How to Make AI-Powered Interactive Dashboard | Bricks Tutorial

https://www.youtube.com/watch?v=1vz6EkUhbOg

Hi everyone, Kevin here. Today, we're going to build an interactive dashboard that you can use to present and communicate the most important information to your organization. First, we'll use an AI powered spreadsheet to clean and prep your data. You simply tell the AI how to transform your data and it'll take care of it. Then we'll use AI to make visuals.

Here too, you simply say what you want and that's what you get. And finally, we'll build a dashboard that you can share with others or you could even publish it to the web. We'll use a free service called Bricks to do all of this. Let's dive in.

To get started, head to the following website. You can click on the link right up above and I've also included a link down below in the description. Once you land on this page, click on the button that says create a dashboard. Once you finish signing in, you'll land here in the main Bricks interface.

And please ignore all of my personal files here. Today, we want to make a dashboard, so to do that in the top right-hand corner, let's click on this button that says create new and we have a few different options. We want to create a file. So, let's click on this first one. This now drops us into a new file and think of a file as a place where you might work on a project with teammates or maybe you want to complete some tasks.

And right here in the center of the screen, you'll see some examples of how you might want to use a file. Today, we want to make a dashboard. So over on the left-hand side, we can see the current file name for this dashboard and it's called Private 1, which isn't the most descriptive. So here I'll highlight that and type in a new name, the Kevin Cookie Company dashboard. I'm going to use this to inform management on how the business is performing.

Under that, we have three different views. You have a chat, this is where you can interact with the AI, or you could also talk to your teammates if you're working with some teammates. Down below, you also have a grid view and this is an AI powered spreadsheet. And underneath that, you also have a board view, and this is where you can present and communicate information. If you would like to add additional views to one of your files, down below, you can click on Add New and here you could add another grid, a board, or another chat. I'd like to start by bringing in some of our sales data here at the Kevin Cookie Company and then I need to clean that data.

So over here, I'll click into the grid. This now drops us into the grid view and it appears to be just a standard spreadsheet over on the right-hand side. But don't let looks deceive you. Down below, you also have this text field where you can take advantage of some incredible AI powers.

But first, I need to get some data into the spreadsheet. If you'd like to follow along, you can access all of the same data. I've included a link in the description. I'll click into cell A1 and here, I'll paste all of my data in. This is sales data for the Kevin Cookie Company. It's internal only, but you're welcome to use it for this tutorial as long as you don't share it with others.

Now that I've pasted all of this data in, I'd also like to make sure that all of the columns fit. So, I'll click right up here in the corner and that selects all of the columns and all of the rows. And here, I'll double click in between these columns to make sure all of the data fits. Now we could see it a little bit better.

All good dashboards start with data and that's why we started in the grid view, and you'll notice that this data that I have here is formatted fairly well. It's in a tabular format. Right up on top, I have headers and I have all the corresponding data down below. But the data is by no means pristine. Here, for example, in column A, I have the country and the product in one column. Ideally, these would both be in their own separate column.

If we look over here, I'm missing a column for the profit and I need to calculate that. So, before we can start analyzing this data, we need to make some transformations or some adjustments to the way this data is presented, and we'll do that in a moment, and we'll use AI. But before we can do that, we need to format all of this data as a table. That helps structure the data and it also makes it easier for the AI to analyze. So, let's click into cell A1, and then up on top, let's click on this icon that says Bricks, and within this menu, there's the option to turn it into a table. I'll click on that and here you see that the data is now contained within a table.

We're making good progress. Let's now start cleaning the data. Here in column A, I conflate the country and the product and I want them to be in separate columns. Now, of course, I could right click up here and I could insert another column and then I could enter a formula or function to try to separate these.

But that sounds somewhat difficult. So instead, let's see if we could use AI to do this. Down at the very bottom, we have this text field and this is where we can interact or prompt the AI. Here, I'll type in my prompt. I'll simply say make new columns with the country and the product, and let's send that through.

And look at that, that is cool. Right up here, it tells me what exactly it did, so it said that it split the country and the product into two separate columns. And if we look right up above, here I have the country and I also have the product as their own separate column. That was really easy. Down below, if for whatever reason, it doesn't do what I intended for it to do, I could click on reject, but this looks good, so I'll click on close. Now we don't need column A anymore.

So right here, I'll select this column, right click, and over here, we can now delete this column. I also want to add a column with the profit and that's the revenue minus the cost. And again, I could insert a column and I could enter in the formula to be able to calculate that, but let's see if the AI could just do that. Down below in this text field, I'll type in add a column with the profit and let's send that through.

And look at that, there's the profit, perfect. Now this is currency, so I also want to format it as a currency. So, let's see if AI could do that for me. Here, I'll say format revenue costs and profit as currency and let's send that through.

Nice, and look at that, there's my profit, where you make a lot of money here at the cookie company. Like I've always said, the cookie business is a very good one. One thing I'd like to do is I also want to highlight any of our larger profit orders. That way they really stand out to management. So down below in this text field, I'll type in highlight profit over 5,000 in green.

So, this is basically conditional formatting, but instead of me trying to figure out how to get it to work and how to enter all the different conditions in, here I simply type in a line of text and let's send that through. And look at that, it's now highlighted all the orders where the profit exceeded 5,000. Again, so easy, all I have to do is type what I want. The data is all now in very good shape. It's all been cleaned and it's been prepped, and next, I want to pull together some visuals. Sometimes visuals just do a much better job at telling the story behind the data.

And here too, we can also use AI to help us pull together some visuals. So right down below, I'd like to see some type of visual that shows me the profit by the country and also the product, and I'm thinking maybe a bar chart or maybe a stacked bar chart. So down in the text field, I'll type in the prompt, make a stacked bar chart that shows profit by country and product. And right over here, let's see what the AI can make.

And right up above, the AI has created a stacked bar chart. Right over here, I can see profit by country. So, if I look at this, it appears that India drives the most profit for us here at the Kevin Cookie Company, followed by the UK and then the United States. And here within each bar, I can see which cookie contributes the most to that profit. Here, when I hover over India, we can see that chocolate chip is the biggest driver of profit.

And it looks like chocolate chip drives most of the profit in all of the different markets. That's really neat. Along with using AI to create a chart, you can also simply manually create a chart. Over here, I'll click into the data, and up on top, let's click on the Bricks icon, and here's the option to make a chart. Let's click on this.

Down below, it asks me for the data range. And here, it's selected all the data over on the left-hand side. Right up here, I'll click on Create. This now opens up a view where I can start building my visual or my chart. Right up on top, I see the different chart types.

And I want to show profit over time, and a line chart works really well for that. So over here, I'll click on Line. And there are a few different types. I'll simply go with a basic line. Over on the left-hand side, I see all of my different fields.

And a field is basically your column header from the table. Here, you see my table with all of the data. And here, we see all the different column headers, and all of those align with the different fields shown up above. Let's now start building the chart.

And again, I want to look at profit over time. So, within this field list, here I have profit. And then I also have the date or time. So, let's start with the time. I'll press and hold on this and then drag it over.

And when I do that, I can release it in a few different places. Right up on top, I have the x-axis. And when I hover over this, down below, I also see this highlight. Now, this is a line chart, and I want the horizontal line or the x-axis to show the dates or the time. So, I'll release the date right here.

And if we look up above, here we placed the field in the x-axis for the date. Now, I want to see the profit, and that's a value. So right over here in the field list, I'll click on Profit. And I can drag that over. And I could release it up here under Value. Or I could place it right here.

I'll place it in Values. And as soon as I do that, we now see a chart or a line chart over time. This is great. But if we look down below, here we have over on the left-hand side and over on the right-hand side. So, the date is not currently sorted correctly. So down below, here I have all my different columns and my data.

Let's click on the Date column on this arrow dropdown. And right here, I see all my different dates. I want to sort it from the oldest on the left to the newest on the right. So over here, I'll click on this icon. And then I'll click on Apply.

And here you see that it's changed the sort order. So now we have December over on the right, and here we have August all the way over on the left-hand side. This line chart is currently showing the total profit, but you can also adjust this view. Up on top under Values, here I see the profit field, and when I click on this, currently it's set to sum.

Basically, showing me the aggregate by month. But over here, we could also look at the average or the median, the min, the max. So, lots of different ways to change the way you view your data. This line chart currently shows me two years' worth of data. Here we have and 2023. Management's mostly just interested in 2023.

So I want to filter the data to just look at one year. Down below, let's go back to the data at the bottom, and here I'll click on this dropdown on the date. And right over here, there's the option to add a condition or a filter. When I click on this, here we have a dropdown and currently it's set to none.

But I have all these different options for filtering my data. I'll select greater or equal. And next I could enter in a date, so let's enter in January 1st, 2023. And then I'll click on apply. And here we now just have 2023. I'm happy with the way this line chart looks now, so in the top right-hand corner, let's click on this button that says save to grid.

And that now inserts this line chart onto the grid. Currently it has no title or it's called untitled. So, let's click on that and let's give it a better name. Here I'll call it profit by month. Next, I'll select this and let's drag it down, and here, I'll simply place it underneath the other chart.

I think these both look good. You might be wondering when are we actually going to build a dashboard? And don't worry, we're going to do that in just a second. We've done all the hard work now.

We've cleaned our data and we've built some of our visuals. Next, over on the left-hand side, let's click into the board view. This drops us into the board view. And this is where we're going to construct our dashboard. This is where we can communicate and present all of that information that we pulled together in the grid.

First off, I think it would be good to have some type of header that describes what's on this board. So over on the right-hand side, let's insert a text element. I'll click on this and here we have a few different options, but I like this visual board in dark background. I'll click on that and that now inserts it onto the board.

Over here, I'll update this text. Let's now bring some of those visuals that we made into this dashboard. Over on the left-hand side, I'll click back into the grid, and here we see those beautiful visuals that we pulled together. First, I want to bring in the profit by country and product. Management really cares about that.

I'll select this one. And here we see the option to send copy to. I'll click on this and we could send it to a new board, but we actually already have a board. Right here, we see the name board.

I'll click on this and that now brings it over to this new sales dashboard that we're creating. I also want to pull in the other visual. So, let's go back to the grid and here we see the profit by month. I'll click on this and again, just like we did, let's click on send copy to.

And over here, we could send it to the board. And there it's now inserted the profit by month. I just realized I'd like to add one more visual to my dashboard. I also want to show units sold by month. Now, of course, I could go back to the grid view. I could build out the view there and then I could bring it over to the board.

But instead, and what's even easier, here I will go under profit by month. And when I hover my mouse, here I see this plus icon. And when I click on that, I could insert all sorts of different objects, but I want to insert one more chart. So, I'll click on chart and then over on the left-hand side, I can choose where the data for this chart is coming from. Here, I'll click on grid.

Next, I could also choose the data range. So over here, I'll click into my table and here it automatically identifies all of the data within this table. Let's click on create. Now we've done this before. So over on the left-hand side, here, I'll select units sold from the fields list and let's drag that into values. And next, let's select the date and drag that up to the X axis.

And here we have a view of orders over time. However, once again, we need to sort it. So, I'll click on the date and let's sort. And there we can now see units sold over time. But again, with something being shown over time, typically a line chart works better.

So, let's go up above, let's click on line and that changes the type of chart. This now looks good. So, let's save it to the board. Right down below, it's now inserted my new view, but let me give this chart a title. I'll click into here and let's type in units sold by month.

I now have all of the visuals included on the dashboard, but I'd like to organize it now. Right up on top, the profit by country and product is the most important view for management. So here I'll click on this one and let's expand it, so it takes up the full width of the dashboard. Down below, I could also adjust the vertical space that this visual takes.

I'll make it a little bit smaller, so it's easy to see that there's more content underneath. Next, we have the profit by month. And then I also have the units sold by month. But I want these two to be side by side because as you can see, the more units that we sell per month, we also see that affects the profit.

So over here, I'll take this visual and I can simply drag it around on the page. So here I could place it above, under, or simply side by side. I want it over on the right. So here I'll release and now it's side by side with the profit. It's really easy to organize all the different visuals on the dashboard to get it to look exactly how you need it to look.

Although we've moved these visuals to the board view, this is all live data. So, if I make any updates to the data, that'll flow through to the board. Here as an example, I could filter the data directly within this view. And here we now have it filtered just to chocolate chip cookies. I can now go back into the grid and say that actually this order from India for chocolate chip cookies was actually a lot more.

It was 500,000. Here, I'll update it to 500,000. Over on the right-hand side, you'll see how this chart automatically updated. And if we jump into the board view, here too, this chart has also updated to reflect the new number in the grid. I think this dashboard looks really good now and I'm ready to share it out with a broader organization. There are a few different ways that I can do that.

Let's say I just want to share it out, say, in a meeting or maybe on a conference call. Right up on top, I can click on present and this launches me into presentation mode. Here I see the header and I could go through page by page. Here we see the profit by country and product. And here I see that side-by-side view. I'll press the escape key to exit.

Right up on top, I can also share it out with others. Here I'll click on share and I can invite others to work with me on this dashboard. And I could also give them access to the grid so we can collaborate on this. Down below, I can also publish to the internet and that way anyone can view this but they won't be able to edit it. So, I have a few different options here and I can configure the permissions for how others can interact with this dashboard.

All right, there you go. Now you know how to make an interactive dashboard using an AI powered spreadsheet with Bricks. If you have any questions or feedback on Bricks, leave a comment down below. Thanks for watching and I'll see you in the next video.