

Widgets

14 renderable widget types. Grouped into pages by widget family.

- [What widget types are available in Vantage?](#)
- [How do I configure a KPI card widget?](#)
- [How do I configure a chart widget? \(Bar, Line, Donut, Pie, Combo, Stacked\)](#)

What widget types are available in Vantage?

Overview

Vantage dashboards are built from widgets — the individual charts, tables, maps, and text blocks you add to a dashboard. Vantage currently offers 14 widget types, grouped into a few families.

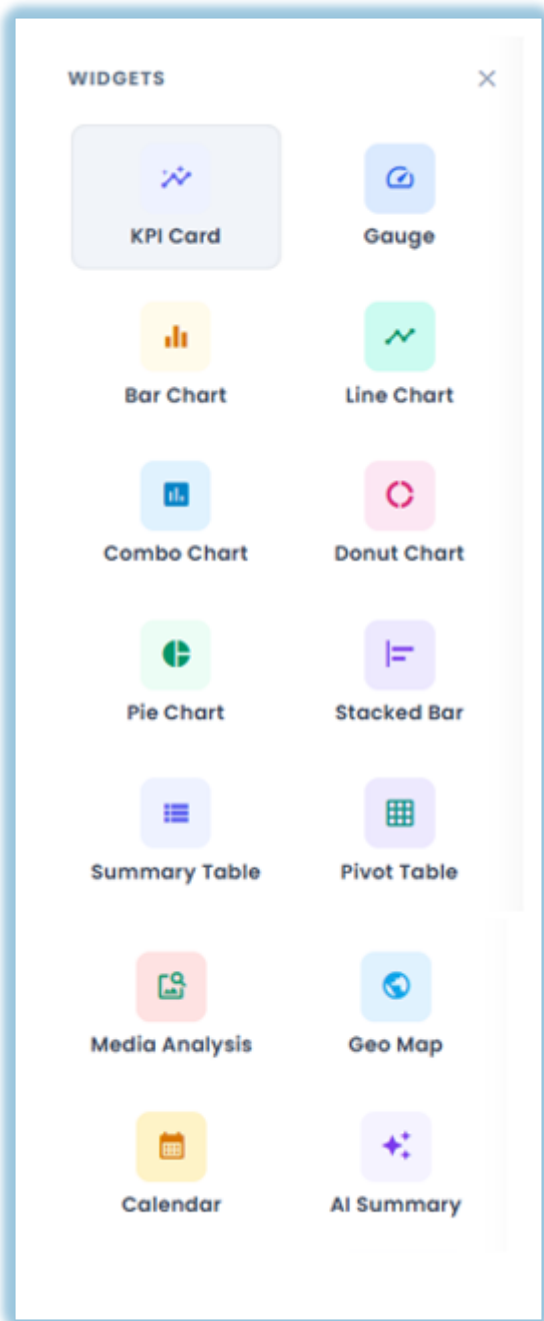
When to Use

Use this page when:

- You're deciding which widget fits the data you want to show
- You want to see every widget type at a glance before building a dashboard
- You're new to Vantage and want to know what's available

Concepts

1. **KPI Card** – A single large number, often with a trend arrow, for one metric you want to highlight at a glance — for example, total submissions or completion rate
2. **Chart** – Shows data as a bar, line, donut, pie, combo, or 100% stacked bar — good for trends over time or comparing categories
3. **Summary Table** – A plain table that groups and totals your data by the fields you choose, like a breakdown by region or product
4. **Pivot Table** – A table that cross-tabs two fields against each other, so you can compare two dimensions at once — for example, region vs. month
5. **Geo Map** – Plots your data on a map by location — useful for store-, region-, or country-level views
6. **Calendar** – Lays your data out across the days of a month — useful for spotting daily patterns or gaps
7. **Media Analysis** – Shows the results of AI checks run on submitted photos, such as a Yes/No check or an extracted value (two versions exist, v1 and v2)
8. **AI Summary** – A short, AI-written text summary of your data — a quick narrative instead of numbers or charts
9. **Title Block** – A text or heading block that labels a section of a dashboard — it doesn't show any data itself



Set Up Guide

Before You Start: Vantage is accessed inside Bsharp Converse through the Custom Widget on the Home Page — there's no separate Vantage app. If you haven't set this up yet, see [How do I use the Custom Widget?](#) first.

1. Go to a dashboard and click Add Widget
2. Vantage shows all 14 widget types in a grid — browse them here before deciding what to add
3. Each widget type has its own setup page later in this book, with the exact fields and options for that type

Best Practices

- Pick the widget type based on what you want to show, not how it looks — a KPI Card for one number, a table for a full breakdown, a chart for trends or comparisons
- Use Title Block to label sections if your dashboard combines widgets from different topics
- If you're not sure which chart type fits, start with a bar or line chart — they're the easiest to read

Related Links/FAQs

Related pages in this book:

- How do I configure a KPI card widget?
- How do I configure a chart widget?
- How do I configure a summary table or pivot table widget?
- How do I configure a geo map widget?
- How do I configure a calendar widget?
- How do I configure a media analysis widget?
- How do I configure an AI summary widget?

FAQs

How many widget types does Vantage have?

14, grouped into KPI cards, charts, tables, maps, calendar, media analysis, AI summary, and title blocks.

Can I change a widget's type after I've added it?

Yes — after you change the type, you'll need to configure it again to match the newly selected type.

What's a Title Block for?

It's a text block you can drop onto a dashboard to label a section — it doesn't show any data itself.

Version Notes

Last Updated: Oct 2026

How do I configure a KPI card widget?

Overview

Configuring a KPI card widget shows one key number on your dashboard, with an optional comparison to a previous period so you can see whether it's trending up or down.

When to Use

Use this feature when:

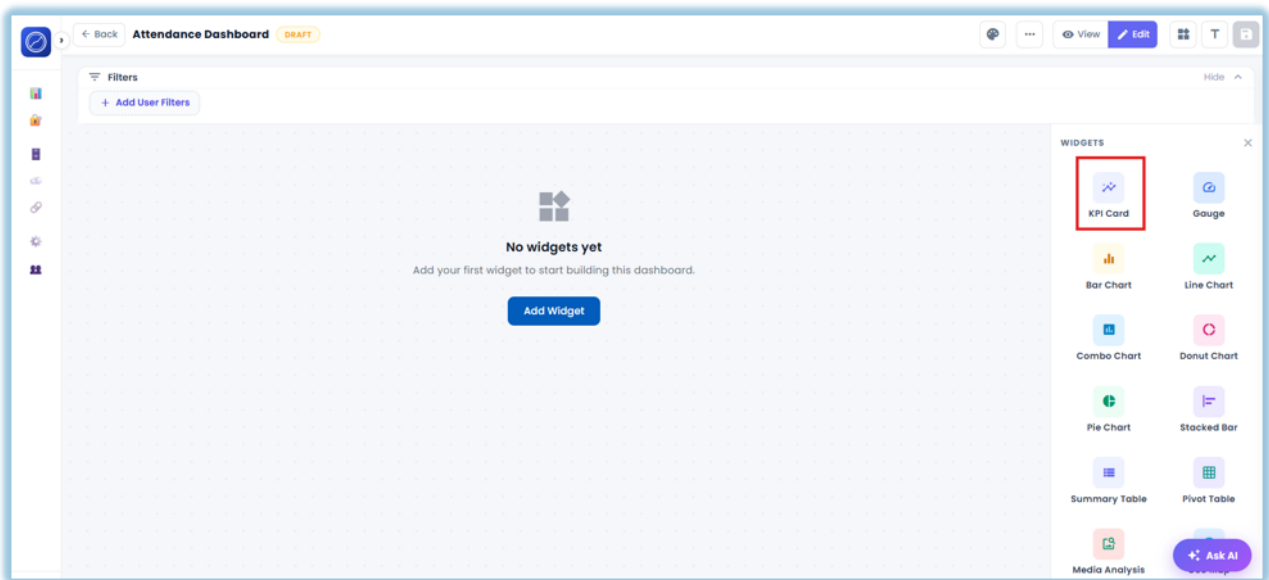
- You want to highlight a single key metric, like total submissions or completion rate
- You want to show whether a number has gone up or down compared to a previous period
- You need a custom calculation that a simple count, sum, or average can't do

Concepts

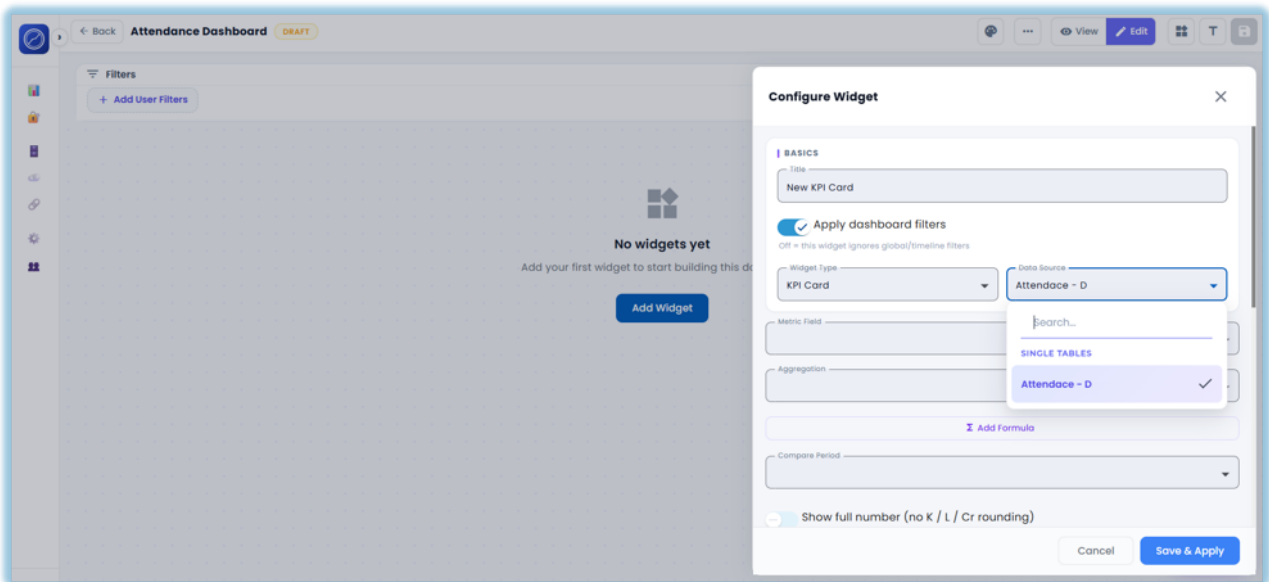
- KPI Card – A widget that shows one number, usually with a label and a trend arrow
- Source Field – The field whose values the KPI calculates — for example, submission count
- Aggregation – How a field's values are combined into one number, such as Sum, Count, or Average
- Compare Period – An optional second time period the KPI compares against, to show a trend
- Custom Formula – A manually written calculation, used when the built-in aggregations aren't enough

Set Up Guide

1. Go to a dashboard and click Add Widget
2. Select KPI Card



3. Choose the source — if the dashboard has only one source, it's selected automatically; if there are multiple sources or a relationship, choose which one to use



4. Build the KPI in one of two ways:
 - Select one field and choose the aggregation (Sum, Count, Average, etc.)

Configure Widget

BASICS

Title

Total Audits

☒ Apply dashboard filters

Off = this widget ignores global/timeline filters

Widget Type

KPI Card

Data Source

Retail Audit

Metric Field

Submission Id (text)

Aggregation

Count

Σ Add Formula

Compare Period

☐ Show full number (no K / L / Cr rounding)

Cancel

Save & Apply

- Or write a custom formula instead

Configure Widget

BASICS

Title

Total Audits

☒ Apply dashboard filters

Off = this widget ignores global/timeline filters

Widget Type

KPI Card

Data Source

Retail Audit

Metric Field

Submission Id (text)

Aggregation

Count

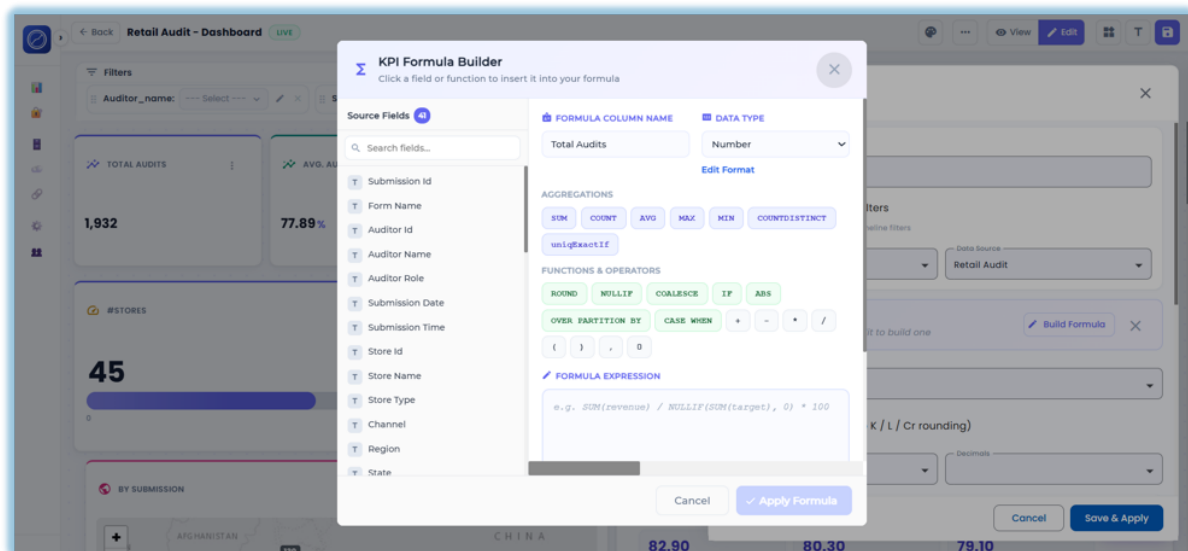
Σ Add Formula

Compare Period

☐ Show full number (no K / L / Cr rounding)

Cancel

Save & Apply



5. Turn on Compare Period if you want to show change vs. a previous period, and pick that period
6. Apply any filters you want the KPI to respect
7. Click Save

Best Practices

- Use Compare Period when the trend matters more than the raw number
- Only use Custom Formula when Sum, Count, or Average can't do what you need — it's harder to maintain
- Keep the KPI's label short so it's easy to read at a glance

Related Links/FAQs

Related pages in this book:

- What widget types are available in Vantage?
- How do I configure a chart widget?

FAQs

Can a KPI card use a custom formula?

Yes — if the built-in aggregations (Sum, Count, Average) don't cover what you need, you can write your own formula.

Does the KPI card show a trend automatically?

Only if you turn on Compare Period and pick a period to compare against.

Can I combine data from two sources in one KPI card?

Yes — but you need a Relationship defined between the sources first.

Version Notes

Last Updated: Oct 2026

How do I configure a chart widget? (Bar, Line, Donut, Pie, Combo, Stacked)