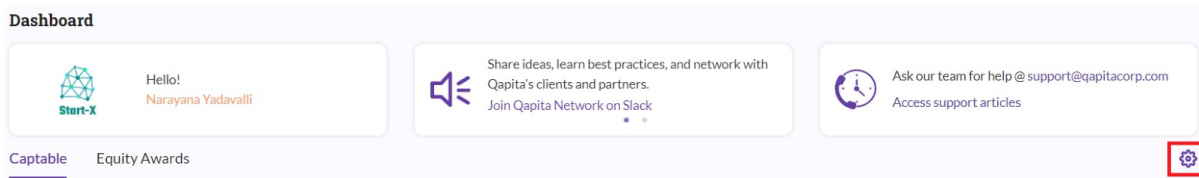


Introduction to Dashboard Customization

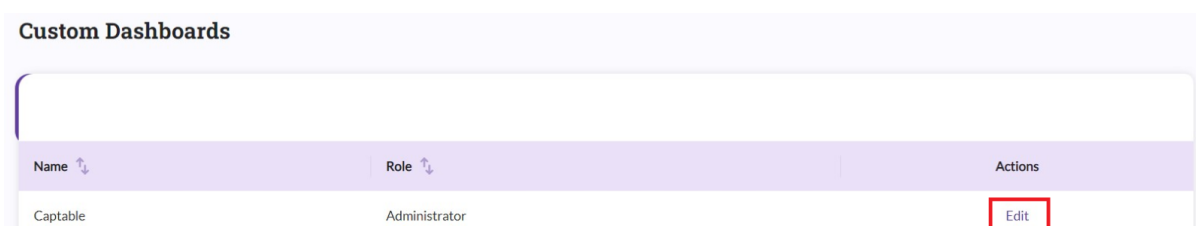
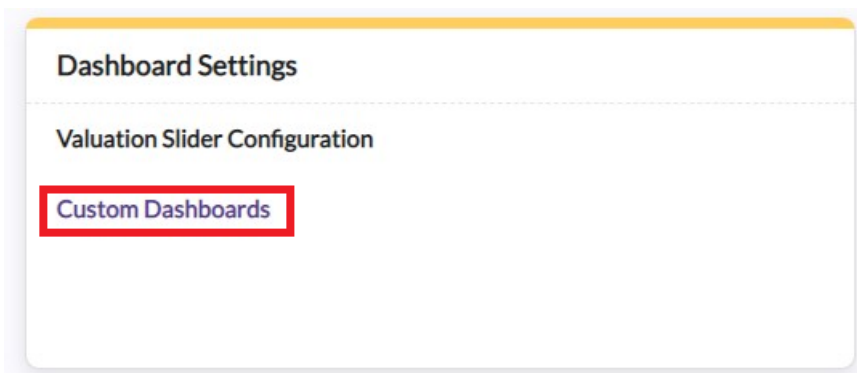
Modified on: Fri, 10 Feb, 2023 at 10:36 AM

In this article, we shall explore how to customize the Dashboard visible for admin users. You can navigate to the customization screen by clicking on either of the following options:

1. Dashboard Screen (Click on Settings Icon)



2. Settings Module (Settings -> Configurations -> Dashboard Settings "Custom Dashboard" -> Click on Edit option)



3. Upon clicking Edit, you will see the screen below.

← Configure Dashboard

Hello! Narayana Yadavalli

Complete our client satisfaction survey to share your feedback and suggestions
Tell us about your experience with Qapita

Ask our team for help @ support@qapita.com
Access support articles

Captable

Add Widget Save Dashboard

Overview of Funding Rounds

* Currency in SGD

Funding Rounds	Transaction Date	Price Per Share	Cash Raised	Post Money Valuation
Vicky Series	Jan 27, 2023	100.00	0.30 M	11,445.27 M
SERIES KUBER	Jan 18, 2023	1.00	0.00 M	114.45 M
Preferred Class	Jan 17, 2023	1.00	0.00 M	1,144.51 M
Stock Warrants V1	Jan 1, 2023	-	3.78 M	-
Vicky Note	Jan 1, 2023	-	0.13 M	-

Start-X Inc's Journey So Far

By Price By Valuation

* Currency in SGD

Quick Actions

+ Configure

Add Transactions Add Security Class View Captable Run Scenarios Reports

Captable Overview

INVESTORS 30

FULLY DILUTED SHARES 114,535,878

4. There are two ways in which you can Display or Hide a widget on the Dashboard.

- Click Delete Icon visible on the widget.
- Click Add Widget Icon visible on the screen.

- Delete:** You can also remove the widget from the dashboard, by clicking on Delete Icon (Available in every widget).
- Add Widget:** By clicking on this button, you can Include or Exclude a widget on the Dashboard.

← Configure Dashboard

Hello! Narayana Yadavalli

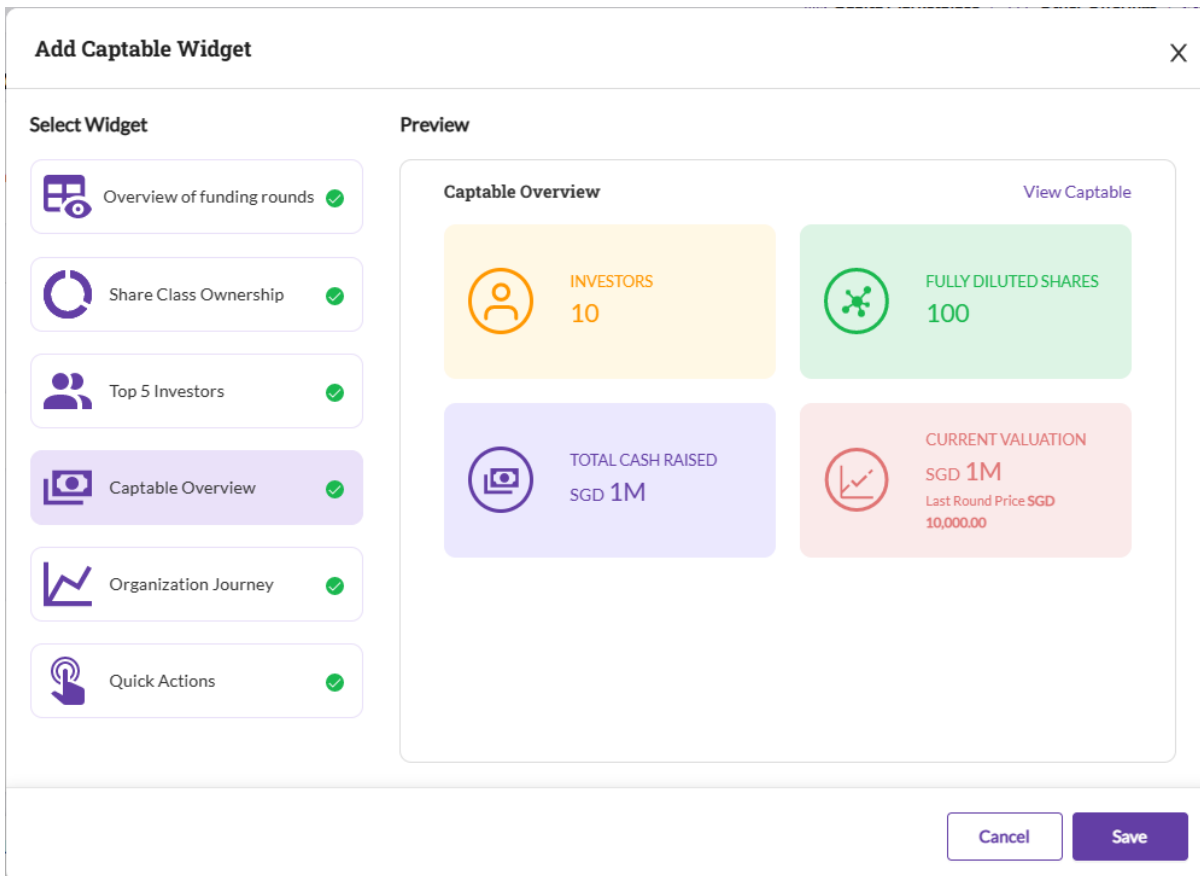
Complete our client satisfaction survey to share your feedback and suggestions
Tell us about your experience with Qapita

Ask our team for help @ support@qapita.com
Access support articles

Captable

Add Widget Save Dashboard

Action – Click on Add Widget button -> Select or Deselect widgets on the left (select widget list) -> Click on Save button to save the changes.



5. Adjusting widget dimension: You can increase or decrease the widget dimension, by hovering on Arrows Icon (highlighted in the screenshot).



6. Edit: The Edit Functionality is available only for Overview of Funding Rounds widget. This will help you in configuring the Transaction Date of Funding Round Date and Price Per Share values that you want to see on the widget. With Edit option you can perform the following action:

- Select a specific Transaction Date from the drop down (Available only when multiple transactions are recorded for same funding round with different dates).
- Select a specific Price Per Share from the drop down (Available only when multiple transactions are recorded for same funding round with different prices). Hide or Unhide a specific funding round (using toggle)

Overview of funding rounds					
Funding Rounds	Transaction Date	Price Per Share	Cash Raised	Post Money Valuation	Include
Ordinary	Dec 11, 2001	SGD 36.62632	SGD 2,955,960.39	SGD 3,015,340.00	<input checked="" type="checkbox"/>
Seed	Dec 11, 2001	SGD 20.00	SGD 200,000.00	USD 10,000.00	<input type="checkbox"/>
Series C	Jan 10, 2023	SGD 6.65115	SGD 205,500.00	SGD 57,080.00	<input checked="" type="checkbox"/>
Pre Series D	Jan 12, 2023	SGD 15.00	SGD 67,695.00	SGD 67,695.00	<input type="checkbox"/>
Test Share Class K	Jan 28, 2023	SGD 145.8538	SGD 100,000.00	SGD 100,000.00	<input checked="" type="checkbox"/>
Series D	Jan 31, 2023	SGD 10.00	SGD 20,000.00	SGD 20,000.00	<input checked="" type="checkbox"/>
	Feb 3, 2023				
	Feb 6, 2023				
	Apr 29, 2022				
	Mar 1, 2022				
					Update

Note: To save and view the changes, please click on the Update button. To Discard the changes, click on close icon "X" on the top right of the popup screen.

7. **" + Configure "**: This functionality is available only for Quick Actions widget. Upon clicking on it, the application displays all the available actions. You can display or hide any of these actions by simply clicking on the star icon.

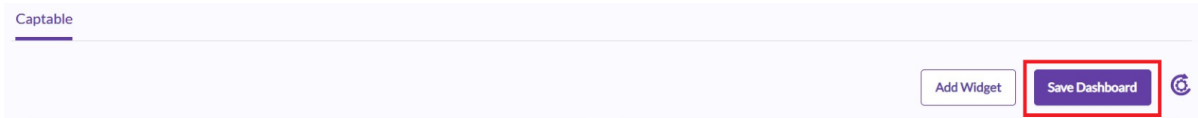


8. **Restore Dashboard:** Click on the icon shown below in case you are unhappy with the changes you made.

Note: You restore the previous view of dashboard before you save the final changes (I.e., before clicking on Save Dashboard button).



9. **Save Dashboard:** Once the required changes are made, click on Save Dashboard button to update the latest changes made to Dashboard view.



Upon successful completion of saving the dashboard changes application will display the following popup:

- Clicking on “Edit Dashboard Settings,” you will stay on dashboard configuration screen.
- Clicking on “Go to Dashboard,” you will be redirected to Dashboard screen.

