

Table of Content

1. Installation

2. Installation Steps

3. Add an Item

3.1 Tile

1. Data
2. Display
3. Actions
4. Auto Update
5. Advance Configuration

3.2 Bar Chart

1. Data
2. Display
3. Actions
4. Target
5. Auto Update
6. Advance Configuration

3.3 Horizontal Bar Chart

1. Data
2. Display
3. Actions
4. Target
5. Auto Update
6. Advance Configuration

3.4 Line Chart

1. Data
2. Display
3. Actions
4. Target
5. Auto Update

6. Advance Configuration

3.5 Area Chart

1. Data
2. Display
3. Actions
4. Target
5. Auto Update
6. Advance Configuration

3.6 Pie Chart

1. Data
2. Display
3. Actions
4. Auto Update
5. Advance Configuration

3.7 Doughnut Chart

1. Data
2. Display
3. Actions
4. Auto Update
5. Advance Configuration

3.8 Polar Area Chart

1. Data
2. Display
3. Actions
4. Auto Update
5. Advance Configuration

3.9 List View

1. Data
2. Display
3. Actions
4. Target
5. Auto Update
6. Advance Configuration

3.10 KPI

1. Data & Data #2
2. Display
3. Target

4. Additional Features

1. Move and Duplicate a Dashboard Item
2. Resize the Dashboard Item
3. List View for Charts Data
4. Export & Import complete dashboard between different Databases
5. Use of %UID in domain filter to filter logged-in User Data
6. Auto-Refresh
7. Target Comparison
8. Quick Edit Mode
9. Ability to Edit the Parent Menu of the Dashboard
10. Dynamic Date Filter Range
11. Remove the Dashboard Item
12. Color Palette

5. Configurations

Dashboard Ninja

User Guide

1. Installation

Once you have downloaded the Dashboard Ninja, you will get a folder named “ks_dashboard_ninja”.

1. Copy and paste it to your Add-ons folder.
2. Click on the Update Apps list from the menu and now Dashboard Ninja will appear in the App list.
3. Go to the Apps menu, search for 'Dashboard Ninja', and click the Install button.
4. You are ready to use Dashboard Ninja.

2. Installation Steps

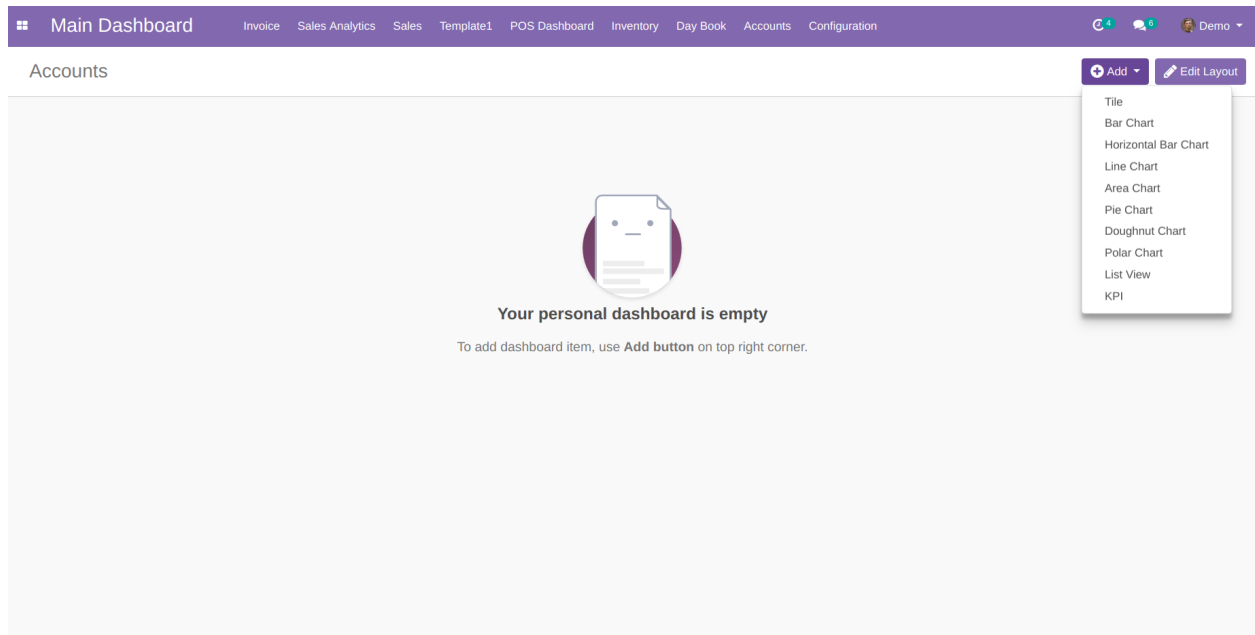
Steps

1. Please commit/push Dashboard Ninja code on GitHub which is associated with Odoo.sh.
2. Log-in and click on that branch on which you have committed Dashboard Ninja.
3. Click on the connect button then go to the app search for the Dashboard Ninja app and click on the install button.

3. Add an Item

Add a Dashboard Item

- Click on the '+Add' Button on the top right corner of your Dashboard screen.
- Once you click on the '+Add' Button, you will be asked to select the Dashboard Item Type.
- Choose from the 10 item types as provided by Dashboard Ninja.



3.1 Tile

Create A Dashboard Item As A Tile

If you select the Dashboard Item Type as a Tile, a pop screen or a dashboard item creation window will appear as given below:

My Dashboard

Account

Inventory

Configuration

2

6

My Company (San Francisco)

Marc Demo

New

Save

Discard

Name

Model

Company

Type

My Company (San Francisco)

Title

Data

Display

Actions

Auto Update

Advance Configuration

Record Value

0.00

Filter

Domain

Select a model to add a filter.

Bar Chart

Name

0

Note : Changing Layout midway will set the default icon colour and font colour for selected layout.

Note: The ones highlighted in purple are mandatory to fill. The Model field is the most important one to fill to save the dashboard item.

Category	Label	Description	Condition
General	Name	Label which will be displayed on the tile	
	Model	Select the model/table on which you want to create your item	
	Company	Display tile to a particular company	
	Type	Select the type as 'Tile'	
	Preview	Live Preview of the Tile at the right side	

Select the Model type to begin your dashboard creation process.

After selecting the Model, click on the ‘Edit Domain’ button to define the Domain for the Dashboard item.

For instance: If your Model is Sale Order, you can define the Domain as Sale Order where the total amount is greater than 100.

Once the Model is selected, you will notice five configurations further namely Data Display, Actions, Auto Update, & Advance Configuration.

1. Data

The 'Data' tab allows users to add/select the data for which they wish to display the results.

My Dashboard / New

Save Discard

Name

Model: Sales Order

Company: My Company (San Francisco)

Type: Title

Data Display

Record Type: Count, Sum, Average (selected)

Record Field: Title

Record Value: 0.00

Filter

Domain: Match all records

Date Filter Field: Creation Date (sale.order)

Date Filter Selection: Last 30 days

Include Period: 0

Same Period Previous Years: 0

Note : Changing Layout midway will set the default icon colour and font colour for selected layout.

Category	Label	Description	Condition
----------	-------	-------------	-----------

	Record Type	Allows you to show your data/record as a Count, Sum, or Average	
--	-------------	---	--

Data	Record Field	Allow you to select the field on which to apply the sum or average operation	It will only be visible when the Record Type is Sum or Average
	Record Value	Display exact value depending upon selected Record Type and Record Field	
	Domain	Allow you to add conditions to filter out your Data	<p>This Odoo default widget is only available in Odoo 11, 12, 13, 14, & 15 versions.</p> <p>Odoo 10 customers will need technical knowledge to add conditions.</p>
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed
	Date Filter Selection	Select the Date filter for which you want to filter out your item	If the None option is selected then only the Main Dashboard

		records/data	page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter

2. Display

The 'Display' tab will allow a user to configure the dashboard item on the basis of its color, layout, & more.

My Dashboard

Account

Inventory

Configuration

2

4

My Company (San Francisco)

Marc Demo

My Dashboard / New

Save

Discard

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Tile

Data

Display

Actions

Auto Update

Advance Configuration

English Format

Layout 1

Theme

✓

Background Color

Transparency :

Font Color


Transparency :

Icon Option

Default Icons

Upload Icon

Icon



Icon Color

Transparency :

Top Button Color

Transparency :

Sales Order

26

Note : Changing Layout midway will set the default icon colour and font colour for selected layout.

Category	Label	Description	Condition
----------	-------	-------------	-----------

Display	Number System	Track the data in your format with the pre-defined four Number system options	
	Layout	Choose the Layout for your dashboard item from the 6 available sets: Layout 1, 2, 3, 4, 5, & 6	
	Theme	A pre-configured set of 5 different colors i.e White, Blue, Green, Red, and Yellow. Select the Theme as per your choice	Get overridden if custom values are set in Background Color, Font Color & Icon Color

	Background Color	Allows you to set the background color from a color pop-up window. Also provides an option to set transparency.	
	Font Color	Allows you to set the font color from a color pop-up window. Also provides an option to set transparency.	
	Icon Option	<div>Allows you to choose the icon from a pop-up window.</div> <div>Allows you to upload your custom icon.</div>	<div>Default Icons</div> <div>Upload Icon</div>
	Icon	We have provided 29 pre-loaded Default Font	Use the search bar to search for other available Font

		Awesome 4.7.0 icons	Awesome icons.
	Icon Color	Allows you to choose the color of the icon. Also, provides an option to set transparency.	Only visible when Icon Option is chosen as Default
	Top Button Colorful	Allows you to set the distinct color of Top Buttons of the Tile. Helps you to edit, remove, move, or duplicate from the Main Dashboard	

3. Actions

The 'Actions' tab will allow a user to perform the vital action on the chosen item.

a.

My Dashboard

Account

Inventory

Configuration

2

8

My Company (San Francisco)

Marc Demo

New

Save

Discard

Name

Model

Company

Type

Sales Order

My Company (San Francisco)

Title

Data

Display

Actions

Auto Update

Advance Configuration

Client Action

Item Action

Sales Order

26

Note : Changing Layout midway will set the default icon colour and font colour for selected layout.

b.

My Dashboard

Account

Inventory

Configuration

2

8

My Company (San Francisco)

Marc Demo

New

Save

Discard

Name

Model

Company

Type

Sales Order

My Company (San Francisco)

Title

Data

Display

Actions

Auto Update

Advance Configuration

Client Action

Client Item Action

☒

Sales Order

26

Note : Changing Layout midway will set the default icon colour and font colour for selected layout.

Category	Label	Description	Condition
Actions	Client Action	Allow you to choose Client Item Action field	
	Client Item Action	Allows you to set the action of the item	Only visible when client action is

			selected
	Item Action	Allows you to set the action of the item	Only visible when client action is not selected

4. Auto Update

Update your dashboard results as per your choice of intervals.

a.

My DashboardAccountInventoryConfiguration

28My Company (San Francisco)Marc Demo

New

SaveDiscard

Name

ModelSales Order

CompanyMy Company (San Francisco)

TypeTitle

DataDisplayActionsAuto UpdateAdvance Configuration

Auto Update Type

☒ Update at every instance.

☐ Update after the selected interval

Show Live Update Pop Up

☐

Sales Order26

Note : Changing Layout midway will set the default icon colour and font colour for selected layout.

b.

My DashboardAccountInventoryConfiguration

28My Company (San Francisco)Marc Demo

New

SaveDiscard

Name

ModelSales Order

CompanyMy Company (San Francisco)

TypeTitle

DataDisplayActionsAuto UpdateAdvance Configuration

Auto Update Type

☐ Update at every instance.

☒ Update after the selected interval

Set Update Interval

✓

15 Seconds

30 Seconds

45 Seconds

1 minute

2 minute

5 minute

10 minute

Sales Order26

Note : Changing Layout midway will set the default icon colour and font colour for selected layout.

Category	Label	Description	Condition
Auto Update	Auto Update Type	Allows you to choose the 'Show Live Update Pop Up'	Update at every instance
		Allows you to choose 'Set Update Interval'	Update after the selected interval
	Show Live Update Pop Up	Allow you to see the notification pop of live updates of records	Update at every instance must be activated
	Set Update Interval	Allow you to select the interval to update the data.	Update it after 'Selected Interval' must be selected

5. Advance Configuration

My Dashboard

Account

Inventory

Configuration

2

6

My Company (San Francisco)

Marc Demo

New

Save

Discard

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Title

Data

Display

Actions

Auto Update

Advance Configuration

Apply Multiplier

☒

Multiplier

1.00

Sales Order

26

Note : Changing Layout midway will set the default icon colour and font colour for selected layout.

Category	Label	Description	Condition
Advance Configuration	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier	Insert the number you wish your results to get multiplied by	Visible when 'Apply Multiplier' action is selected

3.2 Bar Chart

Create A Dashboard Item As A Bar Chart

If you select the Dashboard Item Type as a Bar Chart, the 'Data Calculation Type' tab will appear.

Either you can select the 'Default Query' to get the dashboard results or select the 'Custom Query' to add custom chart values.

My Dashboard / New

Save Discard

Name

Model

Company

My Company (San Francisco)

Type

Bar Chart

Data Calculation Type

Default Query

Custom Query

Select a Model first.

Data Display Actions Auto Update Advance Configuration

Groups/Dimensions

Sort By Field

Sort Order

Record Limit Data Visibility

Filter

Domain Select a model to add a filter.

Category	Label	Description	Condition
General	Name	Label which will be displayed on the header of the item	
	Model	Select the model/table on which you want to create your item	
	Company	Display Bar Chart to a particular company	
	Type	Select the type as Bar Chart	

	Data Calculation Type	Allows you to create ‘Default Query’ or ‘Custom Query’	<div>Two types</div> <div>Default Query</div> <div>Custom Query</div>
	Preview	Live Preview of the Bar Chart	

1. Data

Once you select the Model, three important fields will appear:

- Measures
- Line Measure
- Data Type

The measures and Line Measure field will allow the user to select multiple values and corresponding to the selected fields, the dataset will start displaying for those values.

For instance:

Let's select the:

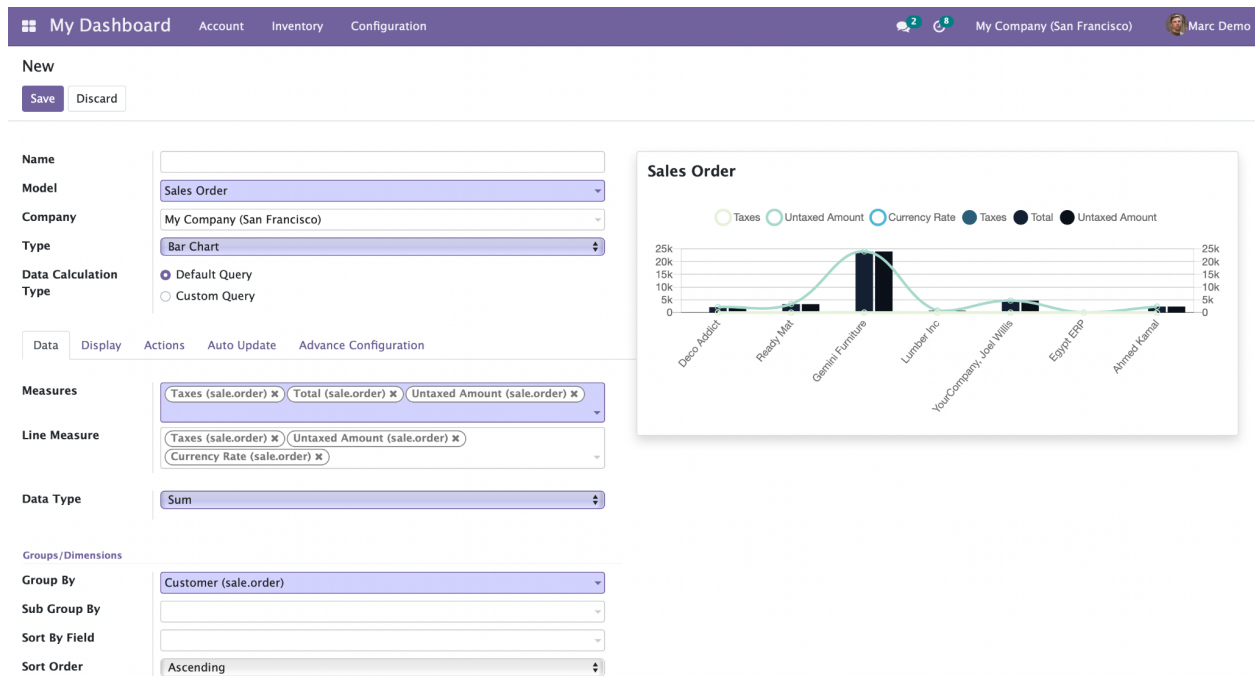
- Model as Sales Order
- Measures as Total (sale.order), Taxes (sale.order) and Untaxed Amount(sale.order)
- Line Measure as Taxes (sale.order) and Untaxed Amount (sale.order) and Currency Rate (sale.order)

Measures and Line Measure will show a list of fields related to the chosen model on the basis of the following attributes:

- Type: Integer, Float, or Monetary
- Store: True i.e. this field value must be stored in the database.

Note: Field name “id” is not allowed to show explicitly.

Once you select the Data Type as Sum, Count, or Average, it will start displaying the data respectively.



You will notice the following configuration options under Group/Dimensions tab:

- Group By
- Sub Group By
- Sort By Field
- Sort Order
- Record Limit Data Visibility

Note: Group By and Sub Group By fields allow you to group your selected Measure field data.

While selecting the Group By or Sub Group By field, if you select the field type as Date/Datetime Type, then you will notice a new field start displaying, i.e “ Group By Date/Sub Group By Date ”

Group By Date/Sub Group By Date field will allow you to group your data as per the options available:

- Minute

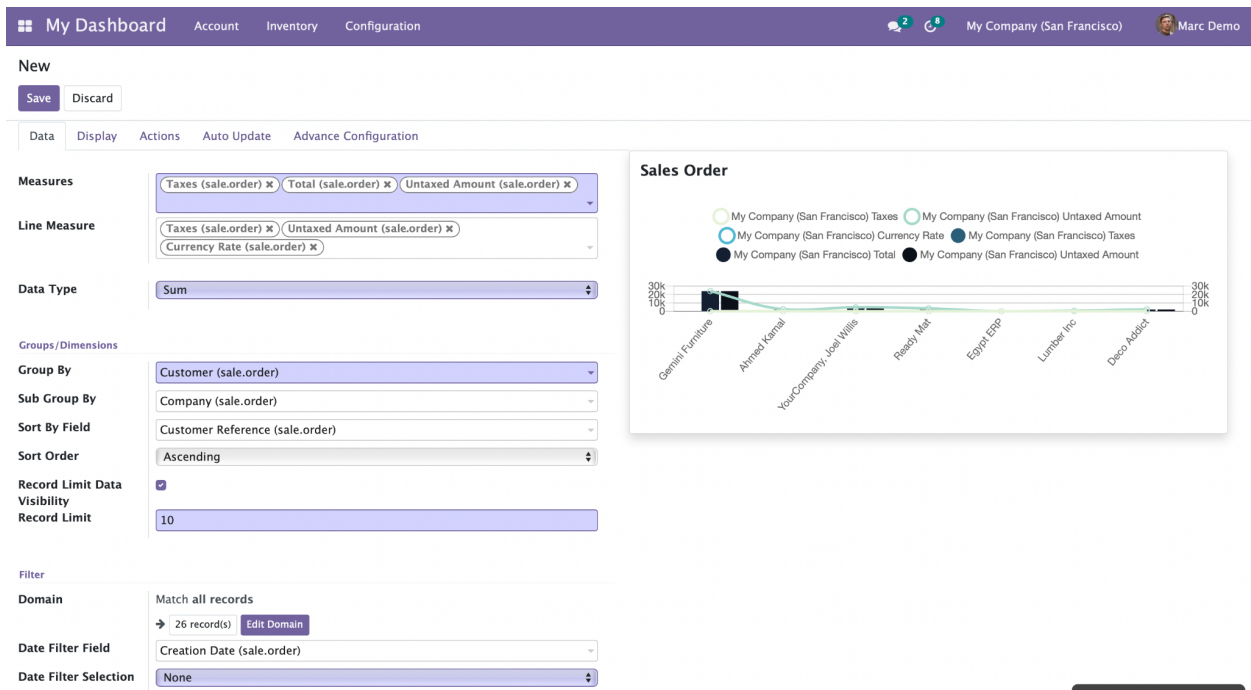
- Hour
- Day
- Week
- Month
- Quarter
- Year
- Month-Year

Select the ‘Sub Group By’ Field to further group your ‘Group By Field’ data.

For example, select the:

- Group By as Customer (sale.order)
- Sub Group By as Company (sale.order)

You can also select the Sort By Field, Sort Order, and Record Limit options specific to the dashboard item you’re currently making.



Category	Label	Description	Condition
----------	-------	-------------	-----------

	Measures	Allows you to select the fields for which you want to perform the calculations as per the selected Model	Only visible when Data type is Sum or Average
	Line Measure	Allows you to select the fields for which you want to display lines on the Bar Chart	Only visible when Data type is Sum or Average
	Data Type	Allows you to display your data as Sum, Count, or Average	
	Group By	Allows you to group your selected Measure fields data	
	Group By Date	Allows you to select the date option by which you wish to group the data. Options are Minute, Hour, Day, Week, Month,	Only visible when Date/DateTime field is chosen in Group By

Data		Quarter, Year, & Month-Year.	
	Sub Group By	Allows you to further group your Group By field data.	
	Sub Group By Date	Allows you to select the date option by which you wish to group the data. Options are Minute, Hour, Day, Week, Month, Quarter, & Year.	Only visible when Date/DateTime field is chosen in Sub Group By
	Sort By Field	It will allow you to select the field on which you want to sort the records/Data	
	Sort Order	Allows you to sort your data in Ascending or Descending order	
	Record Limit	Allows you to set limits to your records/data	Appear when the 'Record Limit Data Visibility' option is

			selected
	Domain	Allows you to add conditions to filter out your Data	<p>This Odoo default widget is only available in Odoo 11, 12, 13, 14, & 15 versions.</p> <p>Odoo 10 customers will need technical knowledge to add conditions.</p>
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed
	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter

2. Display

My Dashboard

Account

Inventory

Configuration

2

8

My Company (San Francisco)

Marc Demo

New

Save

Discard

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Bar Chart

Data Calculation Type

Default Query

Custom Query

Data

Display

Actions

Auto Update

Advance Configuration

Number System

English Format

Chart Color Palette

Neon

Stacked Bar Chart

☒

Show Data Value

☒

Show Custom Unit

☒

Select Unit Type

Monetary

Sales Order

My Company (San Francisco) Taxes

My Company (San Francisco) Untaxed Amount

My Company (San Francisco) Currency Rate

My Company (San Francisco) Taxes

My Company (San Francisco) Total

My Company (San Francisco) Untaxed Amount

\$24k

\$2.4k

\$4.7k

\$3.3k

\$0

\$750

\$2.1k

Gemma Furniture

Armed Kamaal

YourCompany, Jose Willie

Pelchy Mat

Egypt Egg

Lumber Inc

Deco Addict

Category	Label	Description	Condition
Display	Number System	Track the data in your format with the pre-defined four Number system options	
	Chart Color Palette	It will allow you to select the color from 4 pre-defined options: Default, Cool, Warm & Neon	

	Stacked Bar Chart	The results will appear in a stacked form, one above the another	
	Show Data Value	Read the graph easily by selecting the ‘Show Data Value’	
	Show Custom Unit	Display the custom unit in the Bar Chart	Only appear when ‘Show Custom Unit’ is selected
	Select Unit Type	Choose Unit type as Monetary or Custom	Only appear when ‘Show Custom Unit’ is selected

3. Actions

New

Save Discard

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Bar Chart

Data Calculation Type

Default Query

Custom Query

Data Display Actions Auto Update Advance Configuration

Action Gro...	Group By D...	Item Type	Sort By Fiel...	Sort Order	Record ...
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div>0</div>
Add a line					

Below action will be performed at the end of the Drill Down Action

Client Action

Item Action



Category	Label	Description	Condition
----------	-------	-------------	-----------

Actions	Action lines	Allow you to choose different data at a time to perform an action, to go in deep you can choose the number of lines as per your need	This field is applicable on every type except Tile, KPI, and List
	Client Action	Allows you to set the client action on the item, chosen by the client	Only visible when client action is selected

	Client Item Action	Allows you to set the action of the item	Only visible when client action is selected
	Item Action	Allows you to set the action of the item	Item Action

4. Target

If you select your Group By field as Date Type, for example: Let's select the Group By field as a "Creation Date", you will notice a Target tab will appear beside the Data, Display, & Actions tabs.

Note: Select the 'Enable Target' option for further configurations.

If you enable the option, "Show Target as Line", it will start showing the target as a Line.

If you input the value for the "Standard Target" option, then you will be able to view your Data target as per the input value, as shown above screenshot.

My Dashboard

Account

Inventory

Configuration

2

6

My Company (San Francisco)

Marc Demo

New

Save Discard

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Bar Chart

Data Calculation Type

☒ Default Query
 ☐ Custom Query

Data

Display

Actions

Target

Auto Update

Advance Configuration

Enable Target

☒

Show Target As Line

☒

Standard Target

60.00

All Target Lines Changes Will be reflected on Chart after saving the record and pagination will be ignore .

Date

Value

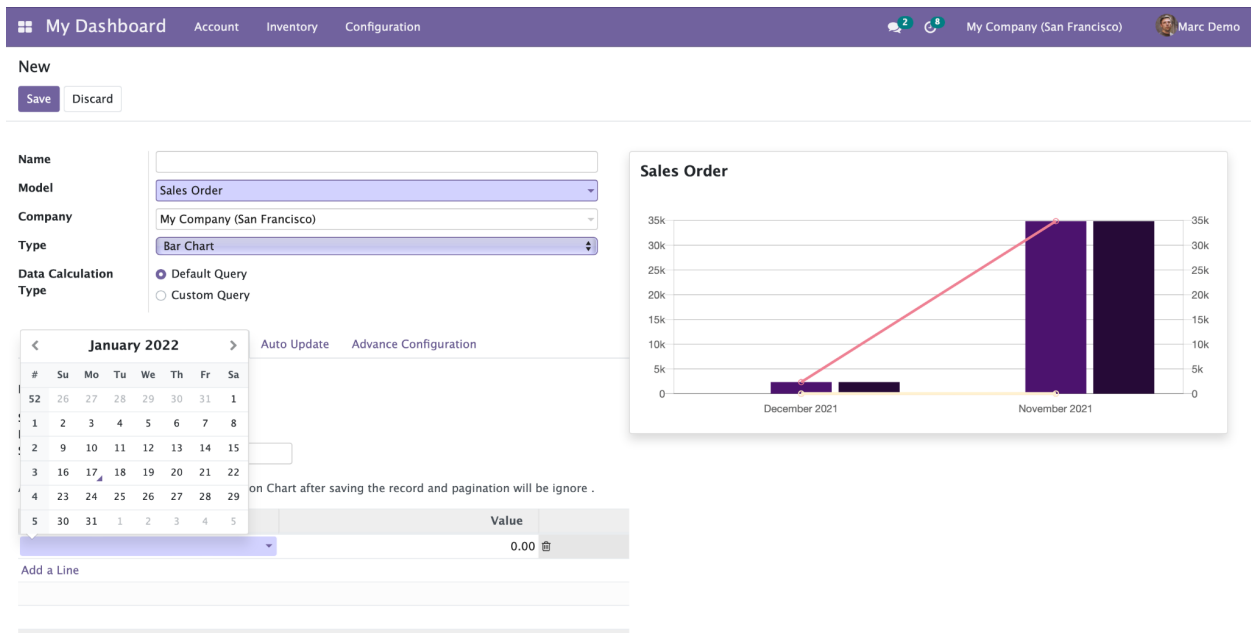
Add a Line

Sales Order

Month	Bar 1	Bar 2	Target
December 2021	~5k	~10k	60.00
November 2021	~30k	~35k	35k

If you wish to see the target with different data and date ranges, then you need to add them by clicking on “Add a Line”.

On clicking the Add a Line, you will be asked to select the Date and the value for which you want to see the target.



You can add multiple lines to see the target values as per your need.

Category	Label	Description	Condition
	Enable Target	On enabling the option, you will be able to see the Target values	The target tab is only visible when the Date/Datetime field is selected in Group By

Target	Show Target as Line	Allows you to set your target values which you wish to see as a line on the chart.	Visible only when you enable the Enable Target
	Standard Target	Default target value if any value is empty for a particular date period	
	Date	Allows you to set the date on which you wish to see your Target values.	Visible only when you check the Enable Target option
	Value	Allows you to set the Target value respective to the date.	Visible only when you check the Enable Target option

5. Auto Update

New

Save Discard

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Bar Chart

Data Calculation Type

Default Query

Custom Query

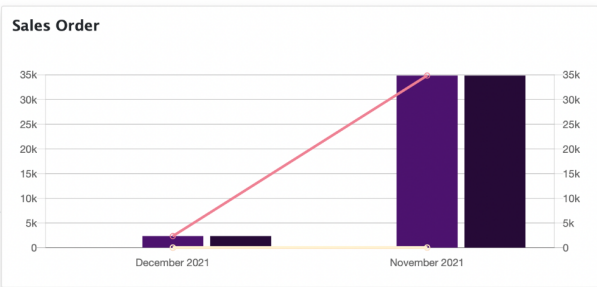
Data Display Actions Target Auto Update Advance Configuration

Auto Update Type

Update at every instance.

Update after the selected interval

Show Live Update Pop Up



Category	Label	Description	Condition
----------	-------	-------------	-----------

Auto Update	Auto Update Type	<div>Allows you to choose the ‘Show Live Update Pop Up’</div> <div>Allows you to choose ‘Set Update Interval’</div>	<div>Update at every instance</div> <div>Update after the selected interval</div>
	Show Live Update Pop Up	Allow you to see the notification pop of live updates of records	Update at every instance must be activated

	Set Update Interval	Allow you to select the interval to update the data.	Update it after ‘Selected Interval’ must be selected
--	----------------------------	---	---

6. Advance Configuration

My Dashboard

Account

Inventory

Configuration

2

6

My Company (San Francisco)

Marc Demo

New

Save Discard

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Bar Chart

Data Calculation Type

☒ Default Query
 ☐ Custom Query

Data

Display

Actions

Target

Auto Update

Advance Configuration

Show Legend

☒

Cumulative Field

Total (sale.order)

Cumulative As Line

☒

Show Records

☒

Apply Multiplier

☒

Multiplier Lines

Multiplier Field	Multiplier
Taxes (sale.order)	1.00
Total (sale.order)	1.00
Untaxed Amount (sale.order)	1.00

Sales Order

Category	Label	Description	Condition
	Show Legend	Show or hide a bar chart legend	Appears when ‘Show Legend’ is enabled
	Cumulative Field	A user can see information acquired over a period of time using the	

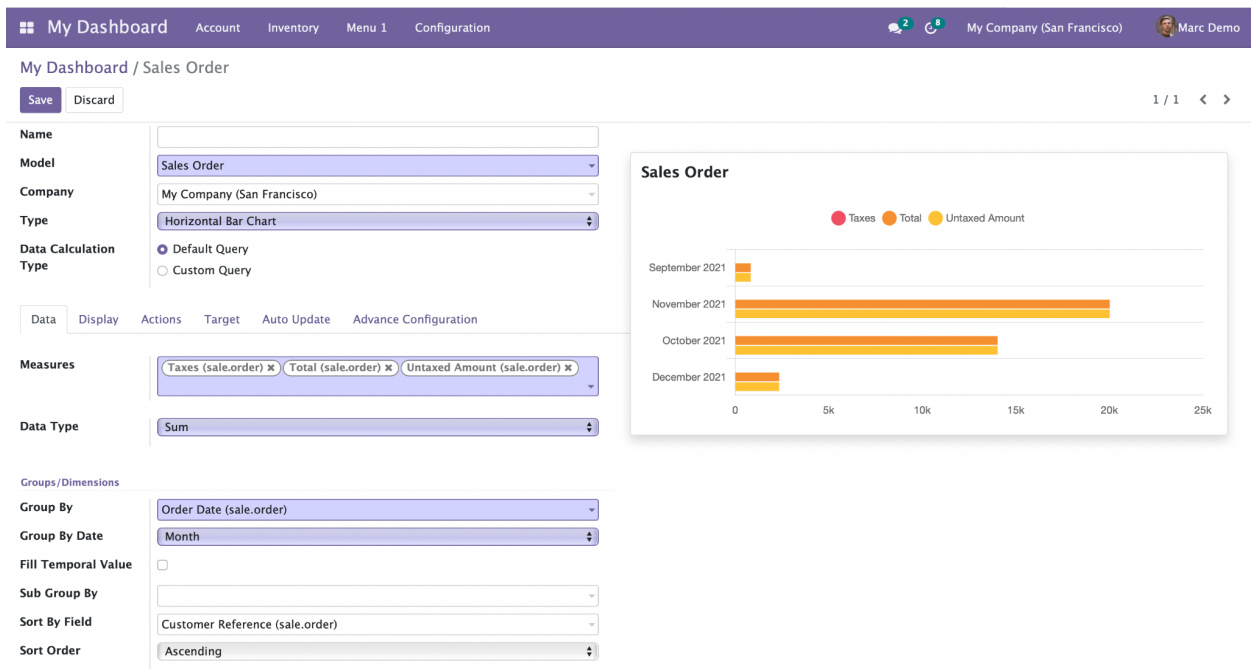
Advance Configuration		Cumulative Field option	
	Cumulative As Line	A user can see information acquired over a period of time as a line using the 'Cumulative As Line' option	
	Show Records	To display records of your data, select the 'Show Records' option	
	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier Lines	Insert the number you wish your results to get multiplied by	Visible when 'Apply Multiplier' action is selected

3.3 Horizontal Bar Chart

Create a Dashboard Item as a Horizontal Bar Chart

Follow the steps as mentioned in the previous sections to get the Horizontal Bar Chart of your inserted values.

The following results would look like this:



Note: In Horizontal Bar Chart, the Line Measure option is not present.

Category	Label	Description	Condition
General	Name	Label which will be displayed on the header of the item	
	Model	Select the model/table on which you want to create your item	

	Company	Display Bar Chart to a particular company	
	Type	Select the type as Bar Chart	
	Data Calculation Type	Allows you to create ‘Default Query’ or ‘Custom Query’	<div>Two types</div> <div>Default Query</div> <div>Custom Query</div>
	Preview	Live Preview of the Horizontal Bar Chart	

1. Data

My Dashboard

Account

Inventory

Menu 1

Configuration

2

My Company (San Francisco)

Marc Demo

My Dashboard / Sales Order

Save

Discard

1 / 1 < >

Data

Display

Actions

Target

Auto Update

Advance Configuration

Measures

Taxes (sale.order) X Untaxed Amount (sale.order) X Total (sale.order) X

Data Type

Sum

Groups/Dimensions

Group By

Order Date (sale.order)

Group By Date

Month

Fill Temporal Value

☐

Sub Group By

Sort By Field

Ascending

Sort Order

☒ Descending

Record Limit Data Visibility

☐

Filter

Domain

Match all records

26 record(s)

Edit Domain

Date Filter Field

Creation Date (sale.order)

Date Filter Selection

None

Sales Order

Taxes

Untaxed Amount

Total

September 2021

November 2021

October 2021

December 2021

0

5k

10k

15k

20k

25k

Category	Label	Description	Condition
	Measures	Allows you to select the fields for which you want to perform the calculations as per the selected Model	Only visible when Data type is Sum or Average
	Data Type	Allows you to display your data as Sum, Count, or Average	
	Group By	Allows you to group your selected Measure fields data	
	Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, Year, & Month-Year.</p>	Only visible when Date/DateTime field is chosen in Group By

Data	Fill Temporal Value	Allows you to show data in the detailed form	
	Sub Group By	Allows you to further group your Group By field data.	
	Sub Group By Date	Allows you to select the date option by which you wish to group the data. Options are Minute, Hour, Day, Week, Month, Quarter, & Year.	Only visible when Date/DateTime field is chosen in Sub Group By
	Sort By Field	It will allow you to select the field on which you want to sort the records/Data	
	Sort Order	Allows you to sort your data in Ascending or Descending order	

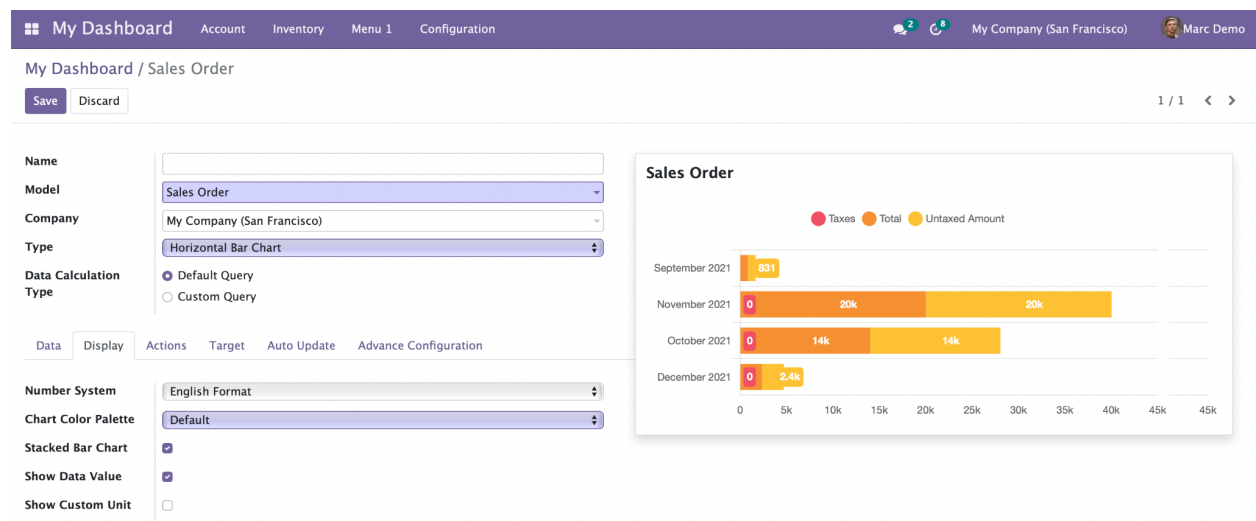
	Record Limit	Allows you to set limits to your records/data	Appear when the 'Record Limit Data Visibility' option is selected
	Domain	Allows you to add conditions to filter out your Data	This Odoo default widget is only available in Odoo 11, 12, 13, 14, & 15 versions. Odoo 10 customers will need technical knowledge to add conditions.
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed
	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter

	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
--	-----------------	---	--

2. Display

Use the ‘Stacked Bar Chart’ or ‘Show Data Value’ to make your chart look more interactive and informative.

After applying the required conditions in all six tabs, you can get the desired Preview to track your important business data.



Category	Label	Description	Condition
	Number System	Track the data in your format with the pre-defined four Number	

Display		system options	
	Chart Color Palette	It will allow you to select the color from 4 pre-defined options: Default, Cool, Warm & Neon	
	Stacked Bar Chart	The results will appear in a stacked form, one above the another	
	Show Data Value	Read the graph easily by selecting the 'Show Data Value'	
	Show Custom Unit	Display the custom unit in the Bar Chart	Only appear when 'Show Custom Unit' is selected
	Select Unit Type	Choose Unit type as Monetary or Custom	Only appear when 'Show Custom Unit' is selected

3. Actions

To further modify your chart, the 'Action' tab is beneficial.

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Horizontal Bar Chart

Data Calculation Type

Default Query

Custom Query

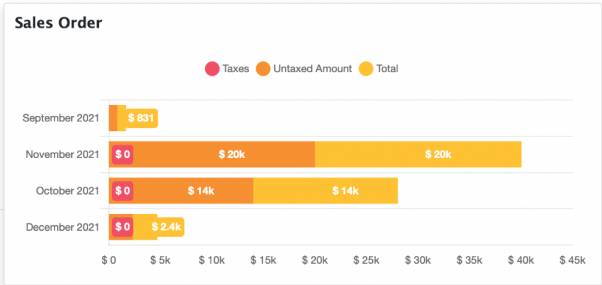
Data Display Actions Target Auto Update Advance Configuration

Action Gro...	Group By D...	Item Type...	Sort By Fiel...	Sort Order	Record Lim...
Total (sale.ord...		Horizontal		Ascending	0
Add a line					

Below action will be performed at the end of the Drill Down Action

Client Action

Client Item Action



Category	Label	Description	Condition
----------	-------	-------------	-----------

Actions	Action lines	Allow you to choose different data at a time to perform an action, to go in deep you can choose the number of lines as per your need	This field is applicable on every type except Tile, KPI, and List
	Client Action	Allows you to set the client action on the item, chosen by the client	Only visible when client action is selected

	Client Item Action	Allows you to set the action of the item	Only visible when client action is selected
	Item Action	Allows you to set the action of the item	Item Action

4. Target

Target helps you to see how many business goals you have achieved for a particular time.

My Dashboard

Account

Inventory

Menu 1

Configuration

2

6

My Company (San Francisco)

Marc Demo

My Dashboard / Sales Order

Save

Discard

1 / 1 < >

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Horizontal Bar Chart

Data Calculation Type

Default Query

Custom Query

<

January 2022

>

#

Su

Mo

Tu

We

Th

Fr

Sa

52

26

27

28

29

30

31

1

1

2

3

4

5

6

7

8

2

9

10

11

12

13

14

15

3

16

17

18

19

20

21

22

4

23

24

25

26

27

28

29

5

30

31

1

2

3

4

5

Auto Update

Advance Configuration

on Chart after saving the record and pagination will be ignore .

Value

0.00

Add a Line

Sales Order

Target

Taxes

Untaxed Amount

Total

September 2021

\$ 831

November 2021

\$ 0

\$ 20k

\$ 20k

October 2021

\$ 0

\$ 14k

\$ 14k

December 2021

\$ 0

\$ 2.4k

\$ 0

\$ 5k

\$ 10k

\$ 15k

\$ 20k

\$ 25k

\$ 30k

\$ 35k

\$ 40k

\$ 45k

Category	Label	Description	Condition
----------	-------	-------------	-----------

Target	Enable Target	On enabling the option, you will be able to see the Target	The target tab is only visible when the Date/Datetime
---------------	----------------------	---	--

		values	field is selected in Group By
	Standard Target	Default target value if any value is empty for a particular date period	
	Date	Allows you to set the date on which you wish to see your Target values.	Visible only when you check the Enable Target option
	Value	Allows you to set the Target value respective to the date.	Visible only when you check the Enable Target option

5. Auto Update

To stay updated with the changes made in the data, try the 'Auto Update' option.

My Dashboard / Sales Order

Save

Discard

1 / 1 < >

Name

Model

Company

Type

Data Calculation Type

Sales Order

My Company (San Francisco)

Horizontal Bar Chart

Default Query

Custom Query

Data

Display

Actions

Target

Auto Update

Advance Configuration

Auto Update Type

Show Live Update Pop Up

Update at every instance.

Update after the selected interval

☒

Sales Order

Taxes

Untaxed Amount

Total

September 2021

November 2021

October 2021

December 2021

\$ 831

\$ 0\$ 20k\$ 20k

\$ 0\$ 14k\$ 14k

\$ 0\$ 2.4k

\$ 0

\$ 5k

\$ 10k

\$ 15k

\$ 20k

\$ 25k

\$ 30k

\$ 35k

\$ 40k

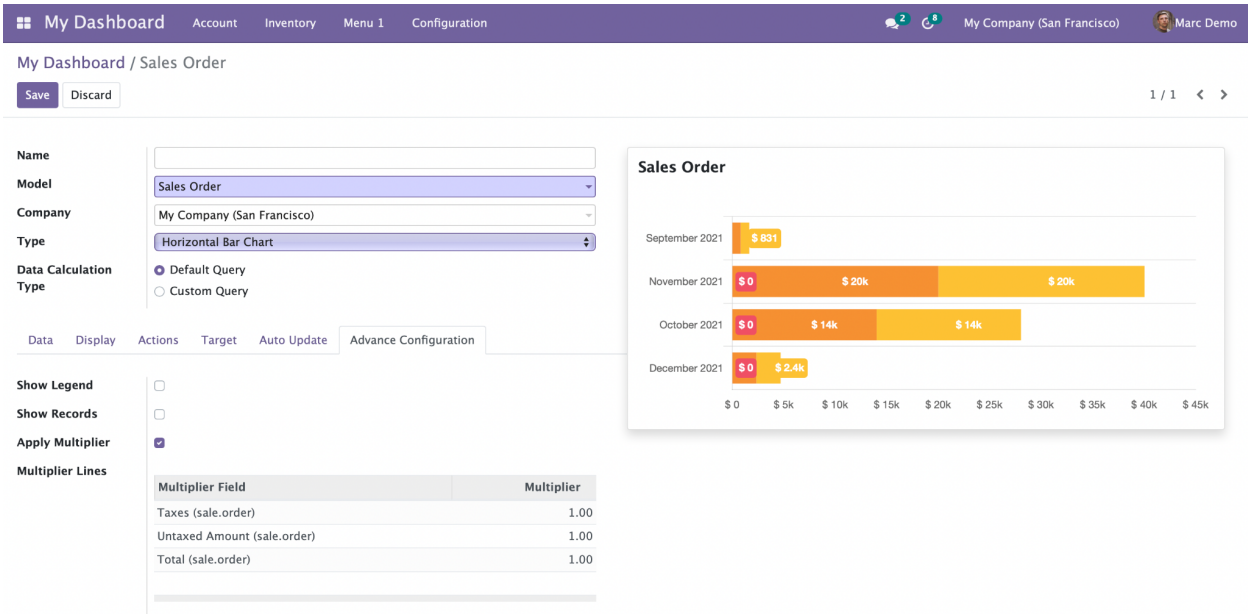
\$ 45k

Category	Label	Description	Condition
Auto Update	Auto Update Type	Allows you to choose the ‘Show Live Update Pop Up’	Update at every instance
		Allows you to choose ‘Set Update Interval’	Update after the selected interval
	Show Live Update Pop Up	Allow you to see the notification pop of live updates of	Update at every instance must be activated

		records	
	Set Update Interval	Allow you to select the interval to update the data.	Update it after ‘Selected Interval’ must be selected

6. Advance Configuration

Do advance configurations to get the exact data chart as per your need.



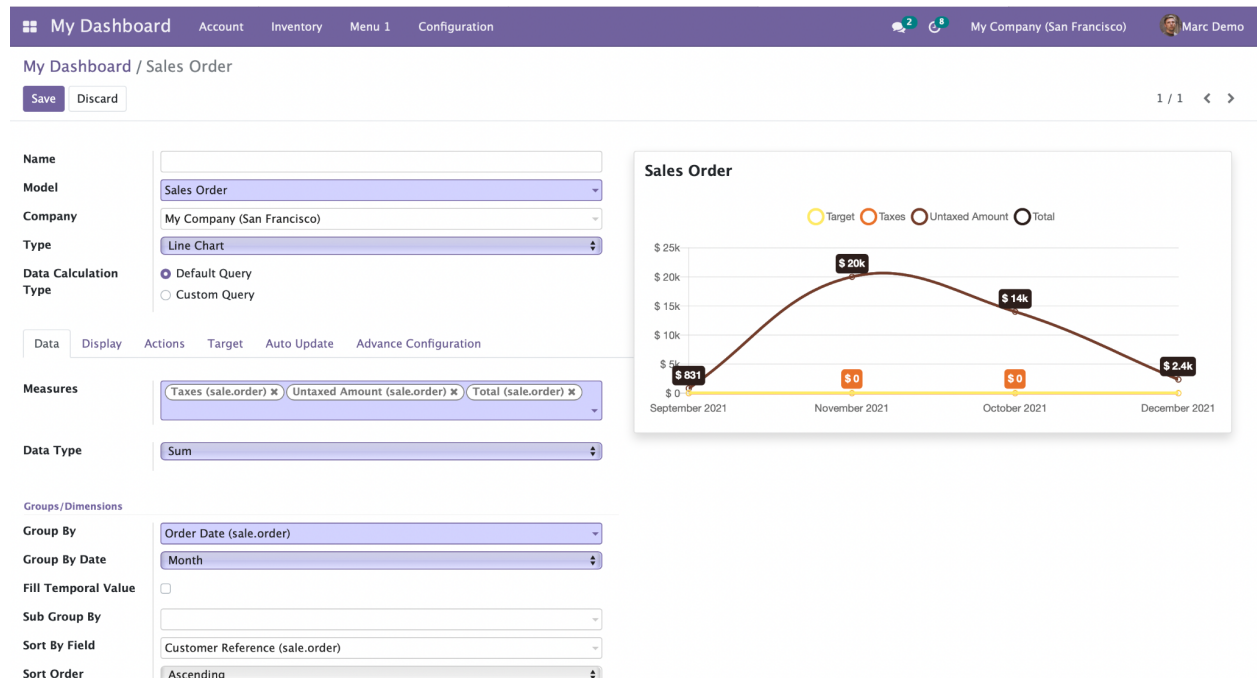
Category	Label	Description	Condition
	Show Legend	Show or hide a bar chart legend	Appears when ‘Show Legend’ is enabled

Advance Configuration	Show Records	To display records of your data, select the 'Show Records' option	
	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier	Insert the number you wish your results to get multiplied by	Visible when 'Apply Multiplier' action is selected

3.4 Line Chart

Create A Dashboard Item As A Line Chart

If you select chart type as the 'Line Chart' followed by all the previous steps, you will get results like this:



Category	Label	Description	Condition
General	Name	Label which will be displayed on the header of the item	
	Model	Select the model/table on which you want to create your item	
	Company	Display Bar Chart to a particular company	

	Type	Select the type as Bar Chart	
	Data Calculation Type	Allows you to create ‘Default Query’ or ‘Custom Query’	<div>Two types</div> <div>Default Query</div> <div>Custom Query</div>
	Preview	Live Preview of the Line Chart	

1. Data

	Measures	Allows you to select the fields for which you want to perform the calculations as per the selected Model	Only visible when Data type is Sum or Average
	Data Type	Allows you to display your data as Sum, Count, or Average	
	Group By	Allows you to group your selected Measure fields data	

Data	Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, Year, & Month-Year.</p>	Only visible when Date/DateTime field is chosen in Group By
	Fill Temporal Value	Allows you to show data in the detailed form	
	Sub Group By	Allows you to further group your Group By field data.	
	Sub Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, & Year.</p>	Only visible when Date/DateTime field is chosen in Sub Group By

	Sort By Field	It will allow you to select the field on which you want to sort the records/Data	
	Sort Order	Allows you to sort your data in Ascending or Descending order	
	Record Limit	Allows you to set limits to your records/data	Appear when the 'Record Limit Data Visibility' option is selected
	Domain	Allows you to add conditions to filter out your Data	This Odoo default widget is only available in Odoo 11, 12, 13, 14, & 15 versions. Odoo 10 customers will need technical knowledge to add conditions.
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed

	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	<div>Include Period</div> <div>Same Period Previous Years</div>	<div>It helps you to show the previous date data than the current one</div> <div>It allows you to track the data of the current date but in the previous year</div>	Only visible when the 'Date Filter Selection' is other than None.

2. Display

Display	Number System	Track the data in your format with the pre-defined four Number system options	
	Chart Color Palette	It will allow you to select the color from 4 pre-defined options: Default, Cool, Warm & Neon	
	Stacked Bar Chart	The results will appear in a stacked form, one above the another	
	Show Data Value	Read the graph easily by selecting the ‘Show Data Value’	
	Show Custom Unit	Display the custom unit in the Bar Chart	Only appear when ‘Show Custom Unit’ is selected
	Select Unit Type	Choose Unit type as Monetary or	Only appear when ‘Show Custom Unit’ is

		Custom	selected
--	--	---------------	-----------------

3. Actions

Actions	Action lines	Allow you to choose different data at a time to perform an action, to go in deep you can choose the number of lines as per your need	This field is applicable on every type except Tile, KPI, and List
	Client Action	Allows you to set the client action on the item, chosen by the client	Only visible when client action is selected
	Client Item Action	Allows you to set the action of the item	Only visible when client action is selected
	Item Action	Allows you to set the action of the item	Item Action

4. Target

Target	Enable Target	On enabling the option, you will be able to see the Target values	The target tab is only visible when the Date/Datetime field is selected in Group By
	Standard Target	Default target value if any value is empty for a particular date period	
	Date	Allows you to set the date on which you wish to see your Target values.	Visible only when you check the Enable Target option
	Value	Allows you to set the Target value respective to the date.	Visible only when you check the Enable Target option

5. Auto Update

	Auto Update Type	<div>Allows you to choose the 'Show Live Update Pop Up'</div> <div></div>	<div>Update at every instance</div>
--	-------------------------	---	-------------------------------------

Auto Update		Allows you to choose 'Set Update Interval'	Update after the selected interval
	Show Live Update Pop Up	Allow you to see the notification pop of live updates of records	Update at every instance must be activated
	Set Update Interval	Allow you to select the interval to update the data.	Update it after 'Selected Interval' must be selected

6. Advance Configuration

	Show Legend	Show or hide a bar chart legend	Appears when 'Show Legend' is enabled
	Show Records	To display records of your data, select the 'Show Records' option	

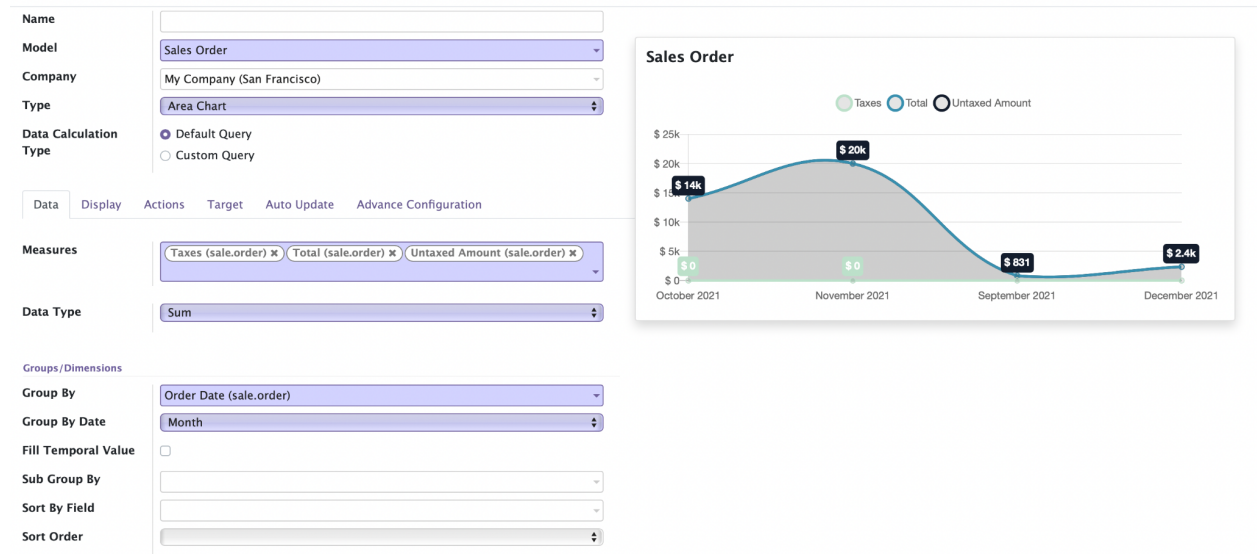
Advance Configuration	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier	Insert the number you wish your results to get multiplied by	Visible when ‘Apply Multiplier’ action is selected

3.5 Area Chart

Create A Dashboard Item As An Area Chart

If you need to show the rise and fall of data over a period of time, select Dashboard Item as an Area Chart.

Follow the steps mentioned earlier and get the desired results.



Sales Order

Taxes

Total

Untaxed Amount

\$14k

\$20k

\$0

\$0

\$831

\$2.4k

October 2021

November 2021

September 2021

December 2021

Category	Label	Description	Condition
General	Name	Label which will be displayed on the header of the item	
	Model	Select the model/table on which you want to create your item	
	Company	Display Bar Chart to a particular company	
	Type	Select the type as Bar Chart	

	Data Calculation Type	Allows you to create ‘Default Query’ or ‘Custom Query’	<div>Two types</div> <div>Default Query</div> <div>Custom Query</div>
	Preview	Live Preview of the Area Chart	

1. Data

	Measures	Allows you to select the fields for which you want to perform the calculations as per the selected Model	Only visible when Data type is Sum or Average
	Data Type	Allows you to display your data as Sum, Count, or Average	
	Group By	Allows you to group your selected Measure fields data	

Data	Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, Year, & Month-Year.</p>	Only visible when Date/DateTime field is chosen in Group By
	Fill Temporal Value	Allows you to show data in the detailed form	
	Sub Group By	Allows you to further group your Group By field data.	
	Sub Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, & Year.</p>	Only visible when Date/DateTime field is chosen in Sub Group By

	Sort By Field	It will allow you to select the field on which you want to sort the records/Data	
	Sort Order	Allows you to sort your data in Ascending or Descending order	
	Record Limit	Allows you to set limits to your records/data	Appear when the 'Record Limit Data Visibility' option is selected
	Domain	Allows you to add conditions to filter out your Data	This Odoo default widget is only available in Odoo 11, 12, 13, 14, &15 versions. Odoo 10 customers will need technical knowledge to add conditions.
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed

	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	<div>Include Period</div> <div>Same Period Previous Years</div>	<div>It helps you to show the previous date data than the current one</div> <div>It allows you to track the data of the current date but in the previous year</div>	Only visible when the 'Date Filter Selection' is other than None.

2. Display

Display	Number System	Track the data in your format with the pre-defined four Number system options	
	Chart Color Palette	It will allow you to select the color from 4 pre-defined options: Default, Cool, Warm & Neon	
	Stacked Bar Chart	The results will appear in a stacked form, one above the another	
	Show Data Value	Read the graph easily by selecting the ‘Show Data Value’	
	Show Custom Unit	Display the custom unit in the Bar Chart	Only appear when ‘Show Custom Unit’ is selected
	Select Unit Type	Choose Unit type as Monetary or	Only appear when ‘Show Custom Unit’ is

		Custom	selected
--	--	---------------	-----------------

3. Actions

Actions	Action lines	Allow you to choose different data at a time to perform an action, to go in deep you can choose the number of lines as per your need	This field is applicable on every type except Tile, KPI, and List
	Client Action	Allows you to set the client action on the item, chosen by the client	Only visible when client action is selected
	Client Item Action	Allows you to set the action of the item	Only visible when client action is selected
	Item Action	Allows you to set the action of the item	Item Action

4. Target

Target	Enable Target	On enabling the option, you will be able to see the Target values	The target tab is only visible when the Date/Datetime field is selected in Group By
	Standard Target	Default target value if any value is empty for a particular date period	
	Date	Allows you to set the date on which you wish to see your Target values.	Visible only when you check the Enable Target option
	Value	Allows you to set the Target value respective to the date.	Visible only when you check the Enable Target option

5. Auto Update

	Auto Update Type	<div>Allows you to choose the 'Show Live Update Pop Up'</div> <div></div>	<div>Update at every instance</div>
--	-------------------------	---	-------------------------------------

Auto Update		Allows you to choose 'Set Update Interval'	Update after the selected interval
	Show Live Update Pop Up	Allow you to see the notification pop of live updates of records	Update at every instance must be activated
	Set Update Interval	Allow you to select the interval to update the data.	Update it after 'Selected Interval' must be selected

6. Advance Configuration

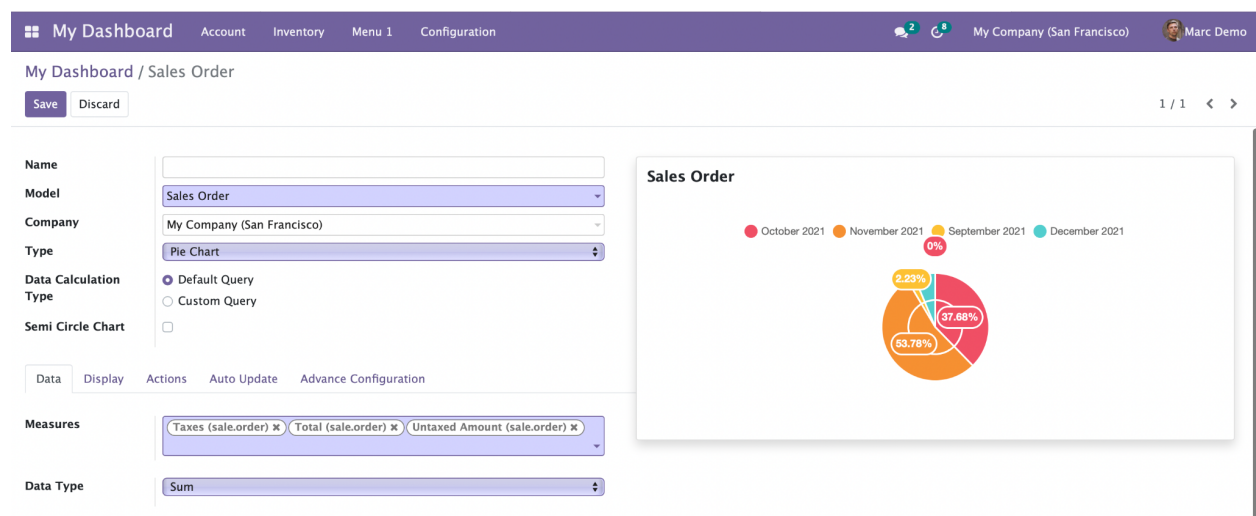
Advance Configuration	Show Legend	Show or hide a bar chart legend	Appears when 'Show Legend' is enabled
	Show Records	To display records of your data, select the 'Show Records' option	

	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier	Insert the number you wish your results to get multiplied by	Visible when ‘Apply Multiplier’ action is selected

3.6 Pie Chart

Create A Dashboard Item As A Pie Chart

To display your data in an interactive way, try out the Pie Chart. Follow the steps as mentioned earlier and track your data with a Pie Chart as shown below:



If you need to create a Semi Doughnut Chart, check the ‘Semi Circle Chart’ option and save. The results will be displayed as given below:

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Pie Chart

Data Calculation

Default Query

Custom Query

Semi Circle Chart

☒

Data

Display

Actions

Auto Update

Advance Configuration

Measures

Taxes (sale.order) X

Total (sale.order) X

Untaxed Amount (sale.order) X

Data Type

Sum

Sales Order

October 2021

November 2021

September 2021

December 2021

Month	Percentage
October 2021	37.68%
November 2021	53.78%
September 2021	2.23%
December 2021	2.23%
Other	0%

Category	Label	Description	Condition
General	Name	Label which will be displayed on the header of the item	
	Model	Select the model/table on which you want to create your item	
	Company	Display Bar Chart to a particular company	
	Type	Select the type as Bar Chart	

	Data Calculation Type	Allows you to create ‘Default Query’ or ‘Custom Query’	<div>Two types</div> <div>Default Query</div> <div>Custom Query</div>
	Semi Circle Chart	Convert your Doughnut Chart into Semi Doughnut Chart	

1. Data

	Measures	Allows you to select the fields for which you want to perform the calculations as per the selected Model	Only visible when Data type is Sum or Average
	Data Type	Allows you to display your data as Sum, Count, or Average	
	Group By	Allows you to group your selected Measure fields data	

Data	Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, Year, & Month-Year.</p>	Only visible when Date/DateTime field is chosen in Group By
	Fill Temporal Value	Allows you to show data in the detailed form	
	Sub Group By	Allows you to further group your Group By field data.	
	Sub Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, & Year.</p>	Only visible when Date/DateTime field is chosen in Sub Group By

	Sort By Field	It will allow you to select the field on which you want to sort the records/Data	
	Sort Order	Allows you to sort your data in Ascending or Descending order	
	Record Limit	Allows you to set limits to your records/data	Appear when the 'Record Limit Data Visibility' option is selected
	Domain	Allows you to add conditions to filter out your Data	This Odoo default widget is only available in Odoo 11, 12, 13, 14, & 15 versions. Odoo 10 customers will need technical knowledge to add conditions.
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed

	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	<div>Include Period</div> <div>Same Period Previous Years</div>	<div>It helps you to show the previous date data than the current one</div> <div>It allows you to track the data of the current month but in the previous year</div>	Only visible when the 'Date Filter Selection' is other than None.

2. Display

Display	Chart Color Palette	It will allow you to select the color from 4 pre-defined options i.e Default, Cool, Warm, and Neon	
	Show Data Value	Read the graph easily by selecting the 'Show Data Value'	
	Show Custom Unit	Display the custom unit in the Bar Chart	Only appear when 'Show Custom Unit' is selected
	Select Unit Type	Choose Unit type as Monetary or Custom	Only appear when 'Show Custom Unit' is selected

3. Actions

Actions	Action lines	Allow you to choose different data at a time to perform an action, to go in deep you can choose the	This field is applicable on every type except Tile, KPI, and List
----------------	---------------------	---	---

		number of lines as per your need	
	Client Action	Allows you to set the client action on the item, chosen by the client	Only visible when client action is selected
	Client Item Action	Allows you to set the action of the item	Only visible when client action is selected
	Item Action	Allows you to set the action of the item	Item Action

4. Auto Update

Auto Update	Auto Update Type	Allows you to choose the 'Show Live Update Pop Up'	Update at every instance
		Allows you to choose 'Set Update Interval'	Update after the selected interval

	Show Live Update Pop Up	Allow you to see the notification pop of live updates of records	Update at every instance must be activated
	Set Update Interval	Allow you to select the interval to update the data.	Update it after 'Selected Interval' must be selected

5. Advance Configuration

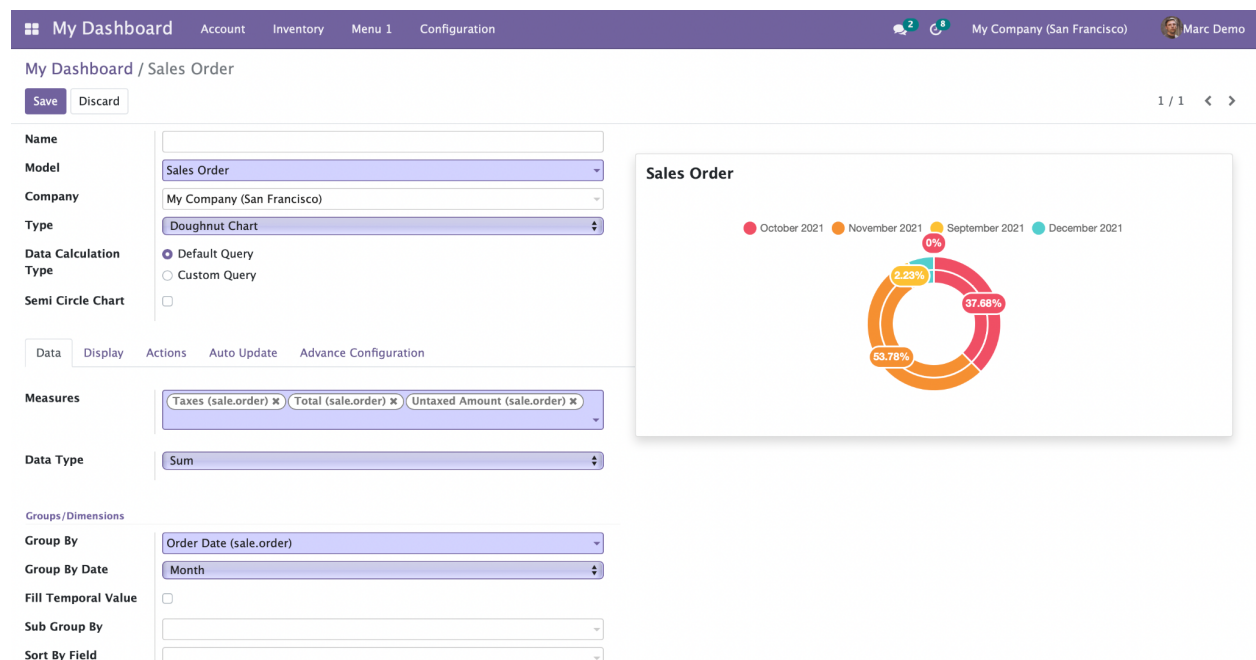
Advance Configuration	Show Legend	Show or hide a bar chart legend	Appears when 'Show Legend' is enabled
	Show Records	To display records of your data, select the 'Show Records' option	
	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier	Insert the number you wish your results to get	Visible when 'Apply Multiplier' action is

		multiplied by	selected
--	--	----------------------	-----------------

3.7 Doughnut Chart

Create A Dashboard Item As A Doughnut Chart

Create a Doughnut Chart following the steps as mentioned in the Bar Chart, & the final result will look like this:



If you need to create a Semi Doughnut Chart, check the ‘Semi Circle Chart’ option and save. The results will be displayed as given below:

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Doughnut Chart

Data Calculation Type

☒ Default Query
 ☐ Custom Query

Semi Circle Chart

☒

Data

Display

Actions

Auto Update

Advance Configuration

Measures

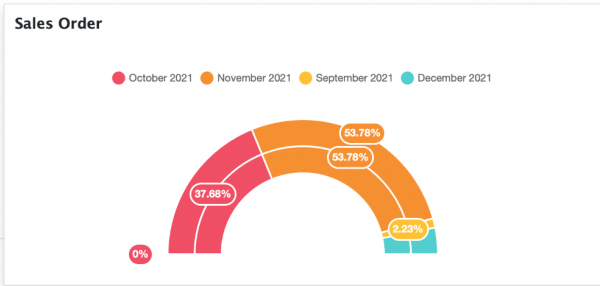
Taxes (sale.order) ✕

Total (sale.order) ✕

Untaxed Amount (sale.order) ✕

Data Type

Sum



Category	Label	Description	Condition
General	Name	Label which will be displayed on the header of the item	
	Model	Select the model/table on which you want to create your item	
	Company	Display Bar Chart to a particular company	
	Type	Select the type as Bar Chart	
	Data Calculation Type	Allows you to create ‘Default Query’ or ‘Custom Query’	<div>Two types</div> <div>Default Query</div> <div>Custom</div>

			Query
	Semi Circle Chart	Convert your Doughnut Chart into Semi Doughnut Chart	

1. Data

	Measures	Allows you to select the fields for which you want to perform the calculations as per the selected Model	Only visible when Data type is Sum or Average
	Data Type	Allows you to display your data as Sum, Count, or Average	
	Group By	Allows you to group your selected Measure fields data	

Data	Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, Year, & Month-Year.</p>	Only visible when Date/DateTime field is chosen in Group By
	Fill Temporal Value	Allows you to show data in the detailed form	
	Sub Group By	Allows you to further group your Group By field data.	
	Sub Group By Date	<p>Allows you to select the date option by which you wish to group the data.</p> <p>Options are Minute, Hour, Day, Week, Month, Quarter, & Year.</p>	Only visible when Date/DateTime field is chosen in Sub Group By

	Sort By Field	It will allow you to select the field on which you want to sort the records/Data	
	Sort Order	Allows you to sort your data in Ascending or Descending order	
	Record Limit	Allows you to set limits to your records/data	Appear when the 'Record Limit Data Visibility' option is selected
	Domain	Allows you to add conditions to filter out your Data	This Odoo default widget is only available in Odoo 11, 12, 13, 14, & 15 versions. Odoo 10 customers will need technical knowledge to add conditions.
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed

	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	<div>Include Period</div> <div>Same Period Previous Years</div>	<div>It helps you to show the previous date data than the current one</div> <div>It allows you to track the data of the current date but in the previous year</div>	Only visible when the 'Date Filter Selection' is other than None.

2. Display

Display	Chart Color Palette	It will allow you to select the color from 4 pre-defined options i.e Default, Cool, Warm, and Neon	
	Show Data Value	Read the graph easily by selecting the 'Show Data Value'	
	Show Custom Unit	Display the custom unit in the Bar Chart	Only appear when 'Show Custom Unit' is selected
	Select Unit Type	Choose Unit type as Monetary or Custom	Only appear when 'Show Custom Unit' is selected

3. Actions

Actions	Action lines	Allow you to choose different data at a time to perform an action, to go in deep you can	This field is applicable on every type except Tile, KPI, and List
----------------	---------------------	--	---

		choose the number of lines as per your need	
	Client Action	Allows you to set the client action on the item, chosen by the client	Only visible when client action is selected
	Client Item Action	Allows you to set the action of the item	Only visible when client action is selected
	Item Action	Allows you to set the action of the item	Item Action

4. Auto Update

Auto Update	Auto Update Type	Allows you to choose the 'Show Live Update Pop Up'	Update at every instance
		Allows you to choose 'Set Update Interval'	Update after the selected interval

	Show Live Update Pop Up	Allow you to see the notification pop of live updates of records	Update at every instance must be activated
	Set Update Interval	Allow you to select the interval to update the data.	Update it after 'Selected Interval' must be selected

5. Advance Configuration

Advance Configuration	Show Legend	Show or hide a bar chart legend	Appears when 'Show Legend' is enabled
	Show Records	To display records of your data, select the 'Show Records' option	
	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier	Insert the number you wish your results to get	Visible when 'Apply Multiplier' action is

		multiplied by	selected
--	--	----------------------	-----------------

3.8 Polar Area Chart

Create A Dashboard Item As A Polar Area Chart

If you select the Dashboard Item as a Polar Area Chart, followed by all the necessary steps, you will get results like this:

My Dashboard

Account

Inventory

Menu 1

Configuration

2

6

My Company (San Francisco)

Marc Demo

My Dashboard / Sales Order

Save

Discard

1 / 1 < >

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

Polar Area Chart

Data Calculation Type

☒ Default Query
 ☐ Custom Query

Data

Display

Actions

Auto Update

Advance Configuration

Chart Color Palette

Default

Show Data Value

☐

Show Custom Unit

☐

Sales Order

October 2021

November 2021

September 2021

December 2021

Category	Label	Description	Condition
	Name	Label which will be displayed on the header of the item	
	Model	Select the model/table on which you want	

General		to create your item	
	Company	Display Bar Chart to a particular company	
	Type	Select the type as Bar Chart	
	Data Calculation Type	Allows you to create 'Default Query' or 'Custom Query'	<div>Type</div> <div>Default Query</div>
	Preview	Live Preview of the Polar Area Chart	

1. Data

	Measures	Allows you to select the fields for which you want to perform the calculations as per the selected Model	Only visible when Data type is Sum or Average
	Data Type	Allows you to display your data as Sum, Count, or Average	

Data	Group By	Allows you to group your selected Measure fields data	
	Group By Date	Allows you to select the date option by which you wish to group the data. Options are Minute, Hour, Day, Week, Month, Quarter, Year, & Month-Year.	Only visible when Date/DateTime field is chosen in Group By
	Fill Temporal Value	Allows you to show data in the detailed form	
	Sub Group By	Allows you to further group your Group By field data.	
	Sub Group By Date	Allows you to select the date option by which you wish to group the data. Options are Minute, Hour, Day, Week,	Only visible when Date/DateTime field is chosen in Sub Group By

		Month, Quarter, & Year.	
	Sort By Field	It will allow you to select the field on which you want to sort the records/Data	
	Sort Order	Allows you to sort your data in Ascending or Descending order	
	Record Limit	Allows you to set limits to your records/data	Appear when the 'Record Limit Data Visibility' option is selected
	Domain	Allows you to add conditions to filter out your Data	This Odoo default widget is only available in Odoo 11, 12, 13, 14, & 15 versions. Odoo 10 customers will need technical knowledge to add conditions.

	Date Filter Field	Field on which date filter will work	Only date fields will be displayed
	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	<div> <div>Include Period</div> <div>Same Period Previous Years</div> </div>	<div> <div>It helps you to show the previous date data than the current one</div> <div>It allows you to track the data of the current date but in the previous year</div> </div>	Only visible when the 'Date Filter Selection' is other than None.

2. Display

Display	Chart Color Palette	It will allow you to select the color from 4 pre-defined options i.e Default, Cool, Warm, and Neon	
	Show Data Value	Read the graph easily by selecting the 'Show Data Value'	
	Show Custom Unit	Display the custom unit in the Bar Chart	Only appear when 'Show Custom Unit' is selected
	Select Unit Type	Choose Unit type as Monetary or Custom	Only appear when 'Show Custom Unit' is selected

3. Actions

Actions	Action lines	Allow you to choose different data at a time to perform an action, to go in deep you can choose the number of lines as per your need	This field is applicable on every type except Tile, KPI, and List
	Client Action	Allows you to set the client action on the item, chosen by the client	Only visible when client action is selected
	Client Item Action	Allows you to set the action of the item	Only visible when client action is selected
	Item Action	Allows you to set the action of the item	Item Action

4. Auto Update

	Auto Update Type	Allows you to choose the 'Show Live Update Pop Up'	Update at every instance
--	-------------------------	---	---------------------------------

Auto Update		Allows you to choose 'Set Update Interval'	Update after the selected interval
	Show Live Update Pop Up	Allow you to see the notification pop of live updates of records	Update at every instance must be activated
	Set Update Interval	Allow you to select the interval to update the data.	Update it after 'Selected Interval' must be selected

5. Advance Configuration

Advance Configuration	Show Legend	Show or hide a bar chart legend	Appears when 'Show Legend' is enabled
	Show Records	To display records of your data, select the 'Show Records' option	

	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier	Insert the number you wish your results to get multiplied by	Visible when ‘Apply Multiplier’ action is selected

3.9 List View

Create a Dashboard Item as a List View

Select the List View Type as an option for the Dashboard Item followed by all the required steps to get the results like this:

My Dashboard

Account

Inventory

Menu 1

Configuration

2

4

My Company (San Francisco)

Marc Demo

My Dashboard / Sales Order

Save Discard

1 / 1 < >

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

List View

Data Calculation Type

☒ Default Query
 ☐ Custom Query

Data

Display

Actions

Target

Auto Update

Advance Configuration

List View Type

Grouped

Fields to show in list

Taxes (sale.order) ✕

Untaxed Amount (sale.order) ✕

Total (sale.order) ✕

Sales Order

Order Date : Month	Taxes	Untaxed Amount	Total	
October 2021	0.00	14,023.00	14,023.00	
November 2021	0.00	20,016.50	20,016.50	
September 2021	0.00	831.00	831.00	
December 2021	0.00	2,350.00	2,350.00	

Category	Label	Description	Condition
-----------------	--------------	--------------------	------------------

General	Name	Label which will be displayed on the header of the item	
	Model	Select the model/table on which you want to create your item	
	Company	Display Bar Chart to a particular company	
	Type	Select the type as Bar Chart	
	Data Calculation Type	Allows you to create 'Default Query' or 'Custom Query'	<div>Two types</div> <div>Default Query</div> <div>Custom Query</div>
	Preview	Live Preview of the Bar Chart	

1. Data

Data	List View	Allows you to view data in the list format	Further, divide your data as: Grouped or Un-Grouped
	Fields to Show in List	Allows you to display your data based on the selected measures	
	Group By	Allows you to group your selected Measure fields data	
	Group By Date	Allows you to select the date option by which you wish to group the data. Options are Minute, Hour, Day, Week, Month, Quarter, Year, & Month-Year.	Only visible when Date/DateTime field is chosen in Group By
	Fill Temporal Value	Allows you to show data in the detailed form	

	Sub Group By	Allows you to further group your Group By field data.	
	Sub Group By Date	Allows you to select the date option by which you wish to group the data. Options are Minute, Hour, Day, Week, Month, Quarter, & Year.	Only visible when Date/DateTime field is chosen in Sub Group By
	Sort By Field	It will allow you to select the field on which you want to sort the records/Data	
	Sort Order	Allows you to sort your data in Ascending or Descending order	
	Record Limit	Allows you to set limits to your records/data	Appear when the ‘Record Limit Data Visibility’ option is selected

	Domain	Allows you to add conditions to filter out your Data	<p>This Odoo default widget is only available in Odoo 11, 12 versions.</p> <p>Odoo 10 customers will need technical knowledge to add conditions.</p>
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed
	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter

	<div> <div>Include Period</div> <div>Same Period Previous Years</div> </div>	<div> <div>It helps you to show the previous date data than the current one</div> <div>It allows you to track the data of the current date but in the previous year</div> </div>	<p>Only visible when the 'Date Filter Selection' is other than None.</p>
--	--	--	---

2. Display

My Dashboard

Account

Inventory

Menu 1

Configuration

2

My Company (San Francisco)

Marc Demo

My Dashboard / Sales Order

Save

Discard

1 / 1 < >

Name

Model

Sales Order

Company

My Company (San Francisco)

Type

List View

Data Calculation Type

☒ Default Query
 ☐ Custom Query

Data

Display

Actions

Target

Auto Update

Advance Configuration

List View Layout

Layout 3

Sales Order

Order Date : Month	Taxes	Untaxed Amount	Total	
October 2021	0.00	14,023.00	14,023.00	
November 2021	0.00	20,016.50	20,016.50	
September 2021	0.00	831.00	831.00	
December 2021	0.00	2,350.00	2,350.00	

Display	List View Layout	<p>Change the appearance of your ListView with the given four options.</p> <p>Default layout, Layout1, 2, & 3</p>	
----------------	-------------------------	---	--

3. Actions

Actions	Action lines	Allow you to choose different data at a time to perform an action, to go in deep you can choose the number of lines as per your need	This field is applicable on every type except Tile, KPI, and List
----------------	---------------------	---	--

4. Target

Target	Enable Target	On enabling the option, you will be able to see the Target values	The target tab is only visible when the Date/Datetime field is selected in Group By
	Standard Target	Default target value if any value is empty for a particular date period	
	Date	Allows you to set the date on which you wish to see your Target values.	Visible only when you check the Enable Target option

	Value	Allows you to set the Target value respective to the date.	Visible only when you check the Enable Target option
--	--------------	---	---

5. Auto Update

Auto Update	Auto Update Type	Allows you to choose the ‘Show Live Update Pop Up’	Update at every instance
		Allows you to choose ‘Set Update Interval’	Update after the selected interval
	Show Live Update Pop Up	Allow you to see the notification pop of live updates of records	Update at every instance must be activated
	Set Update Interval	Allow you to select the interval to update the data.	Update it after ‘Selected Interval’ must be selected

--	--	--	--

6. Advance Configuration

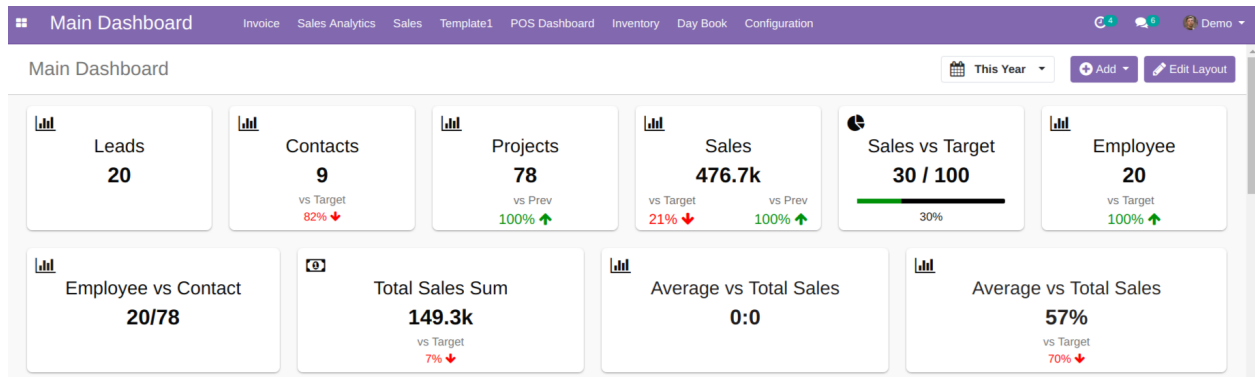
Advance Configuration	Pagination Limit	A user can set the limit of pages in the 'List View' as required.	
	Show Records	To display records of your data, select the 'Show Records' option	
	Apply Multiplier	Allows you to get results by applying a multiplying factor	
	Multiplier	Insert the number you wish your results to get multiplied by	Visible when 'Apply Multiplier' action is selected

3.10 KPI

Create a Dashboard Item as a KPI

You can create some amazing KPI with the below comparison options:

- KPI with Target
- KPI with Previous Period
- KPI with Target and Previous Period



1. Data & Data #2

After filling in all the necessary steps, the KPI tile looks like this:

The screenshot shows a 'My Dashboard' configuration page for a 'Sales Order' KPI. The form includes the following sections:

- Basic Info:** Name (Sales), Model (Sales Order), Company (My Company (San Francisco)), Type (KPI).
- Summary:** A small KPI tile showing 'Sales 26'.
- Data Configuration:**
 - Data #2:** Display, Actions, Target, Auto Update, Advance Configuration.
 - Record Type:** Count
 - Record Value:** 26.00
 - Compare With Previous Period:** ☐
- Filter:**
 - Domain:** Match all records (26 record(s), Edit Domain)
 - Date Filter Field:** Creation Date (sale.order)
 - Date Filter Selection:** None

You also get an option of the additional query using which you can perform different operations using the "Data Calculation" field on two result sets along with Target comparison:

- None/Comparison

- Sum
- Ratio
- Percentage

Name

Sales

Model

Sales Order

Company

My Company (San Francisco)

Type

KPI

Bar Chart

Sales

71

Data

Data #2

Display

Actions

Target

Auto Update

Advance Configuration

Model

Contact

Record Type

Count

Record Value

45.00

Data Calculation

☐ None
☒ Sum
☐ Ratio
☐ Percentage

Filter

Domain

Match all records

45 record(s)

Edit Domain

Date Filter Field

Creation Date (sale.order)

Date Filter Selection

None

Category	Label	Description	Condition
General	Name	Label which will be displayed on the tile	
	Model	Select the model/table on which you want to create your item	
	Company	Display KPI to a particular company	
	Type	Select the type as KPI	

	Preview	Live Preview of the KPI	
Data	Record Type	Allows you to show your data/record as a Count, Sum, or Average	
	Record Field	Allow you to select the field on which to apply the sum or average operation	It will only be visible when the Record Type is Sum or Average
	Record Value	Display exact value depending upon selected Record Type and Record Field	
	Previous Period	Show/Hide previous period value	
	Domain	Allow you to add conditions to filter out your Data	<p>This Odoo default widget is only available in Odoo 11, 12, 13, 14, & 15 versions.</p> <p>Odoo 10 customers will need technical knowledge to add conditions.</p>
	Date Filter Field	Field on which date filter will	Only date fields will be displayed

		work	
	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
Data #2	Model	Select the model/table on which you want to create your item	
	Record Type	Allows you to show your data/record as a Count, Sum, or Average	
	Record Field	Allow you to select the field on which to apply the sum or average operation	It will only be visible when the Record Type is Sum or Average

	Data Calculation	4 options for the calculation of Data and Data #2 result set. Options are None, Sum, Ratio, Percentage.	Target value displays only when Sum and Percentage is selected
	Domain	Allow you to add conditions to filter out your Data	This Odoo default widget is only available in Odoo 11, 12,13, 14, &15 versions. Odoo 10 customers will need technical knowledge to add conditions.
	Date Filter Field	Field on which date filter will work	Only date fields will be displayed
	Date Filter Selection	Select the Date filter for which you want to filter out your item records/data	If the None option is selected then only the Main Dashboard page date filter will work.
	Start Date	Option to set a start date for the custom date filter	Only visible when Date filter selection is set to Custom Filter
	End Date	Option to set an end date for the custom date filter	Only visible when Date filter selection is set to Custom Filter

2. Display

Convert your KPI tile into different colors to stand your chart among others.

My Dashboard

Account

Inventory

Menu 1

Configuration

2

8

My Company (San Francisco)

Marc Demo

My Dashboard / Sales Order

Save

Discard

1 / 1 < >

Name

Sales

Model

Sales Order

Company

My Company (San Francisco)

Type

KPI

Sales

71

Data

Data #2

Display

Actions

Target

Auto Update

Advance Configuration

Number System

English Format

Theme

Background Color

Transparency :

Font Color

Transparency :

Icon Option

Default Icons

Upload Icon

Icon

Icon Color

Transparency :

Top Button Color

Transparency :

	Number System	Track the data in your format with the pre-defined four Number system options	
	Layout	Choose the Layout for your dashboard item from the 6 available sets: Layout 1, 2, 3, 4, 5, & 6	

Display	Theme	A pre-configured set of 5 different colors i.e White, Blue, Green, Red, and Yellow. Select the Theme as per your choice	Get overridden if custom values are set in Background Color, Font Color & Icon Color
	Background Color	Allows you to set the background color from a color pop-up window. Also provides an option to set transparency.	
	Font Color	Allows you to set the font color from a color pop-up window. Also provides an option to set transparency.	
	Icon Option	Allows you to choose the icon from a pop-up	Default Icons

		<div> <div> window. </div> <div> Allows you to upload your custom icon. </div> </div>	<div> <div> Upload Icon </div> </div>
	Icon	We have provided 29 pre-loaded Default Font Awesome 4.7.0 icons	Use the search bar to search for other available Font Awesome icons.
	Icon Color	Allows you to choose the color of the icon. Also, provides an option to set transparency.	Only visible when Icon Option is chosen as Default
	Top Button Colorful	<p>Allows you to set the distinct color of Top Buttons of the Tile.</p> <p>Helps you to edit, remove, move, or duplicate from the Main Dashboard</p>	

3. Target

Under the Target Tab, you will get the option to see target value as Number or Progress Bar like described in below screenshot:

As Number:

The screenshot shows the 'My Dashboard / Sales Order' configuration page. The 'Target' tab is selected. The 'View' option is set to 'Number'. The 'Standard Target' is 70.00. The 'Sales' KPI is displayed as 71, which is 1% above the target.

Name	Model	Company	Type
Sales	Sales Order	My Company (San Francisco)	KPI

Enable Target: ☒

Standard Target: 70.00

View: ☒ Number ☐ Progress Bar

Sales: 71 vs Target 1% ↑

As Progress Bar:

The screenshot shows the 'My Dashboard / Sales Order' configuration page. The 'Target' tab is selected. The 'View' option is set to 'Progress Bar'. The 'Standard Target' is 70.00. The 'Sales' KPI is displayed as 71 / 70, which is 101% of the target.

Name	Model	Company	Type
Sales	Sales Order	My Company (San Francisco)	KPI

Enable Target: ☒

Standard Target: 70.00

View: ☐ Number ☒ Progress Bar

Sales: 71 / 70 101%

Target	Enable Target	Show/Hide target value	
--------	---------------	------------------------	--

	Standard Target	Target value to be compared	
	View	Allows you to display target value either in number or in Progress Bar	

- To-Do Item
- Additional Features
- Configurations

[Remains same as in old user guide. No extra changes are required Take sections 4 & 5 from the previous user guide

–<https://userguide.ksolves.com/dashboardninja/12/index.html#features>]