

Adding Charts to Dashlets

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Donor Management System

Want to learn more about this feature?

Watch our Training Webinars
here

Track your Summarized Report data straight from your main Dashboard by **adding a customized Chart as a Dashlet**.

By default, these Custom Dashlets will only be seen by the DMS User who generated them but any User can [configure it on their Dashboard](#).

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Considerations

Before you can add is as a Dashlet on our Dashboard, you'll first need to [generate a Bar Chart or Pie Chart](#) from within the **Reports Tab**.

Adding a Chart as a Dashlet

1. Once your Chart has been generated, give it a **Title** and **Description**.

Note: this title will be displayed on your Home Dashlet.

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Dashboard Contacts **Contributions** Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Contributions (Summary) - Template

Columns Sorting Filters **Title and Format** Access

Report Title: Monthly Contribution Summary 2019-2022

Report Description: Total amounts raised

Refresh results

Actions: Existing report(s) from this template

Pie Chart: Add Contacts to Group VIEW

Grouping(s): Date Received & Contribution Status

Date Received: Between Tuesday 1 January 2019, 12:00AM and Saturday 31 December 2022, 11:59PM

Contribution Status: Is Completed

Monthly Contribution Summary

Download chart (SVG) | Download chart (PNG)

Add a Title and Description to your report

2. Next, on the **Access** subtab, check off **Available for Dashboard?** to add the Report to your Dashboard. Then, under **Actions**, select **Save**

Monthly Contribution Summary 2019-2022

Columns Sorting Filters Title and Format **Access**

Add to My Reports? If set to Yes, this report will appear in the My Reports section of the reports listing page and will only be visible by you.
Available for Dashboard? Users with appropriate permissions can add this report to their dashboard.

Limit Dashboard Results rows

- Save**
- Save a Copy
- Print Report
- Export as CSV
- Delete report
- Actions**

Pie Chart
[+ Add Contacts to Group](#)

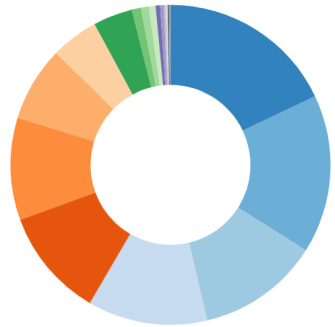
Grouping(s) Date Received & Contribution Status ?

Date Received Between Tuesday 1 January 2019, 12:00AM and Saturday 31 December 2022, 11:59PM

Delete report

Monthly Contribution Summary

- Oct of 2022
- Sep of 2022
- May of 2022
- Jun of 2022
- Nov of 2022
- Aug of 2022
- Jul of 2022
- Apr of 2022
- Dec of 2022
- Dec of 2021
- Jan of 2022
- Nov of 2021
- Mar of 2022
- Oct of 2021
- Feb of 2022
- Sep of 2021
- Mar of 2021
- Jun of 2021
- Apr of 2019
- Feb of 2021
- Jan of 2021



[Download chart \(SVG\)](#) | [Download chart \(PNG\)](#)

Make Available for Dashboard and Save

3. Now, if you visit your Dashboard, you will see your new Dashlet on the screen.

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Dashboard | Contacts | Contributions | Campaigns | Opportunities | Reports | DMS Mail

Settings | Help

DMSCA DMSCA

CanadaHelps DMS Home

2 Available Dashlets

Opportunities to Track

Prospect	Opportunity Type	Opportunity Amount	Application Deadline
Amadu A	Donation	\$5,000.00	December 1st, 2022
A. L. Kostenko	Gifts In Kind	\$250.00	
Accessibility Foundation	Grant	\$250,000.00	December 30th, 2022
Accessibility Foundation	Grant	\$50,000.00	
Accessibility Foundation	Pledge	\$10,000.00	
Alex Fergie	Grant	\$15,000.00	September 1st, 2022
Alex Fergie	Gifts In Kind	\$25,000.00	
Ada Anderson	Grant	\$5,000.00	September 12th, 2022
Bernadette Love	Grant	\$5,000.00	January 28th, 2022
Digital Angela	Other	\$2,500.00	

Last Year Inc. Today

Monthly Contribution Summary 2019-2022

Monthly Contribution Summary

Download chart (SVG) | Download chart (PNG)

New Email Replies

Contact Name	Contact Email	Activity Type	Subject	Date Received
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Previously-configured Dashlet

4. If needed, **drag and Drop** your new Dashlet where ever you'd like to position it on your Dashboard.

5. Once your Dashlet is in place, you can:

- **View Report:** will take you to the original Report in a New Tab
- **View Fullscreen:** will open a fullscreen view of the chart within your Home Tab
- **Refresh:** the Dashlet will refresh regularly, however, you can refresh it manually
- **Remove from Dashboard:** will place your Chart back under your **Available Dashlets**.

