confirm the Attribution Model and Aggregation Type settings are as desired before proceeding.

2

Click this dropdown to select an Attribution Model.

The screenshot shows the '1. Test Attribution Summary' widget in the CaliberMind Production - Attribution dashboard. The widget title is '1. Test Attribution Summary' and the dashboard title is 'Calibermind Production - Attribution'. The widget is currently set to 'W-Shaped' Attribution Model. The 'Apply' button is visible. Below the title, there are three summary cards: 'Opps w/ Attribution' with a value of 111, 'Pre-Opp Attribution' with a value of \$4,336,137, and 'Total Pipeline' with a value of #N/A. At the bottom, there is an 'Aggregation Type' section with a 'Close Date' dropdown menu and an 'Apply' button. The 'Date Groupings' section is also visible but empty.

Summary Card	Value
Opps w/ Attribution	111
Pre-Opp Attribution	\$4,336,137
Total Pipeline	#N/A

3 Click "APPLY"

The screenshot shows the 'Analytics' section of a software interface. At the top, it says '1. Test Attribution Summary' and 'Calibermind Production - Attribution'. Below this, there is a section for 'ADD TITLE' with 'Attribution Model' set to 'Even-Weighted'. A yellow circle highlights the 'APPLY' button. Below the model selection, there are three summary cards: 'Opps w/ Attribution' with the value '111', 'Pre-Opp Attribution' with the value '\$4,336,137', and 'Total Pipeline' with the value '#N/A'. At the bottom, there is a section for 'Aggregation Type' with a dropdown menu set to 'Close Date' and an 'Apply' button.

4 Click this dropdown to select the Aggregation Type.

This screenshot shows the same interface as the previous one, but with a yellow circle highlighting the 'Close Date' dropdown menu in the 'Aggregation Type' section. The summary cards now show 'Total Pipeline' as '\$59,40'. Below the 'Aggregation Type' section, there is a 'Tab Selector' with two buttons: 'Campaigns' and 'Campaign Type'. At the bottom, there is an 'Attribution' section with a legend for 'Post-Opp Attribution' (blue square) and 'Pre-Opp Attribution' (orange square). A value of '\$2.5M' is visible in the attribution section.

5 Click "Apply"

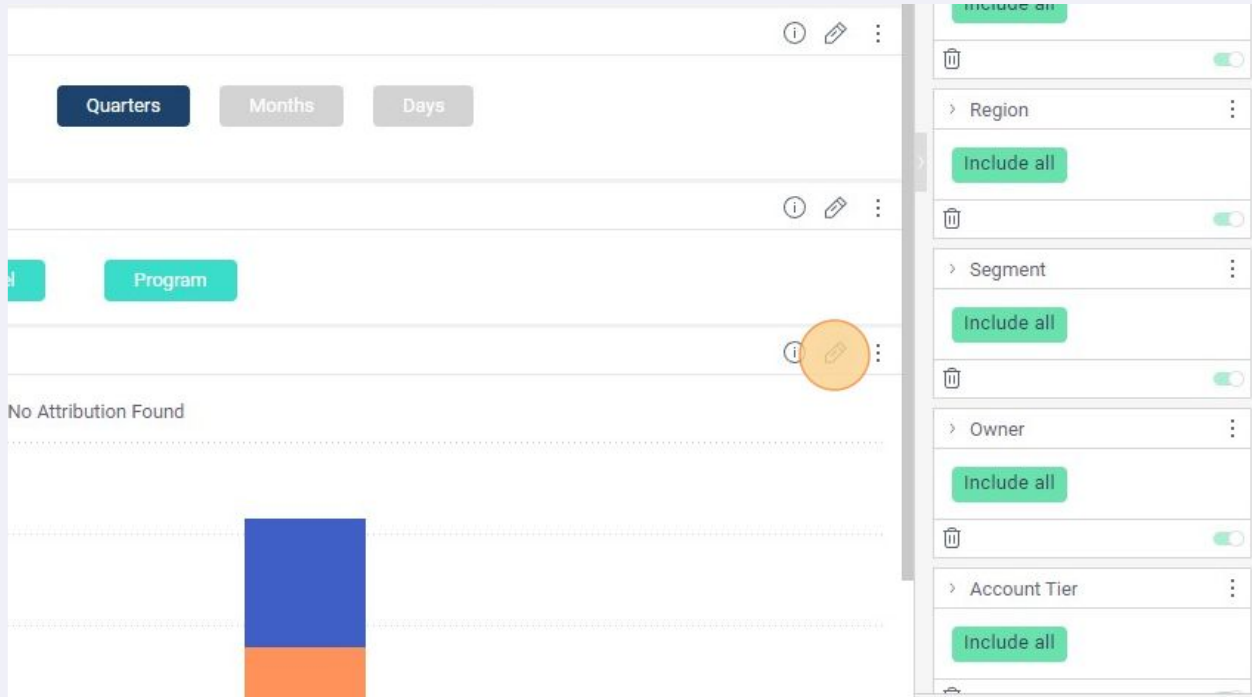
The screenshot displays a dashboard with three main metrics: 'Opps w/ Attribution' (111), 'Pre-Opp Attribution' (\$4,336,137), and 'Total Pipeline' (\$59,400). Below these is a settings panel for 'Aggregation Type' and 'Date Groupings'. A dropdown menu is set to 'Close Date', and an 'Apply' button is highlighted with a yellow circle. Further down, there is a 'Tab Selector' with buttons for 'Campaigns', 'Campaign Type', and 'Channel'. At the bottom, an 'Attribution' section shows a bar chart with a legend for 'Post-Opp Attribution' (blue), 'Pre-Opp Attribution' (orange), and 'N' (purple). A value of '\$2.5M' is visible on the left side of the chart.



Instructions to edit an existing widget to change the date settings from Quarterly to Monthly.

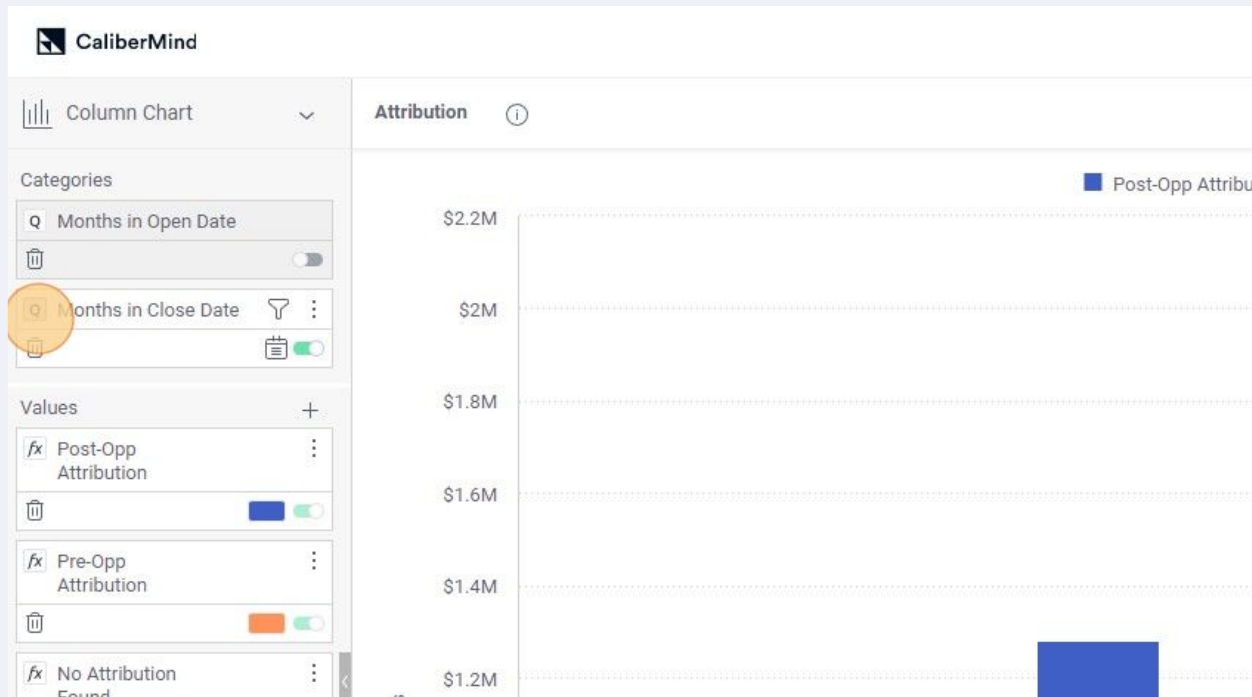
6

Click the pencil icon of the widget you want to edit. In this instance, I have selected the stacked chart.



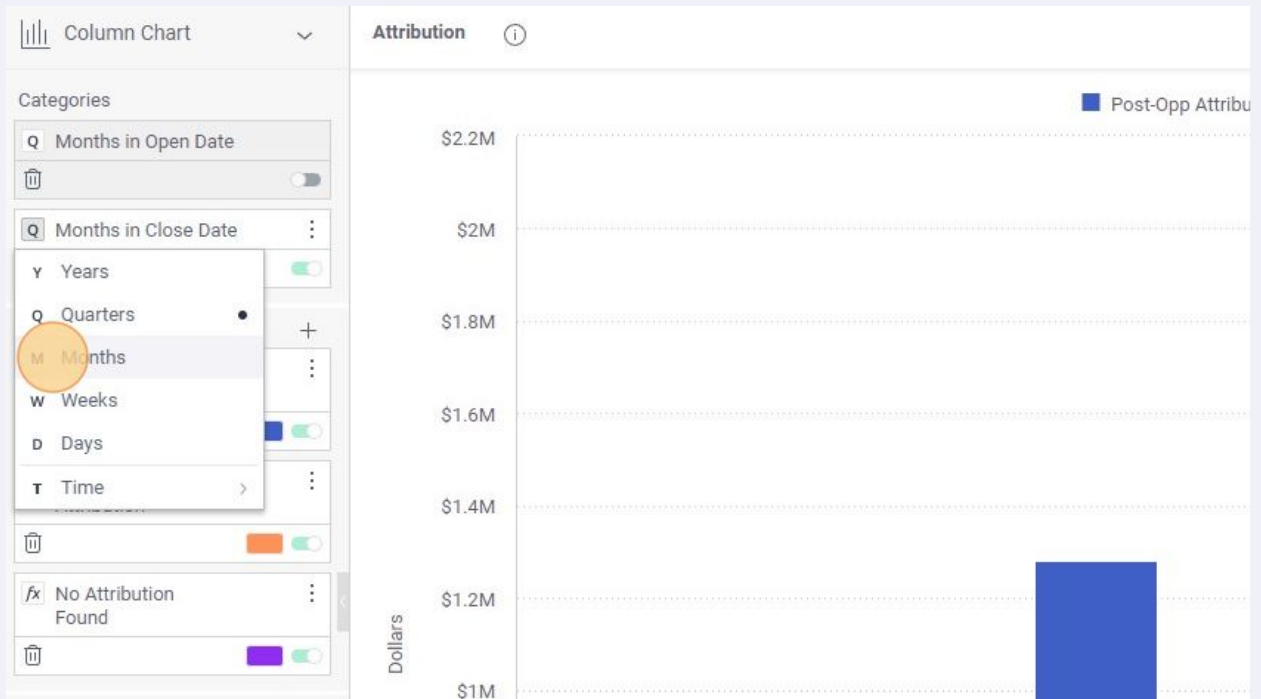
7

Click the Q on the top left of the category filter.



8

A drop-down of date settings will appear. Select the Months.



9

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

