

Alterview Charts User Guide



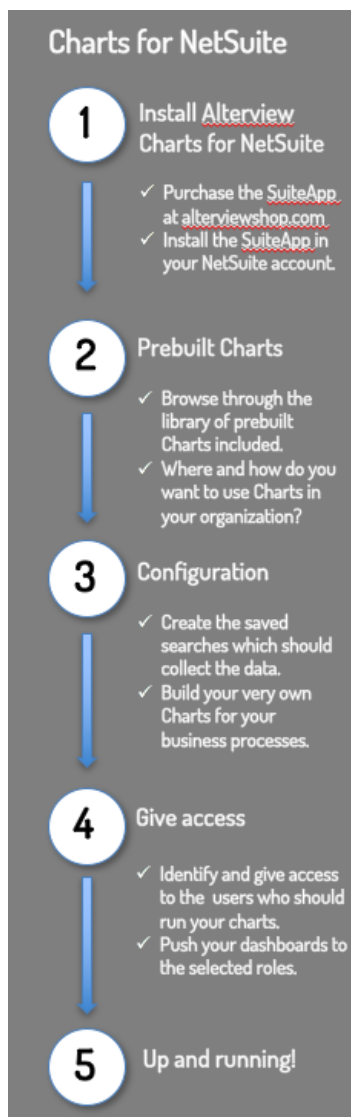
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ALTERVIEW CHARTS

Alterview Charts is a powerful tool to provide you with an instant graphical overview of your selected key performance indicators on your dashboard. Alterview Charts enables a more efficient way of working for you and your team, regardless business function. Use the pre-configured charts or configure your very own charts for your particular business figures, based on any standard or custom table in Netsuite.



The process of getting started with Alterview Charts consists of a few simple steps.

Purchase the SuiteApp and install the bundle in your NetSuite account.

Use some of the many pre-configured charts simply by displaying them in a custom portlet on your dashboard.

OR

Configure your very own charts by creating a saved search to collect accurate data, select type of chart/graph and define how to display your data in the chart/graph.

Finish the process by giving access to your charts for selected users and display them in a custom portlet on your dashboard.

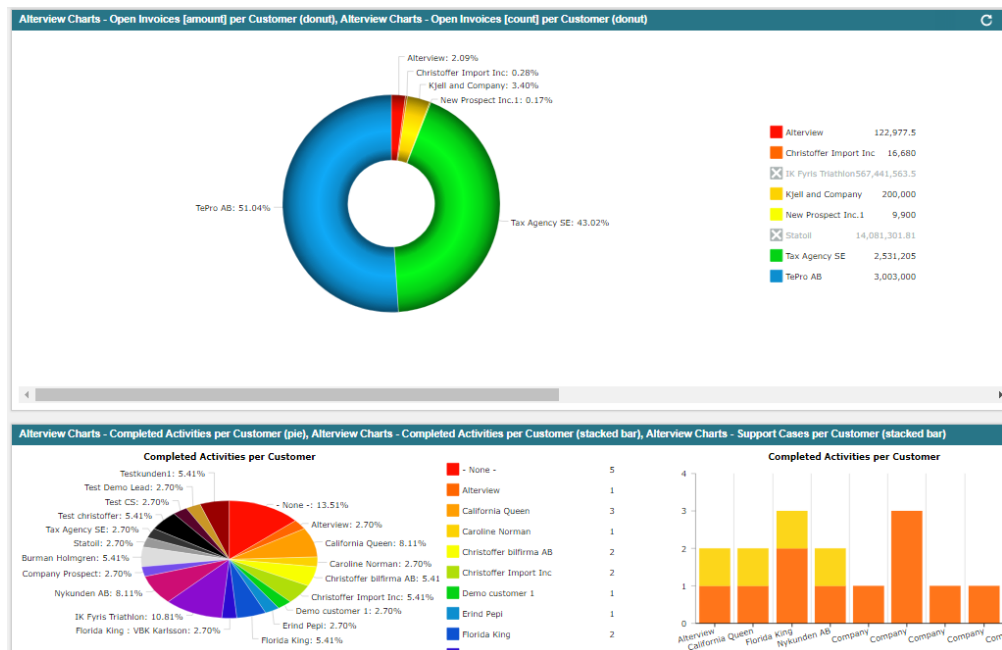
Important: please be aware that charts based on searches containing high volume of data may suddenly return a timeout as well as functions that generate excessive level of activity may trigger metering of script execution as referenced in the NetSuite Main Terms of Service

PREPARATIONS

Before starting with the configuration of the chart in your NetSuite account it is a good idea to design a draft of the layout on paper and decide what data to include. You should mainly consider:

- Which data will be presented in the chart (this determines what the search will be based on).
- Which type of chart/graph is best suited for the data you wish to present.

This User Guide provides general guidelines for configuring a new chart as well as a step-by-step configuration guide for each available chart type. The data presented in these examples are included in the bundle as prebuilt charts and can be used as inspiration and guidance when setting up your own charts, to display KPI-figures for your business needs.



USER ACCESS

The Alterview Charts Administrator role included with the bundle has a Test Area where all pre-configured Charts, as well as your customized charts, can be previewed before moved to production. In order to preview Charts in the test area an Alterview Charts User access is needed. Navigate to Administration → Alterview Chart Users to create a new Alterview Charts Users record for the user. Once this is done, the charts will be available to preview in the test area.

Alterview Charts Admin Users

☐ INACTIVE
 ☒ GIVE ACCESS

USER
 Caroline Norman

AVAILABLE TYPES OF CHARTS



There are currently fourteen types of charts to select from:

- [Bar Chart](#)
- [Data Grid](#)
- [Donut Chart](#)
- [Funnel Chart](#)
- [Gauge Chart](#)
- [Gauge Percentage Chart](#)
- [Stacked Bar Chart](#)
- [Line Chart](#)
- [Map with bubbles](#)
- [Map with Lines](#)
- [Multi Bar Chart](#)
- [Pie Chart](#)
- [Stacked Area Chart](#)
- [Layered Bar Chart](#)

Step-by-step instructions are provided for each chart type in this user guide (please click on a chart type name to jump straight to the instructions for that particular chart type).

Regardless of the type of chart selected, all charts uses saved searches to collect accurate data to display.

SAVED SEARCHES

Navigate to Administration → Alterview Chart Setup → Saved Searches → New
(using the role "Alterview Charts Administrator")

1. General information

Select the record which the search will be based on. Give the search a name and make sure to make it a public search.

Saved Case Search

aChart - Support Cases per Company and Status This Month

Save As Reset Preview Actions ▾

SEARCH TITLE *

aChart - Support Cases per Company and Status This Month

2. Criteria

Define any criteria to apply on the search in order to only include relevant posts (for example date limitations, type of transactions or a specific status).

3. Results

Select which data to include in the chart in the Results-tab. It is possible to include fields from the base record (the record you base your search on), from child records and formula fields. In most cases a Summary type is selected, to display aggregations of the selected data.

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Company	Group				Company			
Status								
Internal ID	Count						Total Number Of Cases	
Formula (Numeric)	Sum		case when (status.id) in (2) then 1 END		IN PROGRESS		In Progress	
Formula (Numeric)	Sum		case when (status.id) in (3) then 1 END		ESCALATED		Escalated	
Formula (Numeric)	Sum		case when (status.id) in (1) then 1 END		NOT STARTED		Not Started	
Formula (Numeric)	Sum		case when (status.id) in (4) then 1 END		RE-OPENED		Re-Opened	
Formula (Numeric)	Sum		case when (status.id) in (5) then 1 END		CLOSED		Closed	
Number								
Subject								
Issue								
Date Created								

4. Custom Labels

Define Custom Labels for the fields in the Results-tab in in order to display the data in the chart. Please note that a Summary label is needed for fields with a selected Summary type.

5. Save

Finish by saving the search, and again, make sure to make it public.

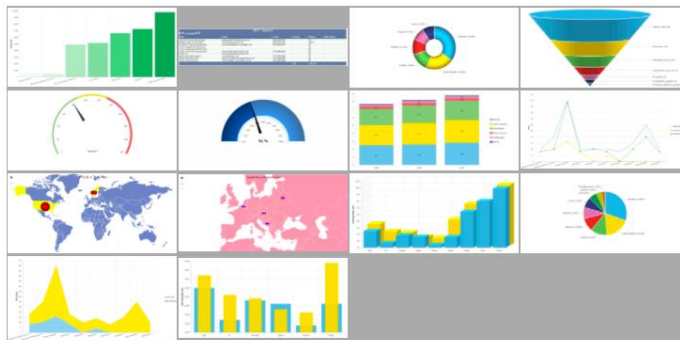
CONFIGURATION

Setting up a new chart is done in two steps – first a new Chart Configuration record is created (selecting type of chart etc.) and then a new Chart Search record is created (connecting the selected chart with the saved search).

1. Chart Configuration Record

Navigate to Administration → Alterview Chart Setup → Charts → New

Start by selecting type of chart/graph by clicking on one of the chart types images – this will display all fields valid for that particular chart type.



Give the chart a name, enter information regarding style/layout (optional) and save the record. (Please refer to *Chart Examples* for configuration details for each chart type)

Alterview Charts List Search More

Save **Cancel** **Reset** **Screenshot**

General

CUSTOM FORM
Alterview Donut Chart

NAME *

CHART DESCRIPTION

INACTIVE

VALIDATION RESULT

Title

TITLE

TITLE FONTSIZE

TITLE BOLD

TITLE ALIGN

Style

☐ ADD SUMMARY SLICE

☐ LABEL FOR SUMMARY SLICE

MAXIMUM NUMBER OF DATA

☐ DISPLAY LABELS

☐ DISPLAY LEGEND

LABEL MAX WIDTH

COLOR HUE *

Green

COLOR LUMINOSITY *

Bright

☐ 3D VIEW

Once the Chart Configuration record has been saved one or several Chart Search records should be created as sub-records to the Configuration, connecting the saved search/searches to the chart.

2. Chart Search Record

From the Chart Configuration record one or several Chart Search records should be created, to connect the saved search/searches to the chart. This is done by clicking on the button *New Alterview Charts Search*.

- In the Alterview Chart Search record, start by selecting which search to connect to the chart.
- In the fields *Value Field* and *Title Field*, enter the label (custom or summary label) from the saved search corresponding to the data you wish to display in the chart. Make sure to match the label from the saved search exactly (case sensitive).

Typically the *Value Field* will be displayed on the Y-axis and the *Title Field* will be displayed on the X-axis. (Please refer to the section [Chart Examples](#) for detailed setup instructions for each chart type).

Alterview Charts Search

Save

Cancel

Reset

Screenshot! (Not licensed)

SEARCH

VALUE FIELD

TITLE FIELD

ORDER

☐ REFERENCE SEARCH
☐ SHOW MAIN SEARCH
CUSTOMER FILTER EXPRESSION

3. Multiple searches in one chart

Alterview Charts enables you to connect several saved searches or the same search multiple times to one chart, making it possible to display data from multiple sources in you chart.

Typically the *Title Field* will display the data which the saved searches have in common.

ORDER	SEARCH #	VALUE FIELD	TITLE FIELD	IMAGE FIELD	REFERENCE SEARCH
	aChart - Support Cases per Company and Status This Month	Not Started	Company		
	aChart - Support Cases per Company and Status This Month	In Progress	Company		
	aChart - Support Cases per Company and Status This Month	Closed	Company		
	aChart - Support Cases per Company and Status This Month	Re-Opened	Company		
	aChart - Support Cases per Company and Status This Month	Escalated	Company		

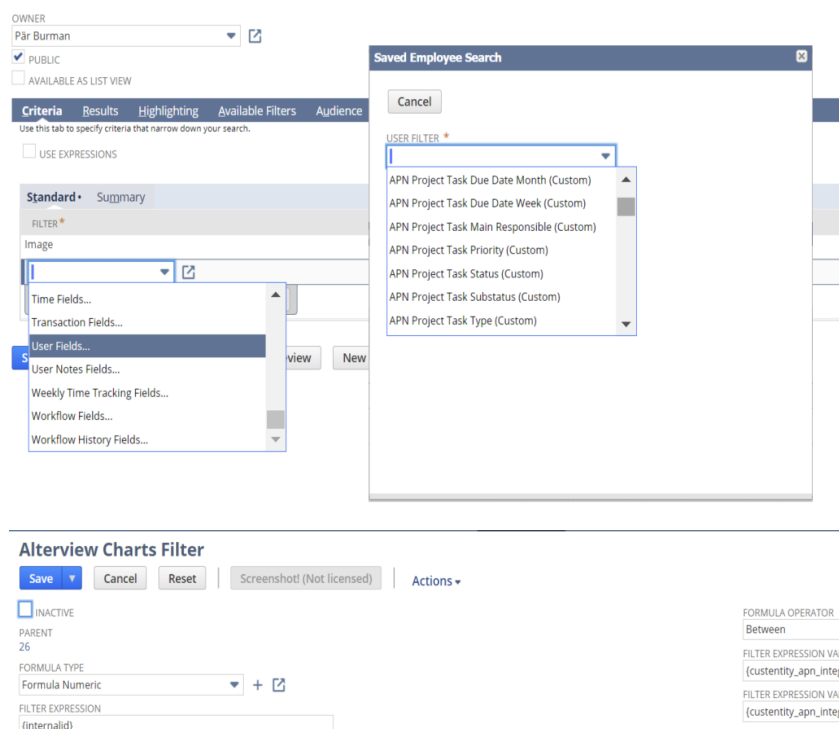
ADDITIONAL CONFIGURATION

When working with Alterview Charts there are a couple of common functions available which are optional to configure.

1. **Additional Filters** *(only valid when using Alterview Charts together with Alterview Navigator)*

The Additional Filters is a functionality used together with Alterview Navigator. The Alterview Navigator is a portlet where the user can define a group of entity fields, which can be used in almost all searches to narrow down the result for the current user. In many cases the company does not allow access to the record type "employee", this can be solved with the function Additional filters.

Additional filters will also solve the issue of saved searches time out, which can occur when creating searches for large tables or when adding a dynamic filter from the current user. Additional filters will retrieve the entity values from the current user and add that filter as a static filter, which is extremely fast.



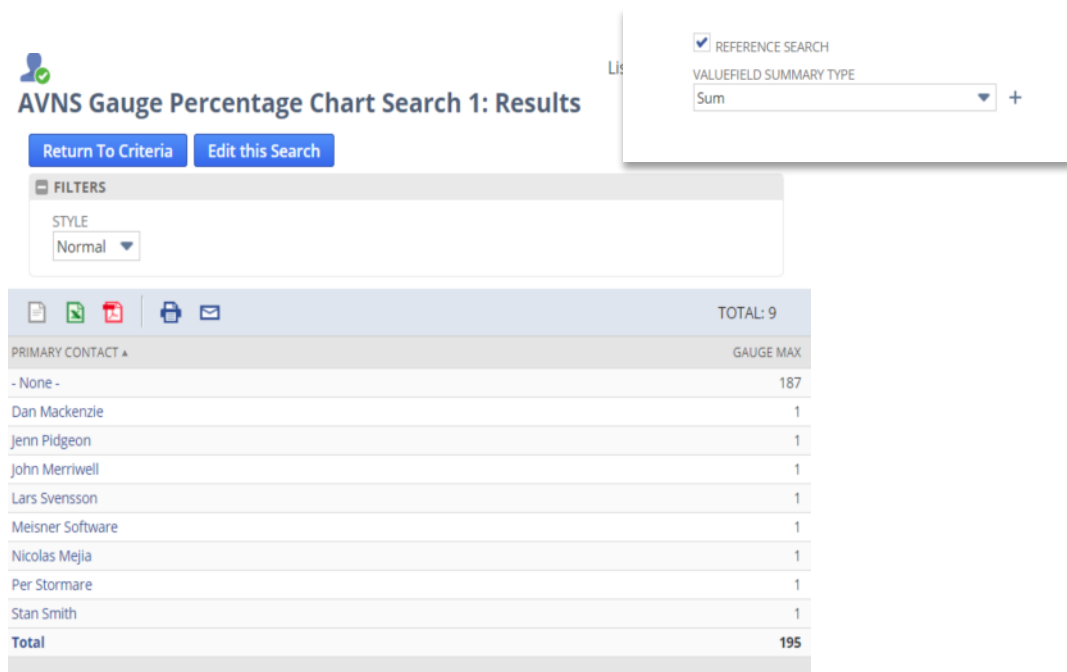
The image shows two screenshots of the Alterview interface. The top screenshot shows the 'Saved Employee Search' dialog box. It has a 'Cancel' button and a 'USER FILTER *' dropdown menu. The dropdown menu is open, showing a list of filters: 'APN Project Task Due Date Month (Custom)', 'APN Project Task Due Date Week (Custom)', 'APN Project Task Main Responsible (Custom)', 'APN Project Task Priority (Custom)', 'APN Project Task Status (Custom)', 'APN Project Task Substatus (Custom)', and 'APN Project Task Type (Custom)'. Below this, there is a 'view' button and a 'New' button.

The bottom screenshot shows the 'Alterview Charts Filter' configuration. It has a 'Save' button, a 'Cancel' button, a 'Reset' button, and a 'Screenshot! (Not licensed)' button. There is also an 'Actions' dropdown menu. The configuration includes a 'PARENT' field with the value '26', a 'FORMULA TYPE' dropdown menu with the value 'Formula Numeric', and a 'FILTER EXPRESSION' field with the value '(internalid)'. On the right side, there is a 'FORMULA OPERATOR' dropdown menu with the value 'Between', and two 'FILTER EXPRESSION VALUE' fields with the values '(custentity_apn_integer)' and '(custentity_apn_integer2)'.

2. Search Summary Field Type

When using Gauge and Gauge Percentage Charts, the searches can produce more than one row even if the Gauge itself need only one result from each search. In this scenario, you need to inform Alterview Charts how to summarize the Value Field that occurs on several rows.

In the case below the search for Gauge Max produces several rows and the result should be the sum all rows. Therefore, when linking your search to the chart (i.e. creating an Alterview Chart Search record) the field Value Field Summary Type should be set to **Sum**.



AVNS Gauge Percentage Chart Search 1: Results

Return To Criteria Edit this Search

FILTERS

STYLE
Normal

TOTAL: 9

PRIMARY CONTACT ▲	GAUGE MAX
- None -	187
Dan Mackenzie	1
Jenn Pidgeon	1
John Merriwell	1
Lars Svensson	1
Meisner Software	1
Nicolas Mejia	1
Per Stormare	1
Stan Smith	1
Total	195

REFERENCE SEARCH
VALUEFIELD SUMMARY TYPE
Sum

3. Chart Title using Alterview Navigator

(only valid when using Alterview Charts together with Alterview Navigator)

When using Alterview Charts together with Alterview Navigator it is possible to use any of the custentity fields that are defined in Alterview Navigator. The syntax is \${id of entityfield}. Only fields with ID starting with "custentity_apn_" can be used.

Example:

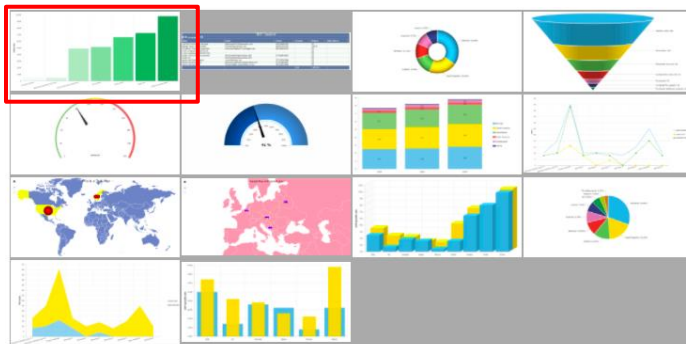
"\${custentity_apn_projecttaskassigned}: Between \${custentity_apn_fromdate} - \${custentity_apn_todate}" would be translated to "Marc Evans: Between 2017-10-12 - 2017-11-12".

CHART EXAMPLES

The configuration of the Alterview Chart record will decide the layout of the chart. Each chart type has specific functionalities and layout options. Please refer to the description of your selected chart type for configuration details.

Bar Chart

The Bar chart is used to compare values for several units to each other, for example sales per employee, sales per month etc.



1. Configure the search

Number of searches: 1

Make sure the saved search is public and to include a Custom Label for the fields which will be displayed in the chart.

The search must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
Customer							
Sales Rep	Group				Sales Rep		
Sales Rep : Image	Group				Image		
Date							
Amount	Sum				Amount		Amount
<div> <input type="text"/> </div> <div> <input type="button" value="Add"/> <input type="button" value="Cancel"/> <input type="button" value="Insert"/> <input type="button" value="Remove"/> <input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Move To Top"/> <input type="button" value="Move To Bottom"/> </div>							

In this DEMO Sales search: Name = Sales Rep & Value = Amount

For Bar charts it is also possible to include an image of the item/unit, by including an image field in the saved search. Make sure to give the image field a Custom Label.

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

DEMO Bar Chart - Top Sales Reps

Save Cancel Reset Screenshot! Actions

General

NAME *
DEMO Bar Chart - Top Sales Reps

TYPE *
Bar Chart

CHART DESCRIPTION
 This is an example of Bar Chart displaying Top Sales Reps.
 Value field is Amount in this example.
 The Chart uses one search: Demo Top Sales Reps (Bar)
 Data is collected from the DEMO Custom Records!

☐ INACTIVE
VALIDATION RESULT

Titles

TITLE
DEMO Bar Chart - Top Sales Reps

TITLE FONT SIZE
14
☒ TITLE BOLD

TITLE ALIGN
Center

Axis

☐ ONLY INTEGERS ON Y-AXIS.

LABEL ON Y-AXIS

LABEL ON X-AXIS

☒ FORCE VALUE AXIS TO START FROM ZERO

Style

COLOR

MAXIMUM NUMBER OF DATA
100

☐ ROTATE GRAPH
☒ DISPLAY LABELS

IMAGE SIZE
50
☒ 3D VIEW

LABEL FOR SUMMARY SLICE

☐ ADD SUMMARY SLICE

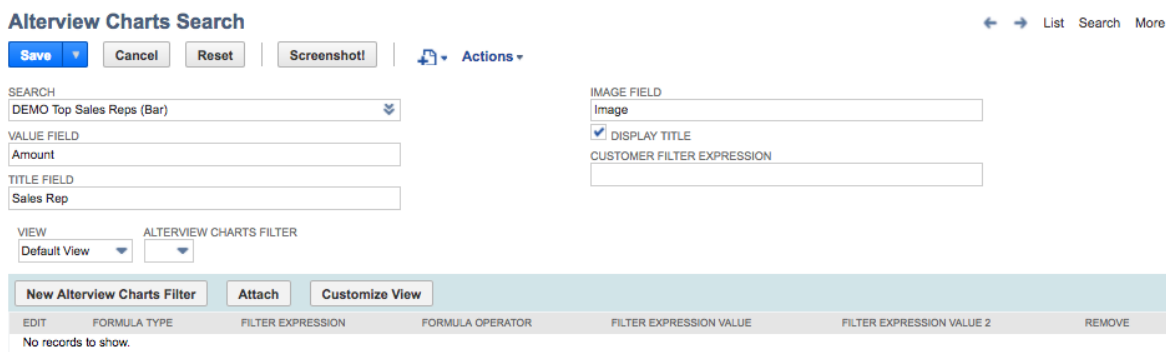
Field Name	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Title Font Size	Font size of chart title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Only Integers on Y-axis	Mark the checkbox to only display integers on Y-axis.
Label on Y-axis	A static label which will be centered vertically in the chart.
Label on X-axis	A static label which will be centered horizontally in the chart.
Force value to start from zero	Mark the checkbox to force the value axis to start from zero.
Color	Select the colors of the bars in the chart.

Maximum number of bars	Optionally set a maximum number of bars to display in the chart. Recommended if your saved search returns too many results. Too much data in a chart will make it cluttered and is not recommended.
Rotate Graph	Rotates the graph 90 degrees clockwise.
Display Labels	Mark the checkbox to display the name of the labels below each bar.
Image size	Image size in pixel.
3D-view	Mark the checkbox for 3D-effect.

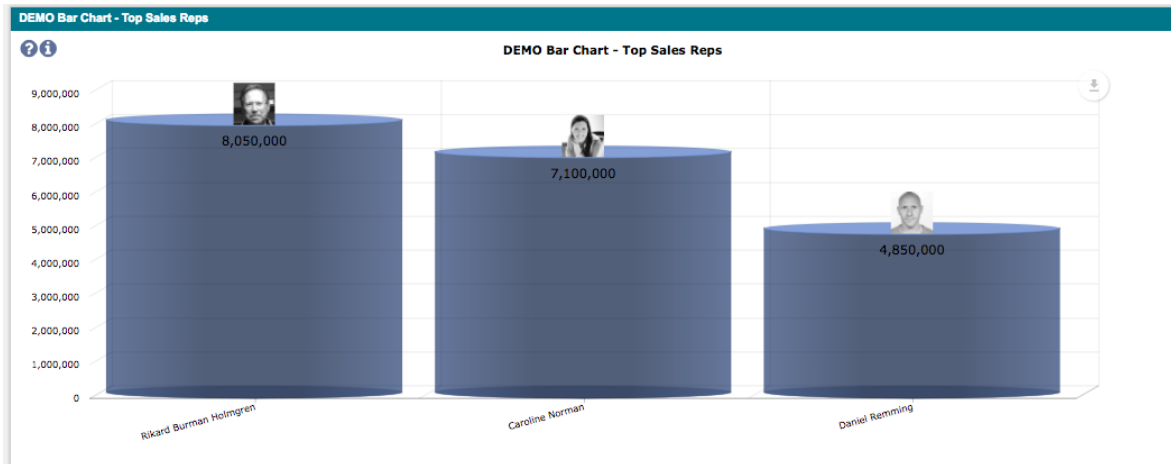
3. Link the search to your chart record

From the Alterview Chart record, click on the button *New Alterview Chart Search* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.

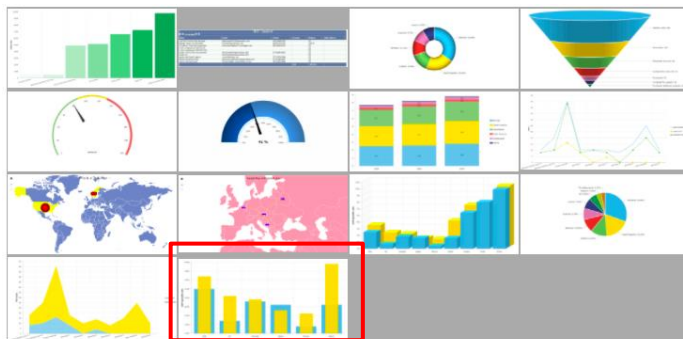


Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label for the column that holds the relevant title for this search.
Image Field	The Custom Label for the column that holds the image. Make sure that the image can be used by the audience that will use the Chart (permissions). (Note that the url could be a relative URL, for example: /core/media/media.nl?id=1284&c=TSTDVR941030&h=6b4a028a1a10d1b7f99a).
Display title	Mark the checkbox to display a title on top of each bar.
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).



Layered Bar Chart

A Layered bar chart presents categorical data with rectangular bars with heights proportional to the values that they represent. With layered bars it is possible to compare data between different periods or calculated result versus actual result for each bar and display the result in layers.



1. Configure the search

Number of searches: 1 or more

Make sure the searches are public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The search must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer	Group				Customer			
Formula (Numeric)	Sum		ROUND({custrecord_demo_sales_amount},0)		Amount Sales		Amount Sales	
Formula (Text)			TO_CHAR({custrecord_demo_sales_date}, 'YYYY-MM')		Year and Month			
Date					Date			
Quantity					Quantity			
Warehouse					Warehouse			
<div> ▼ ✓ Add ✕ Cancel ➕ Insert ➖ Remove ⬆ Move Up ⬇ Move Down ⬅ Move To Top ➡ Move To Bottom </div>								

In this DEMO Sales search: Name = Company, Value = Amount Sales

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer	Group				Customer			
Formula (Numeric)	Sum		ROUND({custrecord_demo_opportunities_amount},0)		Amount Opportunities		Amount Opportunities	
Formula (Text)			TO_CHAR({custrecord_demo_opportunities_date}, 'YYYY-MM')		Year and Month			
Sales Rep					Sales Rep			
Date					Date			
Quantity					Quantity			
Status					Status			
<div> ▼ ✓ Add ✕ Cancel ➕ Insert ➖ Remove ⬆ Move Up ⬇ Move Down ⬅ Move To Top ➡ Move To Bottom </div>								

In this DEMO Opportunities search: Name = Company, Value = Amount Opportunities

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer	Group				Customer			
Formula (Numeric)	Sum		ROUND({custrecord_demo_budget_amount},0)		Amount Budget		Amount Budget	
Formula (Text)			TO_CHAR({custrecord_demo_budget_date}, 'YYYY-MM')		Year and Month			
Sales Rep					Sales Rep			
Date					Date			
Quantity					Quantity			
<div> ▼ ✓ Add ✕ Cancel ➕ Insert ➖ Remove ⬆ Move Up ⬇ Move Down ⬅ Move To Top ➡ Move To Bottom </div>								

In this DEMO Budget search: Name = Company, Value = Amount Budget

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts

← → List Search More

DEMO Layered Bar - Budget vs Sales and Opportunities per Customer

Save
Cancel
Reset
Screenshot
Actions

General

CUSTOM FORM
Alterview Layered Bar Chart

TYPE
Layered Bar Chart

NAME
DEMO Layered Bar - Budget vs Sales and Opportunities per Customer

CHART DESCRIPTION

Arial

This is an example of Layered Bar Chart displaying Budget vs Sales and Opportunities per Customer.

Color Theme: Custom Theme: Blue/Turquoise

Value field is a formula on Amount rounded to 0 decimals in this example.

☐ INACTIVE

VALIDATION RESULT

Title

TITLE
DEMO Layered Bar - Budget vs Sales and Opportunities per Customer

TITLE FONTSIZE
14

☒ TITLE BOLD

TITLE ALIGN
Center

Style

LABEL FOR SUMMARY SLICE

☐ ADD SUMMARY SLICE

☒ DISPLAY LABELS

☒ DISPLAY LEGEND

MAXIMUM NUMBER OF DATA
100

☐ ROTATE GRAPH

COLOR HUE
Custom Theme: Blue/Turquoise

COLOR LUMINOSITY
Bright

Axis

LABEL ON X-AXIS

LABEL ON Y-AXIS

☐ ONLY INTEGERS ON Y-AXIS.

☒ FORCE VALUE AXIS TO START FROM ZERO

Field Name	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Title Font Size	Font size of chart title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Display Labels	Mark the checkbox to display the name of the labels below each bar.
Display Legend	Mark the checkbox to display the legend for each bar to the right of the chart.
Maximum number of data	Optionally set a maximum number of bars to display in the chart. Recommended if your saved search returns too many results. Too much data in a chart will make it cluttered and is not recommended.
Rotate Graph	Rotates the graph 90 degrees clockwise.
Color hue	The color hue of the bars.
Color Luminosity	The color luminosity of the bars.
Label on X-axis	A static label which will be centered horizontally in the chart.

Label on Y-axis	A static label which will be centered vertically in the chart.
Only integers on Y-axis	Mark the checkbox to only show integers on Y-axis.
Force value axis to start from zero	Mark the checkbox to force the value axis to start from zero.

3. Link the search to your chart record

For the Layered Bar chart it is recommended to include at least two *Altview Chart Search* records. It is possible to use the same saved search for every Altview Chart Search record or to use different saved searches for each Altview Chart Search record.

New Altview Charts Search							
EDIT	ORDER	SEARCH *	VALUE FIELD	TITLE FIELD	IMAGE FIELD	REFERENCE SEARCH	REMOVE
Edit	1	DEMO Budget (Layered Bar Chart)	Amount Budget	Customer		Yes	Remove
Edit	3	DEMO Opportunities (Layered Bar Chart)	Amount Opportunities	Customer		No	Remove
Edit	2	DEMO Sales (Layered Bar Chart)	Amount Sales	Customer		No	Remove

In this example three different saved search has been to display data in the chart.

From the Altview Chart record, click on the button *New Altview Chart Serarch* to create a new Altview Chart Search child record to you chart. Enter information in the fields as described below. To display several values in one layered bar, the values are grouped into the same bar by using the same Title field for each Altview Charts Search record.

Please note that *Altview Charts Filter* is only needed when using *Altview Navigator* to filter the chart.

Altview Charts Search

Save

Cancel

Reset

Screenshot

Actions

SEARCH

DEMO Sales (Layered Bar Chart)

VALUE FIELD

Amount Sales

TITLE FIELD

Customer

ORDER

2

VIEW

Default View

ALTERVIEW CHARTS FILTER

REFERENCE SEARCH

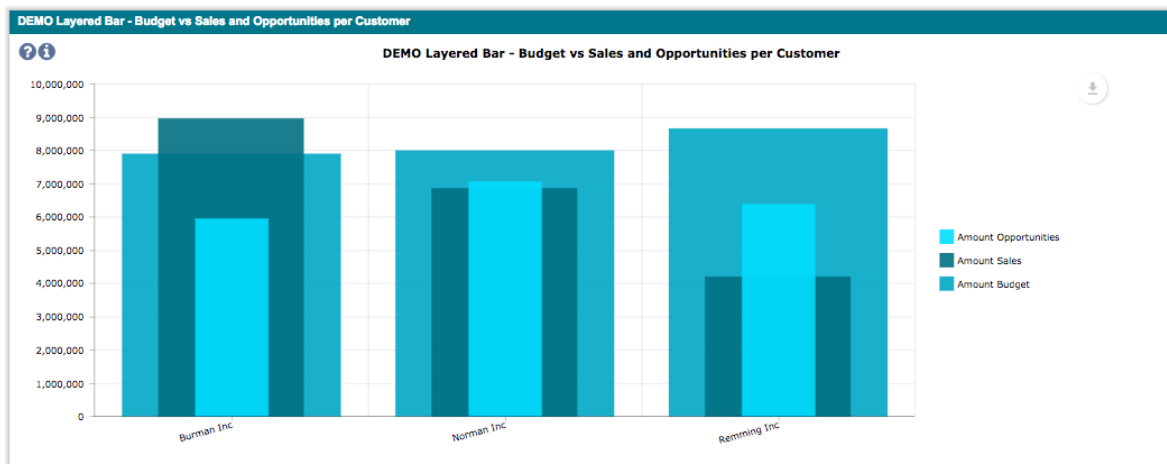
SHOW MAIN SEARCH

CUSTOMER FILTER EXPRESSION

New Altview Charts Filter							
EDIT	FORMULA TYPE	FILTER EXPRESSION	FORMULA OPERATOR	FILTER EXPRESSION VALUE	FILTER EXPRESSION VALUE 2	REMOVE	
No records to show.							

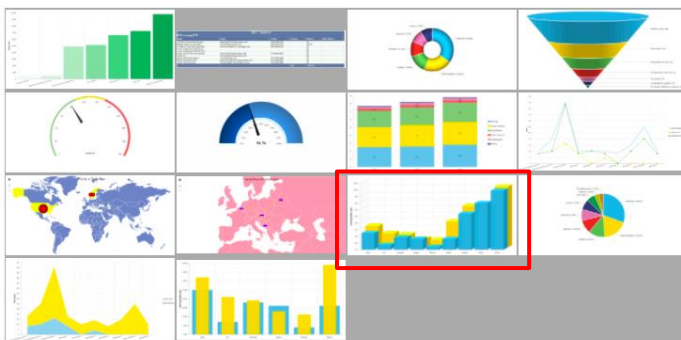
Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label for the column that holds the relevant title for this search.
Order	Each saved search will be layered on top of each other. The order field will control both legend and the order of how the result is layered.
Reference Search	When a maximum number of data has been set for the chart, and the different searches returns different number of results, one of the searches must be set as reference search to define which results to show and in which order.

Show main search	If both Reference Search and Show main search is checked, this search will not show up in the chart and only work as a reference for the other searches.
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer. Example 1:[customermain.internalidnumber,equalto,{id}] Example 2:[entityid,anyof,{id}] Example 3:[formulanumeric: {internalid},equalto,{id}] Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.
Altview Charts Filter	Only needed when using <i>Altview Navigator</i> to filter the chart (please refer to Additional Filters).



Multi Bar Chart

In a multi bar chart, two or more sets of inter related data are represented, with the different sets layered in a 3D view. To make the chart readable the order of the different sets is important, to make sure the bars do not hide one another.



1. Configure the search

Number of searches: 1 or more

Make sure the searches are public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The search must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Formula (Text)	Group		TO_CHAR((custrecord_demo_sales_date), 'YYYY-MM')		Year and Month			
Formula (Numeric)	Sum		ROUND((custrecord_demo_sales_amount),0)		Amount Sales		Amount Sales	
Customer					Customer			
Date					Date			
Quantity					Quantity			
Warehouse					Warehouse			

In this DEMO Sales search: Name = Company, Value = Amount Sales

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Formula (Text)	Group		TO_CHAR((custrecord_demo_opportunities_date), 'YYYY-MM')		Year and Month			
Formula (Numeric)	Sum		ROUND((custrecord_demo_opportunities_amount),0)		Amount Opportunities		Amount Opportunities	
Customer					Customer			
Sales Rep					Sales Rep			
Date					Date			
Quantity					Quantity			
Status					Status			

In this DEMO Opportunities search: Name = Company, Value = Amount Opportunities

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Formula (Text)	Group		TO_CHAR((custrecord_demo_budget_date), 'YYYY-MM')		Year and Month			
Formula (Numeric)	Sum		ROUND((custrecord_demo_budget_amount),0)		Amount Budget		Amount Budget	
Customer					Customer			
Sales Rep					Sales Rep			
Date					Date			
Quantity					Quantity			

In this DEMO Budget search: Name = Company, Value = Amount Budget

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Altview Charts

← → List Search More

DEMO Multi Bar Chart - Budget, Opportunities and Sales

General

CUSTOM FORM
Altview Multi Bar Chart

TYPE
Multi Bar Chart

NAME
DEMO Multi Bar Chart - Budget, Opportunities and Sales

CHART DESCRIPTION

This is an example of Multi Bar Chart displaying Budget vs Opportunities and Sales.

Value field is a formula on Amount rounded to 0 decimals in this example.

The Chart uses three searches:
Demo Budget (Line and Multibar)

☐ INACTIVE

VALIDATION RESULT

Title

TITLE
DEMO Multi Bar Chart - Budget, Opportunities and Sales

TITLE FONTSIZE
14

☒ TITLE BOLD

TITLE ALIGN
Center

Style

MAXIMUM NUMBER OF DATA
100

☐ ADD SUMMARY SLICE

COLOR HUE
Chart Original Colors

COLOR LUMINOSITY
Bright

☒ DISPLAY LABELS

☒ DISPLAY LEGEND

☐ ROTATE GRAPH

Axis

LABEL ON Y-AXIS

LABEL ON X-AXIS

☐ ONLY INTEGERS ON Y-AXIS

☒ FORCE VALUE AXIS TO START FROM ZERO

Field Name	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Altview Charts with Altview Navigator extra info is available (please refer to Chart Title Using Altview Navigator).
Title Font Size	Font size of chart title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Maximum number of data	Optionally set a maximum number of bars to display in the chart. Recommended if your saved search returns too many results. Too much data in a chart will make it cluttered and is not recommended.
Color hue	The color hue of the bars.
Color Luminosity	The color luminosity of the bars.
Display Labels	Mark the checkbox to display the name of the labels below each bar.
Display Legend	Mark the checkbox to display the legend for each bar to the right of the chart.
Rotate Graph	Rotates the graph 90 degrees clockwise.
Label on X-axis	A static label which will be centered horizontally in the chart.
Label on Y-axis	A static label which will be centered vertically in the chart.
Only integers on Y-axis	Mark the checkbox to only show integers on Y-axis.
Force value axis to start from zero	Mark the checkbox to force the value axis to start from zero.

3. Link the search to your chart record

For the Multi Bar chart it is recommended to include at least two *Alterview Chart Search* records. It is possible to use the same saved search for every Alterview Chart Search record or to use different saved searches for each Alterview Chart Search record.

New Alterview Charts Search							
		Attach	Customize View				
EDIT	ORDER	SEARCH *	VALUE FIELD	TITLE FIELD	IMAGE FIELD	REFERENCE SEARCH	REMOVE
Edit	3	DEMO Budget (Chart)	Amount Budget	Year and Month		Yes	Remove
Edit	2	DEMO Opportunities (Chart)	Amount Opportunities	Year and Month		No	Remove
Edit	1	DEMO Sales (Chart)	Amount Sales	Year and Month		No	Remove

In this example three different saved search has been selected to display data in the chart.

From the Alterview Chart record, click on the button *New Alterview Chart Serarch* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below. To display several values in one layered bar, the values are grouped into the same bar by using the same Title field for each Alterview Charts Search record.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.

Alterview Charts Search
← → List Search More

Save
Cancel
Reset
Screenshot
Actions

SEARCH
DEMO Sales (Chart)

VALUE FIELD
Amount Sales

TITLE FIELD
Year and Month

ORDER
1

VIEW
Default View

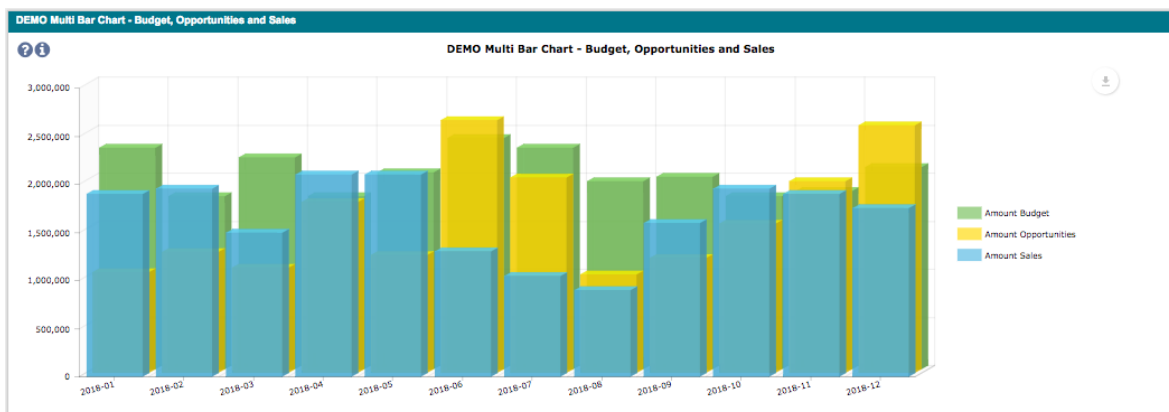
☐ REFERENCE SEARCH
☐ SHOW MAIN SEARCH

CUSTOMER FILTER EXPRESSION

New Alterview Charts Filter						
		Attach	Customize View			
EDIT	FORMULA TYPE	FILTER EXPRESSION	FORMULA OPERATOR	FILTER EXPRESSION VALUE	FILTER EXPRESSION VALUE 2	REMOVE
No records to show.						

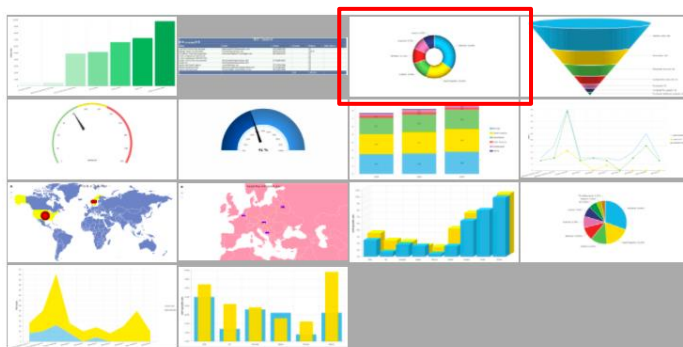
Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label for the column that holds the title.
Order	Each saved search will be layered on top of each other. The order field will control both legend and the order of how the result is layered.
Reference Search	When a maximum number of data has been set for the chart, and the different searches returns different number of results, one of the searches must be set as reference search to define which results to show and in which order.
Show main search	If both Reference Search and Show main search is checked, this search will not show up in the chart and only work as a reference for the other searches.

Customer Filter Expression	<p>If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.</p> <p>Example 1:[customermain.internalidnumber,equalto,{id}]</p> <p>Example 2:[entityid,anyof,{id}]</p> <p>Example 3:[formulanumeric: {internalid},equalto,{id}]</p> <p>Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.</p>
Alterview Charts Filter	<p>Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).</p>



Donut Chart

Donut charts is a good choice when visualizing for example market share per company.



1. Configure the search

Number of searches: 1

Make sure the saved search is public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The search must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Status	Group				Status			
Quantity	Count				Quantity		Quantity	
Amount								
Customer								
Sales Rep								
Date								

In this DEMO Opportunities search: Name = Status, Value = Quantity

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts List Search More

DEMO Donut Chart - Opportunities per Status

Save Cancel Reset Screenshot Actions

General

CUSTOM FORM: Alterview Donut Chart

TYPE: Donut Chart

NAME: DEMO Donut Chart - Opportunities per Status

CHART DESCRIPTION: This is an example of Donut Chart displaying Opportunities per Status. Value field is Quantity in this example. The Chart uses one search: Demo Opportunities (Donut and Pie) Data is collected from the DEMO Custom Records!

Title

TITLE: DEMO Donut Chart - Opportunities per Status (Quantity)

TITLE FONT SIZE: 14

TITLE BOLD: ☒

TITLE ALIGN: Center

Style

ADD SUMMARY SLICE: ☐

LABEL FOR SUMMARY SLICE:

MAXIMUM NUMBER OF DATA: 100

DISPLAY LABELS: ☐

DISPLAY LEGEND: ☒

LABEL MAX WIDTH: 250

COLOR HUE: Chart Original Colors

COLOR LUMINOSITY: Bright

3D VIEW: ☒

Field Name	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Title Font Size	Font size of chart title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.

Add Summary Slice	Mark the checkbox to add a summary slice. When the number of result rows in the saved search exceeds the "Maximum number of data" set in the Alterview Charts record an extra slice will be added, which holds the aggregated value of the remaining result rows.
Label for summary slice	The name of the summary slice which holds the aggregated value of the remaining result rows.
Maximum number of data	Optionally set a maximum number of data to display in the chart. Recommended if your saved search returns too many results. Too much data in a chart will make it cluttered and is not recommended.
Display Labels	Mark the checkbox to display the name of the labels for each slice.
Display legend	Mark the checkbox to display the legend for each bar to the right of the chart.
Label max width	The label width is the width in pixels for both the legend and the labels. If the width is too small, all labels will be wrapped character per character and not word by word.
Color hue	The color hue of the slices.
Color Luminosity	The color luminosity of the slices.
3D-view	Mark the checkbox for 3D-effect.

3. Link the search to your chart record

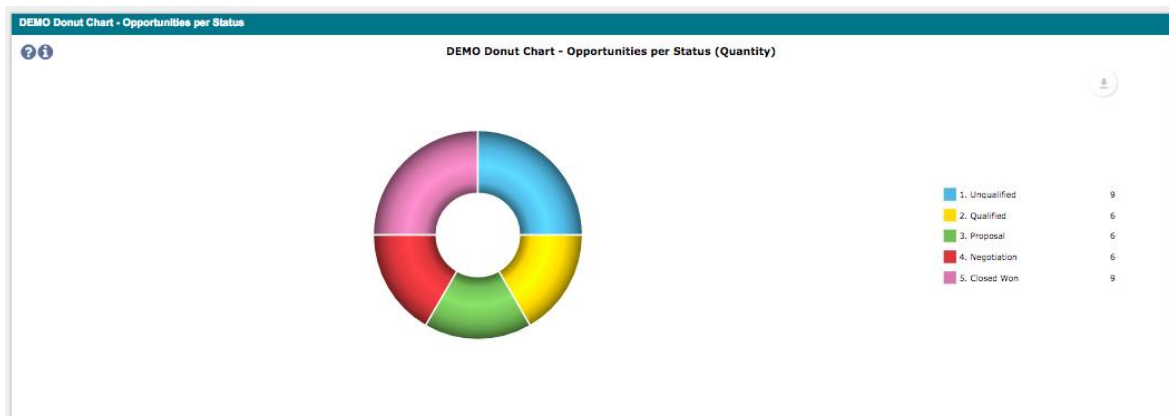
From the Alterview Chart record, click on the button *New Alterview Chart Search* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.



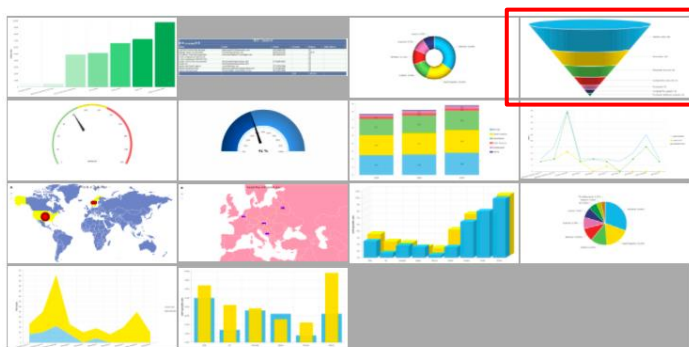
Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label for the column that holds the title.
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.

	<p>Example 1:[customermain.internalidnumber,equalto,{id}]</p> <p>Example 2:[entityid,anyof,{id}]</p> <p>Example 3:[formulanumeric: {internalid},equalto,{id}]</p> <p>Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.</p>
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).



Funnel Chart

Funnel charts is a great chart to use to represent stages in a sales process and show the amount of potential revenue for each stage. This type of chart can also be useful in identifying potential problem areas in an organization's sales processes.



1. Configure the search

Number of searches: 1

Make sure the saved search is public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The search must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Status	Group				Status			
Amount	Sum				Amount		Amount	
Customer								
Sales Rep								
Date								
Quantity								

In this DEMO Opportunities search: Name = Status, Value = Amount

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts ← → List Search More

DEMO Funnel Chart - Opportunities per Status

Save **Cancel** **Reset** **Screenshot!** **Actions**

General

CUSTOM FORM
Alterview Funnel Chart

TYPE
Funnel Chart

NAME
DEMO Funnel Chart - Opportunities per Status

CHART DESCRIPTION

☐ INACTIVE

VALIDATION RESULT

Title

TITLE
DEMO Funnel Chart - Opportunities per Status (Amount)

TITLE FONT SIZE
14

☒ TITLE BOLD

TITLE ALIGN
Center

Style

☐ ADD SUMMARY SLICE

LABEL FOR SUMMARY SLICE

MAXIMUM NUMBER OF DATA
100

NECK HEIGHT

LABEL MAX WIDTH
400

☐ DISPLAY LABELS

☒ DISPLAY LEGEND

COLOR HUE
Chart Original Colors

COLOR LUMINOSITY
Bright

☒ 3D VIEW

Field	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Font Size	Font size of chart title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.

Add Summary Slice	Mark the checkbox to add a summary slice. When the number of result rows in the saved search exceeds the "Maximum number of data" set in the Alterview Charts record an extra slice will be added, which holds the aggregated value of the remaining result rows.
Label for summary slice	The name of the summary slice which holds the aggregated value of the remaining result rows.
Maximum number of data	Optionally set a maximum number of data to display in the chart. Recommended if your saved search returns too many results. Too much data in a chart will make it cluttered and is not recommended.
Neck height	Neck height of funnel in percent.
Label max width	The label width is the width in pixels for both the legend and the labels. If the width is too small, all labels will be wrapped character per character and not word by word.
Display Labels	Mark the checkbox to display the name of the labels for each slice.
Display Legend	Mark the checkbox to display the legend for each bar on the right hand side of the chart.
Color hue	The color hue of the slices.
Color Luminosity	The color luminosity of the slices.
3D-view	Mark the checkbox for 3D-effect.

3. Link the search to your chart record

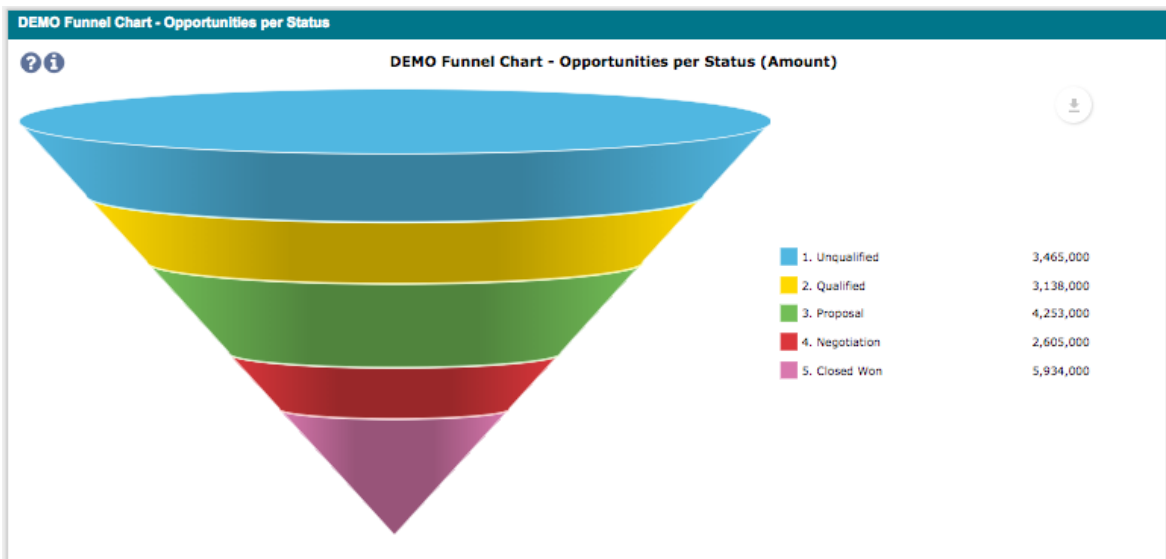
From the Alterview Chart record, click on the button *New Alterview Chart Search* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.



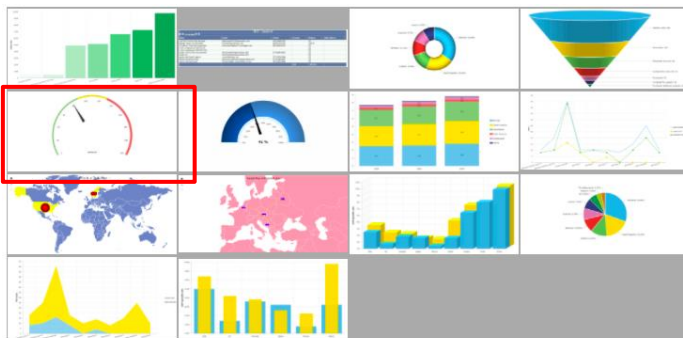
Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label for the column that holds the title.
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.

	<p>Example 1:[customermain.internalidnumber,equalto,{id}]</p> <p>Example 2:[entityid,anyof,{id}]</p> <p>Example 3:[formulanumeric: {internalid},equalto,{id}]</p> <p>Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.</p>
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).



Gauge Chart

The Gauge chart is used to compare two values with each other. By coloring the gauge we could also give the user a hint if the value is acceptable or not.



1. Configure the search

Number of searches: 1 or 2

In order use the gauge chart the saved search/searches needs to contain two value fields, one containing the max value (**reference search**) and one containing the actual value to compare (**compare value search**). The data can be collected from two different searches or from one single search, if both max value and compare value exist in the same search.

There are two options for creating searches for Gauge Charts:

- A Summary Search that produces only one row.
- A Grouped summary search that produces several rows

Make sure the saved searches are public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The *reference search* must include 2 columns:

1. Name (will not be displayed in the chart)
2. Value (the max value for the gauge, will be displayed in the chart)

The *compare search* must include 2 columns:

1. Name (will not be displayed in the chart)
2. Value (the compare value for the gauge, will be displayed in the chart)

If the underlying data is of great importance for the user, a Summary search that produces several rows is the best choice. If the searches produce more than one row, the functionality [Search Summary Field Type](#) needs to be used.

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer	Group				Customer			
Sales Rep								
Date								
Amount								
Quantity	Sum				Budget Quantity		Budget Quantity	
<div> ▼ Add ✕ Cancel ➕ Insert ➖ Remove ⬆ Move Up ⬇ Move Down ⬆ Move To Top ⬇ Move To Bottom </div>								

In this DEMO Budget search: Name = Customer, Value (max) = Budget Quantity

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer	Group							
Sales Rep								
Date								
Amount								
Quantity	Sum				Sales Quantity		Sales Quantity	
<div> ▼ Add ✕ Cancel ➕ Insert ➖ Remove ⬆ Move Up ⬇ Move Down ⬆ Move To Top ⬇ Move To Bottom </div>								

In this DEMO Budget search: Name = Customer, Value (compare) = Sales Quantity

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts

DEMO Gauge Chart - Sales vs Budget (Quantity)

CUSTOM FORM

Alterview Gauge Chart

TYPE

Gauge Chart

NAME

DEMO Gauge Chart - Sales vs Budget (Quantit

CHART DESCRIPTION

Arial

This is an example of Gauge Chart displaying Sales vs Budget.

Value field is Quantity in this example.

The Chart uses two searches:

Demo Sales Quantity (Gauge Chart)

Demo Budget Quantity (Gauge Chart)

INACTIVE

VALIDATION RESULT

TITLE

DEMO Gauge Chart - Sales vs Budget (Quantity)

TITLE FONTSIZE

14

☒ TITLE BOLD

TITLE ALIGN

Center

Style

VALUE INTERVAL

4

SECOND COLOR START

30%

SECOND COLOR END

70%

☐ REVERSE COLOR BAND

TOPTEXT FONT SIZE

9

BOTTOM TEXT

Budget: \${Budget Quantity}

BOTTOM TEXT FONT SIZE

14

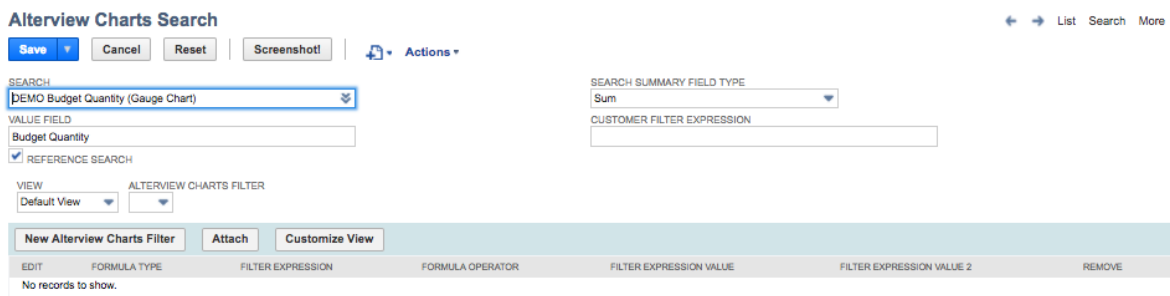
Field	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Font Size	Font size of chart title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Value interval	Absolute interval between values shown on gauge. If set to 20 and max value is 195 the gauge will show labels with values in steps of 20 until 200. If left empty or set to zero, the interval is set to auto.
Second color start	The value where the gauge band turns yellow. This can be absolute value or percentage value.
Second color end	The value where the gauge yellow band change color. This can be absolute value or percentage value.
Reverse color band	If set, the color band colors green and red change places on gauge.
Top Text Font Size	The size of the text in the center of the gauge.
Bottom text	<p>The text at the bottom of the gauge. The text can be a combination of a static text and dynamic values from the search. The syntax for a dynamic value is \${Value Field}.</p> <p><i>Example:</i></p> <p>If the Custom Label for the reference value (195) is "Estimated Work" and the Custom Label for the compare value (167) is "Actual Work":</p> <p>"Estimated: \${Estimated Work}" will produce "Estimated: 195"</p>

	"\${Actual Work}(\${Estimated Work})" will produce "167(195)"
Bottom Text	The size of the text at the bottom of the gauge.
Font Size	

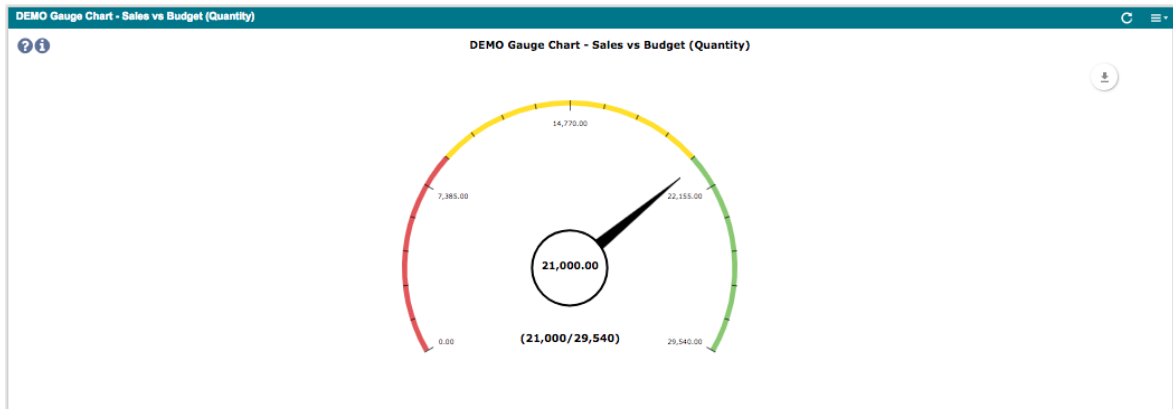
3. Link the search to your chart record

From the Alterview Chart record, click on the button *New Alterview Chart Search* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.

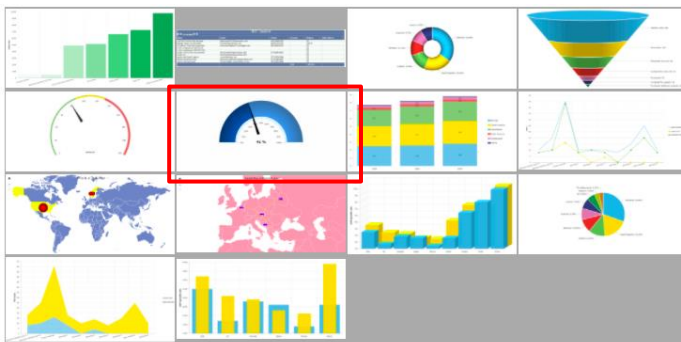


Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Reference Search	Mark the checkbox if the search is the reference search.
Search Summary Field Type	Please refer to Search Summary Field Type
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer. Example 1:[customermain.internalidnumber,equalto,{id}] Example 2:[entityid,anyof,{id}] Example 3:[formulanumeric: {internalid},equalto,{id}] Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).



Gauge Percentage Chart

The Gauge percentage chart is used to compare two values with each other. By coloring the gauge, we could also give the user a hint if the value is acceptable or not.



1. Configure the search

Number of searches: 1 or 2

In order use the gauge percentage chart the saved search/searches needs to contain two value fields, one containing the max value (**reference search**) and one containing the actual value to compare (**compare value search**). The data can be collected from two different searches or from one single search, if both max value and compare value exist in the same search.

There are two options for creating searches for Gauge Percentage Charts:

- A Summary Search that produces only one row.
- A Grouped summary search that produces several rows

Make sure the saved searches are public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The *reference search* must include 2 columns:

1. Name (will not be displayed in the chart)
2. Value (the max value for the gauge, will be displayed in the chart)

The *compare search* must include 2 columns:

1. Name (will not be displayed in the chart)
2. Value (the compare value for the gauge, will be displayed in the chart)

If the underlying data is of great importance for the user, a Summary search that produces several rows is the best choice. If the searches produce more than one row, the functionality [Search Summary Field Type](#) needs to be used.

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer	Group				Customer			
Sales Rep								
Date								
Amount	Sum				Budget Amount		Budget Amount	
Quantity								

In this DEMO Budget search: Name = Customer, Value (max) = Budget Amount

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer	Group							
Sales Rep								
Date								
Amount	Sum				Sales Amount		Sales Amount	
Quantity								

In this DEMO Sales search: Name = Customer, Value (max) = Sales Amount

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts

DEMO Gauge Percentage Chart - Sales vs Budget

General

CUSTOM FORM
Alterview Gauge Percentage Chart

TYPE
Gauge Percentage Chart

NAME *

DEMO Gauge Percentage Chart - Sales vs Budget

CHART DESCRIPTION

Arial

This is an example of Gauge Percentage Chart displaying Sales vs Budget.

Value field is Amount in this example.

The Chart uses two searches:
Demo Sales Amount (Gauge Percentage Chart)
Demo Budget Amount (Gauge Percentage Chart)
Data is collected from the DEMO Custom Records!

☐ INACTIVE

VALIDATION RESULT

Title

TITLE
DEMO Gauge Percentage Chart - Sales vs Budget

TITLE FONT SIZE
14

☒ TITLE BOLD

TITLE ALIGN
Center

Style

COLOR HUE *

Chart Original Colors

COLOR LUMINOSITY *

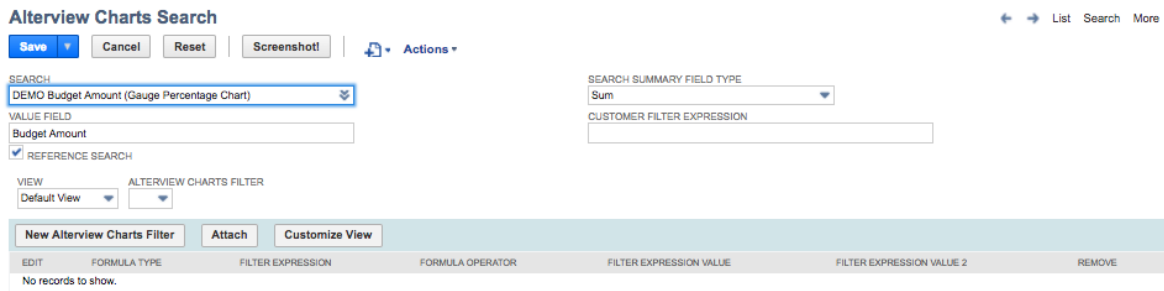
Bright

Field	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the “?” icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Font size	Font size of chart title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Color Hue	The color hue of the chart.
Color Luminosity	The color luminosity of the chart.

3. Link the search to your chart record

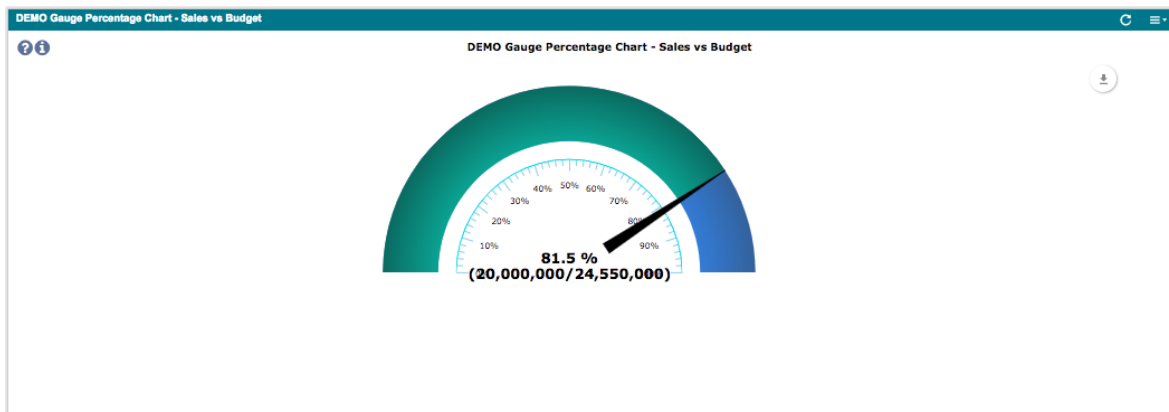
From the Alterview Chart record, click on the button *New Alterview Chart Search* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.



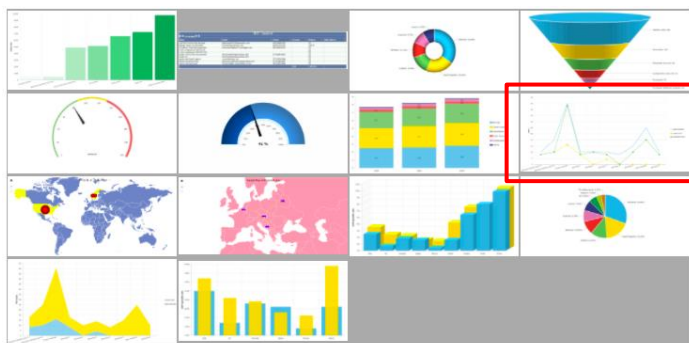
Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Reference Search	Mark the checkbox if the search is the reference search.
Search Summary Field Type	Please refer to Search Summary Field Type
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.

	<p>Example 1:[customermain.internalidnumber,equalto,{id}]</p> <p>Example 2:[entityid,anyof,{id}]</p> <p>Example 3:[formulanumeric: {internalid},equalto,{id}]</p> <p>Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.</p>
Altview Charts Filter	Only needed when using <i>Altview Navigator</i> to filter the chart (please refer to Additional Filters).



Line Chart

The line chart is often used to show trends over time.



1. Configure the search

Number of searches: 1 or more

To display data in the line chart, at least one saved search is needed, but more likely the chart will display data from several saved searches to compare data over time. The data can be collected from two different searches or from one single search.

When using the line chart it is recommended to also include a **reference search**. The reference search contains all the x-values which should be displayed in the chart.

Make sure the searches are public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The searches must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Formula (Text)	Group		TO_CHAR((custrecord_demo_sales_date), 'YYYY-MM')		Year and Month			
Formula (Numeric)	Sum		ROUND((custrecord_demo_sales_amount),0)		Amount Sales		Amount Sales	
Customer					Customer			
Date					Date			
Quantity					Quantity			
Warehouse					Warehouse			

In this DEMO Sales search: Title = Year and Month, Value = Amount Sales

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Formula (Text)	Group		TO_CHAR((custrecord_demo_opportunities_date), 'YYYY-MM')		Year and Month			
Formula (Numeric)	Sum		ROUND((custrecord_demo_opportunities_amount),0)		Amount Opportunities		Amount Opportunities	
Customer					Customer			
Sales Rep					Sales Rep			
Date					Date			
Quantity					Quantity			
Status					Status			

In this DEMO Opportunities search: Title = Year and Month, Value = Amount Opportunities

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Formula (Text)	Group		TO_CHAR((custrecord_demo_budget_date), 'YYYY-MM')		Year and Month			
Formula (Numeric)	Sum		ROUND((custrecord_demo_budget_amount),0)		Amount Budget		Amount Budget	
Customer					Customer			
Sales Rep					Sales Rep			
Date					Date			
Quantity					Quantity			

In this DEMO Budget search: Title = Year and Month, Value = Amount Budget

When creating a search over different time periods, some periods might be missing (for example if there are no invoices created for a specific period). In this case it is recommended to create a reference search which contains all periods. If the purpose of the reference search is to make sure all x-values are present, the search itself should not be visible in the chart.

The reference search contains the x-values we would like to display in the chart. The other searches compare value searches contains data for different periods.

2. Create the chart record

After the searches are created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts ← → List Search More

DEMO Line Chart - Budget vs Sales vs Opportunities

[Save](#) [Cancel](#) [Reset](#) [Screenshot](#) [Actions](#)

General

CUSTOM FORM
Alterview Line Chart

TYPE
Line Chart

NAME *
DEMO Line Chart - Budget vs Sales vs Oppor

CHART DESCRIPTION

This is an example of Line Chart displaying Budget vs Opportunities and Sales.

Value field is a formula on Amount rounded to 0 decimals in this example.

The Chart uses three searches:
Demo Budget (Line and Multibar)
Demo Opportunities (Line and Multibar)
Demo Sales (Line and Multibar)
Data is collected from the DEMO Custom Records!

☐ INACTIVE

MAXIMUM NUMBER OF DATA
100

VALIDATION RESULT

Title

TITLE
DEMO Line Chart - Budget vs Sales vs Opportunities

TITLE FONT SIZE
14

☒ TITLE BOLD

TITLE ALIGN
Center

Style

☒ USE BULLETS
☐ ROTATE GRAPH

☒ DISPLAY LABELS
☒ DISPLAY LEGEND

LABEL MAX WIDTH
250

Axis

LABEL ON Y-AXIS

LABEL ON X-AXIS

☐ ONLY INTEGERS ON Y-AXIS

☒ FORCE VALUE AXIS TO START FROM ZERO

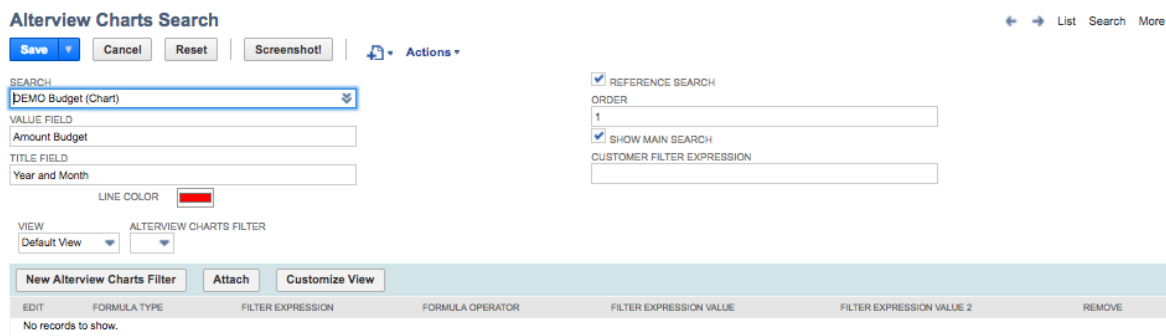
Field	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Maximum number of data	Number of points (x,y) that will be displayed in the chart. If a reference search is defined, that search will be used when finding out how many values to display.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Font size	Font size of Chart Title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Use bullets	Mark the checkbox to display a bullet for each value point in the chart. When hovering over the bullet, a tooltip will be displayed with following syntax: [value field], [label on y-axis] X:Y
Rotate Graph	Rotates the graph 90 degrees clockwise.
Display Labels	Mark the checkbox to display the name of the labels below each bar.
Display Legend	Mark the checkbox to display the legend for each bar to the right of the chart.
Label max width	The width of the labels below the x-axis.
Label on Y-axis	A static label which will be centered vertically in the chart.
Only integers on Y-axis	Only show integers on Y-axis.

Label on X-axis	A static label which will be centered horizontally in the chart.
Force value axis to start from zero	Mark the checkbox to force the value axis to start from zero.

3. Link the search to your chart record

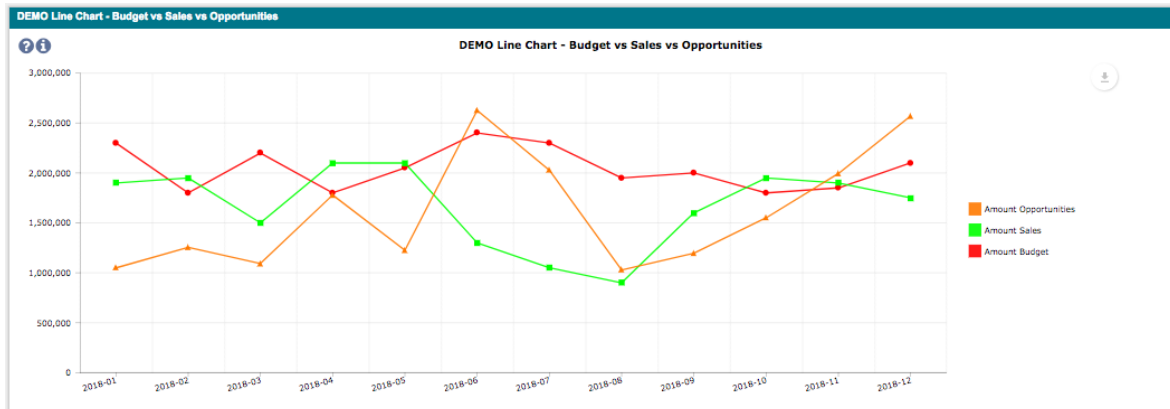
From the Alterview Chart record, click on the button *New Alterview Chart Search* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below. To display several values in one line chart, the values are grouped into the same bar by using the same Title field for each Alterview Charts Search record.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.



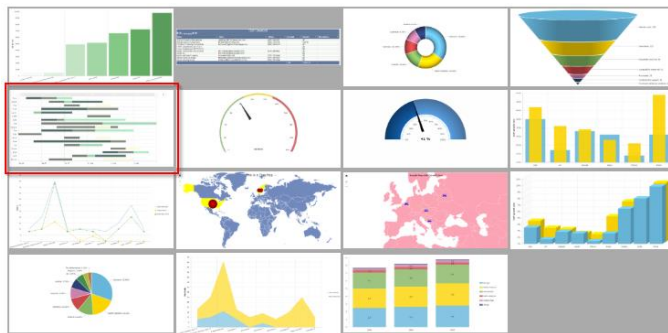
Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label for the column that holds the title.
Line Color	The color of the line. If set, all Alterview Chart Searches connected to this chart must have a color defined.
Reference Search	When a maximum number of data has been set for the chart, and the different searches returns different number of results, one of the searches must be set as reference search to define which results to show and in which order.
Order	Controls the order of the legends.
Show main search	If both Reference Search and Show main search is checked, this search will not show up in the chart and only work as a reference for the other searches.
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer. Example 1:[customermain.internalidnumber,equalto,{id}] Example 2:[entityid,anyof,{id}] Example 3:[formulanumeric: {internalid},equalto,{id}]

	Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).



Gantt Chart (Beta)

The line chart is often used to show activities over a day based timeline.



4. Configure the search

Number of searches: 1 or more

To display data in the gantt chart, at least one saved search is needed, but it is possible to display data from several saved searches.

Make sure the searches are public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

It is important that the labels in the search have "H:" in front of the title- and color-field and "L:" in front of the Value, Start- and End Date fields.

The searches must include a minimum of 4 columns:

1. Title (Each unique title will be a single line in the gantt-chart. Preferably label "H:Title")

2. Value (For each value a box will be added, this is the label for that box. Preferably label "L:Value")
3. Start Date (The start date for the gantt-box. Preferably label "L:StartDate")
4. End Date (The end date for the gantt-box. Preferably label "L:EndDate")

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Assigned To					H:Title			
Task Title					L:Value			
Start Date					L:StartDate			
Formula (Date)			NVL((completeddate),(startdate)+1)		L:EndDate			

5. Create the chart record

After the searches are created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts ← → List Search

DEMO Gantt Chart

[Edit](#) [Back](#) [Screenshot!](#) [Print](#) [Actions](#)

General

NAME DEMO Gantt Chart <input type="checkbox"/> INACTIVE	TYPE Gantt Chart MAXIMUM NUMBER OF DATA 100	CHART DESCRIPTION
---	--	-------------------

Title

TITLE ALIGN Center	TITLE X-POSITION	<input checked="" type="checkbox"/> BOLD
TITLE DEMO Gantt Chart Title	FONT SIZE	

Style

<input type="checkbox"/> DISPLAY LEGEND LEGEND FONT SIZE 11	HUE Chart Original Colors	LUMINOSITY Bright
---	------------------------------	----------------------

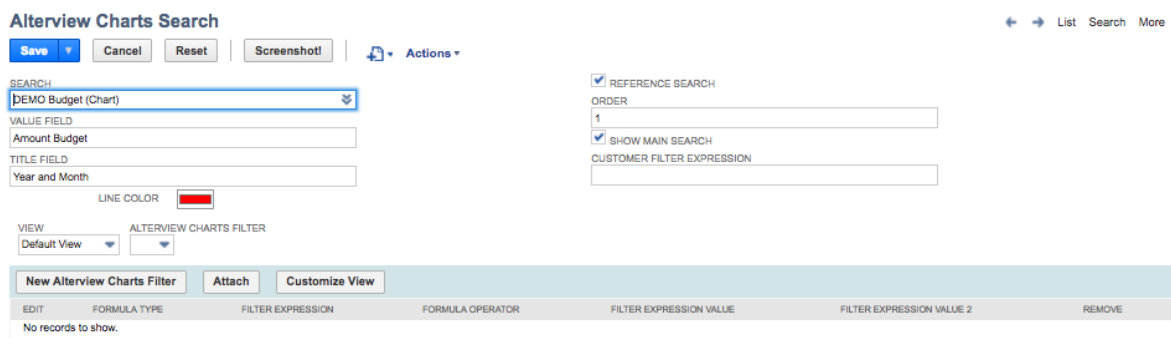
ALTERVIEW NAVIGATOR

Field	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Maximum number of data	Number of points (x,y) that will be displayed in the chart. If a reference search is defined, that search will be used when finding out how many values to display.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Font size	Font size of Chart Title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Display Legend	Mark the checkbox to display the legend for each row on the bottom of the chart.

6. Link the search to your chart record

From the Alterview Chart record, click on the button *New Alterview Chart Search* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below. To display several values on one row in the gantt chart, the values are grouped into the same row by using the same Title field for each Alterview Charts Search record.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.

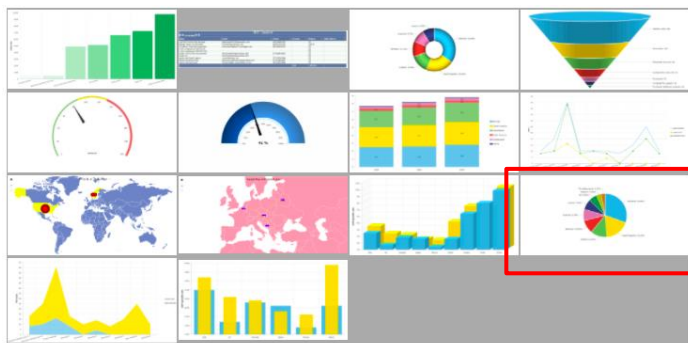


Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label for the column that holds the title.
Start Date Field	The Custom Label for the column that holds the start date for this box
End Date Field	The Custom Label for the column that holds the end date for this box
Gantt color field	This is optional, but you can set the custom label in the search that holds a color-value to color this specific box in a certain color.
Order	Controls the order of the legends.
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.

Example 1:[customermain.internalidnumber,equalto,{id}]
 Example 2:[entityid,anyof,{id}]
 Example 3:[formulanumeric: {internalid},equalto,{id}]
 Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.

Pie Chart

Pie charts is a good choice when visualizing for example market share per company.



1. Configure the search

Number of searches: 1

When using the line chart it is recommended to also include a **reference search**. The reference search contains all the x-values which should be displayed in the chart.

Make sure the saved search is public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The search must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Status	Group				Status			
Quantity	Count				Quantity		Quantity	
Amount								
Customer								
Sales Rep								
Date								

In this DEMO Opportunity search: Title = Status, Value = Quantity

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts ← → List Search More

DEMO Pie Chart - Opportunities per Status

Save **Cancel** **Reset** **Screenshot** **Actions**

General

CUSTOM FORM
Alterview Pie Chart

TYPE
Pie Chart

NAME *

DEMO Pie Chart - Opportunities per Status

CHART DESCRIPTION

This is an example of Pie Chart displaying Opportunities per Status.

Value field is Quantity in this example.

The Chart uses one search: Demo Opportunities (Donut and Pie)
Data is collected from the DEMO Custom Records!

☐ INACTIVE

VALIDATION RESULT

Title

TITLE
DEMO Pie Chart - Opportunities per Status

TITLE FONTSIZE
14
☐ TITLE BOLD

TITLE ALIGN
Center

Style

LABEL FOR SUMMARY SLICE

☐ ADD SUMMARY SLICE

MAXIMUM NUMBER OF DATA
100

LABEL MAX WIDTH
250

COLOR HUE *
Chart Original Colors

COLOR LUMINOSITY *
Bright

☒ DISPLAY LEGEND
☐ DISPLAY LABELS
☒ 3D VIEW

Field	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Font Size	Font size of Chart Title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Label for summary slice	The name of the summary slice which holds the aggregated value of the remaining result rows.
Add Summary Slice	Mark the checkbox to add a summary slice. When the number of result rows in the saved search exceeds the "Maximum number of data" set in the Alterview Charts record an extra slice will be added, which holds the aggregated value of the remaining result rows.
Maximum number of data	Optionally set a maximum number of data to display in the chart. Recommended if your saved search returns too many results. Too much data in a chart will make it cluttered and is not recommended.
Label Max width	The label width is the width in pixels for both the legend and the labels. If the width is too small, all labels will be wrapped character per character and not word by word.
Color hue	The color hue of the slices.
Color Luminosity	The color luminosity of the slices.

Display Legend	Mark the checkbox to display the legend for each bar to the right of the chart.
Display Labels	Mark the checkbox to display the name of the labels for each slice.
3D-view	Mark the checkbox for 3D-effect.

3. Link the search to your chart record

From the Alterview Chart record, click on the button *New Alterview Chart Search* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.

Alterview Charts Search ← → List Search More

SEARCH
 DEMO Opportunities (Donut and Pie)

VALUE FIELD
 Quantity

VIEW
 Default View

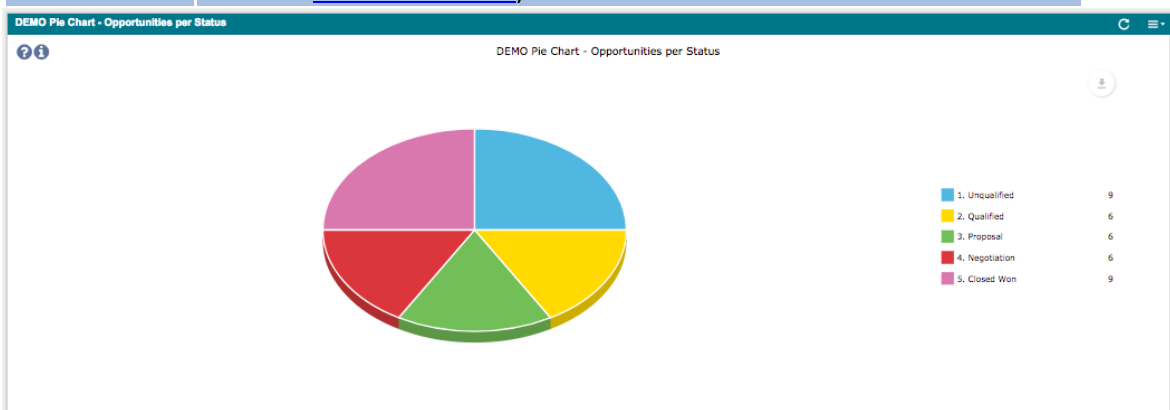
ALTERVIEW CHARTS FILTER

TITLE FIELD
 Status

CUSTOMER FILTER EXPRESSION

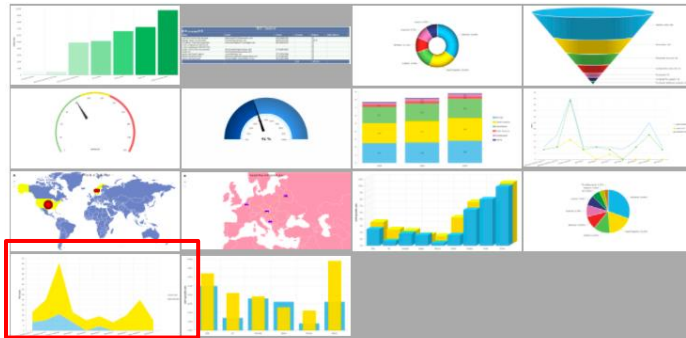
EDIT	FORMULA TYPE	FILTER EXPRESSION	FORMULA OPERATOR	FILTER EXPRESSION VALUE	FILTER EXPRESSION VALUE 2	REMOVE
No records to show.						

Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label name for the column that holds the title.
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer. Example 1:[customermain.internalidnumber,equalto,{id}] Example 2:[entityid,anyof,{id}] Example 3:[formulanumeric: {internalid},equalto,{id}] Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).



Stacked Area Chart

Stacked area charts are used to represent cumulated totals using numbers or percentages over time.



1. Configure the search

Number of searches: 1 or more

To display data in the stacked area chart, at least one saved search is needed, but more likely the chart will display data from several saved searches to compare data over time. The data can be collected from two different searches or from one single search.

When using the stacked area chart it is possible to also include a **reference search**. The reference search contains all the x-values which should be displayed in the chart.

Make sure the searches are public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The search must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Formula (Text)	Group		TO_CHAR((custrecord_demo_sales_date), 'YYYY-MM')		Year and Month			
Formula (Numeric)	Sum		ROUND((custrecord_demo_sales_amount),0)		Amount Sales		Amount Sales	
Customer					Customer			
Date					Date			
Quantity					Quantity			
Warehouse					Warehouse			

In this DEMO Sales search: Title = Year and Month, Value = Amount Sales

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Formula (Text)	Group		TO_CHAR(custrecord_demo_opportunities_date), 'YYYY-MM')		Year and Month			
Formula (Numeric)	Sum		ROUND(custrecord_demo_opportunities_amount,0)		Amount Opportunities		Amount Opportunities	
Customer					Customer			
Sales Rep					Sales Rep			
Date					Date			
Quantity					Quantity			
Status					Status			

In this DEMO Opportunities search: Title = Year and Month, Value = Amount Opportunities

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts ← → List Search More

DEMO Stacked Area Chart - Sales + Opportunities

Save **Cancel** **Reset** **Screenshot!** **Actions**

General

CUSTOM FORM
Alterview Stacked Area Chart

TYPE
Stacked Area Chart

NAME
DEMO Stacked Area Chart - Sales + Opportuni

CHART DESCRIPTION

This is an example of Stacked Area Chart displaying Sales + Opportunities over a time period.

Colour Theme: Custom Theme: Pastel Palette.

Value field is a formula on Amount rounded to 0 decimals in this example.

The Chart uses two searches:
Demo Sales (Chart)
Demo Opportunities (Chart)

☐ INACTIVE
VALIDATION RESULT

Title

TITLE
DEMO Stacked Area Chart - Sales + Opportunities

TITLE FONT SIZE
14

☒ TITLE BOLD

TITLE ALIGN
Center

Style

☒ DISPLAY LABELS
☐ DISPLAY LEGEND

MAXIMUM NUMBER OF DATA
100

COLOR HUE
Custom Theme: Pastel Palette

COLOR LUMINOSITY
Bright

☐ ROTATE GRAPH

Axis

☐ ONLY INTEGERS ON Y-AXIS.
LABEL ON Y-AXIS

LABEL ON X-AXIS

☒ FORCE VALUE AXIS TO START FROM ZERO

Field Name	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the "?" icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Title Font Size	Font size of chart title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.

Display Labels	Mark the checkbox to display the name of the labels below each value point.
Display Legend	Mark the checkbox to display the legend for each bar to the right of the chart.
Maximum number of data	Optionally set a maximum number of bars to display in the chart. Recommended if your saved search returns too many results. Too much data in a chart will make it cluttered and is not recommended.
Color Hue	The color hue of the chart.
Color Luminosity	The color luminosity of the chart.
Rotate Graph	Rotates the graph 90 degrees clockwise.
Only integers on Y-axis	Only show integers on Y-axis.
Label on Y-axis	A static label which will be centered vertically in the chart.
Label on X-axis	A static label which will be centered horizontally in the chart.
Force value to start from zero	Mark the checkbox to force the value axis to start from zero.

3. Link the search to your chart record

For the Stacked Area chart it is recommended to include at least two *Alterview Chart Search* records. It is possible to use the same saved search for every Alterview Chart Search record or to use different saved searches for each Alterview Chart Search record.

New Alterview Charts Search						
EDIT	ORDER	SEARCH *	VALUE FIELD	TITLE FIELD	IMAGE FIELD	REFERENCE SEARCH
Edit	2	DEMO Opportunities (Chart)	Amount Opportunities	Year and Month		No
Edit	1	DEMO Sales (Chart)	Amount Sales	Year and Month		Yes

In this example two different saved searches has been used to display data in the chart.

From the Alterview Chart record, click on the button *New Alterview Chart Serarch* to create a new Alterview Chart Search child record to you chart. Enter information in the fields as described below. To display several values in one stacked area, the values are grouped into the same area/bar by using the same Title field for each Alterview Charts Search record.

Please note that *Alterview Charts Filter* is only needed when using *Alterview Navigator* to filter the chart.

Alterview Charts Search

Save

Cancel

Reset

Screenshot

Actions

SEARCH

DEMO Sales (Chart)

VALUE FIELD

Amount Sales

TITLE FIELD

Year and Month

ORDER

1

VIEW

Default View

ALTERVIEW CHARTS FILTER

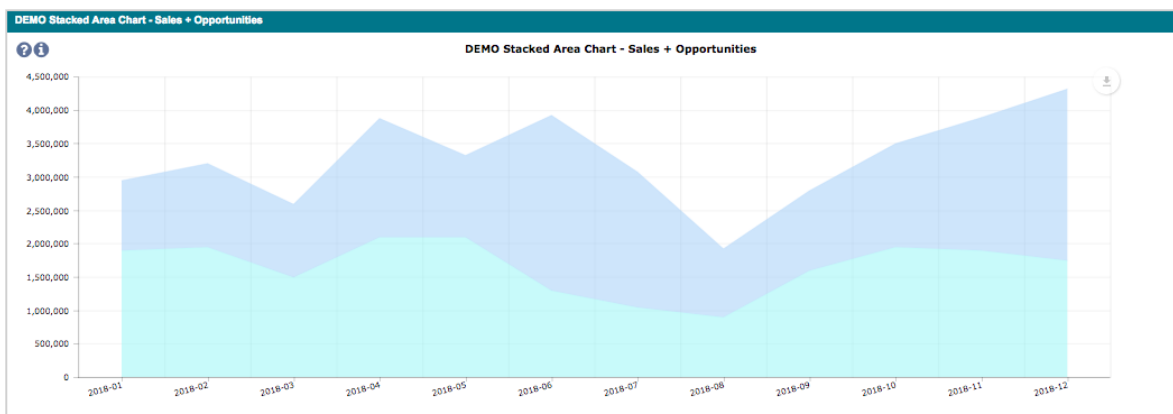
REFERENCE SEARCH

SHOW MAIN SEARCH

CUSTOMER FILTER EXPRESSION

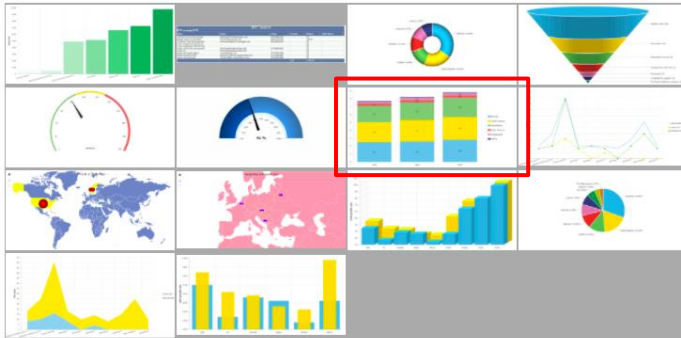
New Alterview Charts Filter						
EDIT	FORMULA TYPE	FILTER EXPRESSION	FORMULA OPERATOR	FILTER EXPRESSION VALUE	FILTER EXPRESSION VALUE 2	REMOVE
No records to show.						

Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label for the column that holds the relevant value for this search.
Title Field	The Custom Label for the column that holds the title.
Order	Each saved search will be layered on top of each other. The order field will control both legend and the order of how the result is layered.
Reference Search	When a maximum number of data has been set for the chart, and the different searches returns different number of results, one of the searches must be set as reference search to define which results to show and in which order.
Show main search	Mark the checkbox to display data from the reference search in the chart. If the checkbox is unmarked, the Reference Search will not show up in the chart and only work as a reference for the other searches.
Customer Filter Expression	If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer. Example 1:[customermain.internalidnumber,equalto,{id}] Example 2:[entityid,anyof,{id}] Example 3:[formulanumeric: {internalid},equalto,{id}] Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).



Stacked Bar Chart

Stacked Bar Chart are used to show how a larger category is divided into smaller categories and what the relationship of each part has on the total amount.



1. Configure the search

Number of searches: 1 or more

To display data in the stacked bar chart, at least one saved search is needed, but more likely the chart will display data from several saved searches to compare data. The data can be collected from two different searches or from one single search.

When using the stacked bar chart it is possible to also include a **reference search**. The reference search contains all the x-values which should be displayed in the chart.

Make sure the searches are public and to include a Custom Label for the fields which will be displayed in the chart. If it's a summary search the Summary label must also be defined.

The search must include a minimum of 2 columns:

1. Name (of the item/unit to be displayed in the chart)
2. Value (of the item/unit to be displayed in the chart)

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer								
Sales Rep	Group				Sales Rep			
Date								
Amount	Sum				Amount Unqualified		Amount Unqualified	
Quantity								
Status								

In this DEMO Opportunities search: Title = Sales Rep, Value = Amount Unqualified

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer								
Sales Rep	Group				Sales Rep			
Date								
Amount	Sum				Amount Qualified		Amount Qualified	
Quantity								
Status								

In this DEMO Opportunities search: Title = Sales Rep, Value = Amount Qualified

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer								
Sales Rep	Group				Sales Rep			
Date								
Amount	Sum				Amount Proposal		Amount Proposal	
Quantity								
Status								
<input type="button" value="Add"/> <input type="button" value="Cancel"/> <input type="button" value="Insert"/> <input type="button" value="Remove"/> <input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Move To Top"/> <input type="button" value="Move To Bottom"/>								

In this DEMO Opportunities search: Title = Sales Rep, Value = Amount Proposal

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer								
Sales Rep	Group				Sales Rep			
Date								
Amount	Sum				Amount Negotiation		Amount Negotiation	
Quantity								
Status								
<input type="button" value="Add"/> <input type="button" value="Cancel"/> <input type="button" value="Insert"/> <input type="button" value="Remove"/> <input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Move To Top"/> <input type="button" value="Move To Bottom"/>								

In this DEMO Opportunities search: Title = Sales Rep, Value = Amount Negotiation

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer								
Sales Rep	Group				Sales Rep			
Date								
Amount	Sum				Amount Closed Won		Amount Closed Won	
Quantity								
Status								
<input type="button" value="Add"/> <input type="button" value="Cancel"/> <input type="button" value="Insert"/> <input type="button" value="Remove"/> <input type="button" value="Move Up"/> <input type="button" value="Move Down"/> <input type="button" value="Move To Top"/> <input type="button" value="Move To Bottom"/>								

In this DEMO Opportunities search: Title = Sales Rep, Value = Amount Closed Won

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Altview Charts

[List](#) [Search](#) [More](#)

DEMO Stacked Bar - Pipeline per Sales Rep


[Save](#) [Cancel](#) [Reset](#) [Screenshot](#) [Actions](#)

General

CUSTOM FORM
Altview Stacked Bar Chart

TYPE
Stacked Bar Chart

NAME
DEMO Stacked Bar - Pipeline per Sales Rep

CHART DESCRIPTION
 Arial
This is an example of Stacked Bar Chart displaying Pipeline per Sales Rep.
Value field is Amount in this example.
The Chart uses five searches:
Demo Opportunities Unqualified (Stacked Bar)
Demo Opportunities Qualified (Stacked Bar)
Demo Opportunities Proposal (Stacked Bar)
Demo Opportunities Negotiation (Stacked Bar)
Demo Opportunities Closed Won (Stacked Bar)
Data is collected from the DEMO Custom Records!

☐ INACTIVE

VALIDATION RESULT

Title

TITLE
DEMO Stacked Bar - Pipeline per Sales Rep

TITLE FONT SIZE
14

☒ TITLE BOLD

TITLE ALIGN
Center

Style

☒ DISPLAY LABELS

☒ DISPLAY LEGEND

MAXIMUM NUMBER OF DATA
100

☐ ADD SUMMARY SLICE

NEW STACK AFTER
0

☐ ROTATE GRAPH

COLOR HUE
Chart Original Colors

COLOR LUMINOSITY
Bright

☒ 3D VIEW

Axis


☐ ONLY INTEGERS ON Y-AXIS.

LABEL ON Y-AXIS

LABEL ON X-AXIS.

☒ FORCE VALUE AXIS TO START FROM ZERO

Field Name	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the “?” icon in the upper left corner of the chart.
Title	The chart title will be displayed centered above the graph. When combining Altview Charts with Altview Navigator extra info is available (please refer to Chart Title Using Altview Navigator).
Title Font Size	Font size of Chart Title in pixels.
Title Bold	Mark checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Display Labels	Mark the checkbox to display the name of the labels below each value point.
Display Legend	Mark the checkbox to display the legend for each bar to the right of the chart.
Maximum number of data	Optionally set a maximum number of bars to display in the chart. Recommended if your saved search returns too many results. Too much data in a chart will make it cluttered and is not recommended.
Add Summary Slice	Mark the checkbox to add a summary bar. When the number of result rows in the saved search exceeds the "Maximum number of data" set in the Altview Charts record an extra bar will be added, which holds the aggregated value of the remaining result rows.

New Stack after	<p>Create new stack after x number of bars. With this feature it is possible to control if the stack should be cumulative or side by side.</p> <p>New Stack = 0 New Stack=1</p> 
Rotate graph	Rotates the graph 90 degrees clockwise.
Color Hue	The color hue of the chart.
Color Luminosity	The color luminosity of the chart.
3D view	Mark the checkbox for 3D-effect.
Only integers on Y-axis	Only show integers on Y-axis.
Label on Y-axis	A static label which will be centered vertically in the chart.
Label on X-axis	A static label which will be centered horizontally in the chart.
Force value to start from zero	Mark the checkbox to force the value axis to start from zero.

3. Link the search to your chart record

For the Stacked Bar chart it is recommended to include at least two *Altview Chart Search* records. It is possible to use the same saved search for every Altview Chart Search record or to use different saved searches for each Altview Chart Search record.

New Altview Charts Search		Attach	Customize View				
EDIT	ORDER	SEARCH #	VALUE FIELD	TITLE FIELD	IMAGE FIELD	REFERENCE SEARCH	REMOVE
Edit	5	DEMO Opportunities Closed Won (Stacked Bar)	Amount Closed Won	Sales Rep		No	Remove
Edit	4	DEMO Opportunities Negotiation (Stacked Bar)	Amount Negotiation	Sales Rep		No	Remove
Edit	3	DEMO Opportunities Proposal (Stacked Bar)	Amount Proposal	Sales Rep		No	Remove
Edit	2	DEMO Opportunities Qualified (Stacked Bar)	Amount Qualified	Sales Rep		No	Remove
Edit	1	DEMO Opportunities Unqualified (Stacked Bar)	Amount Unqualified	Sales Rep		Yes	Remove

In this example five saved search has been used to display data in the chart.

From the Altview Chart record, click on the button *New Altview Chart Search* to create a new Altview Chart Search child record to you chart. Enter information in the fields as described below. To display several values in one stacked bar, the values are grouped into the same bar by using the same Title field for each Altview Charts Search record.

Please note that *Altview Charts Filter* is only needed when using *Altview Navigator* to filter the chart.

Alterview Charts Search

SEARCH

DEMO Opportunities Unqualified (Stacked Bar)

VALUE FIELD

Amount Unqualified

TITLE FIELD

Sales Rep

ORDER

1

☒ REFERENCE SEARCH
☒ SHOW MAIN SEARCH

CUSTOMER FILTER EXPRESSION

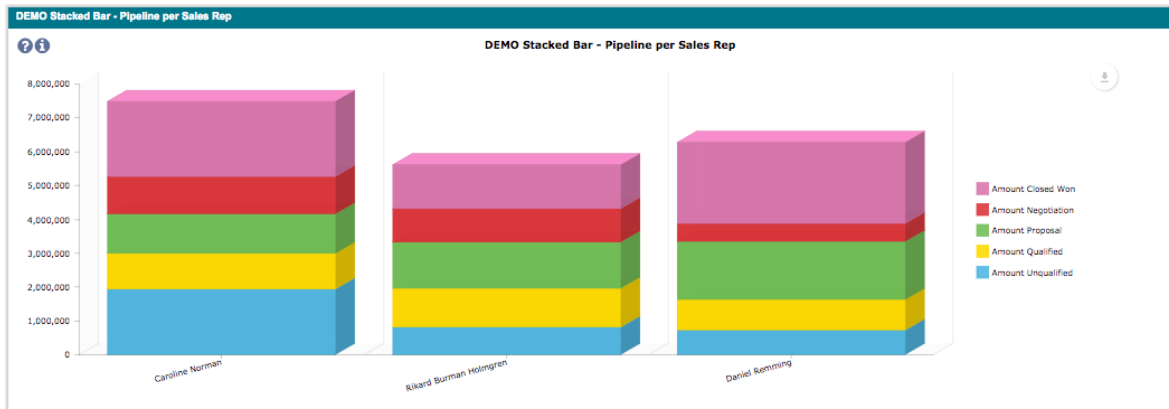
VIEW

Default View

ALTERVIEW CHARTS FILTER

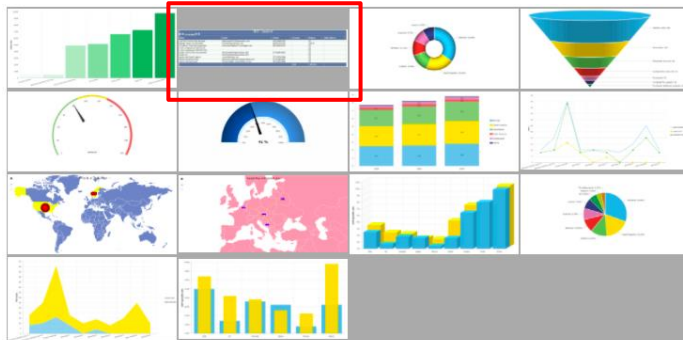
EDIT	FORMULA TYPE	FILTER EXPRESSION	FORMULA OPERATOR	FILTER EXPRESSION VALUE	FILTER EXPRESSION VALUE 2	REMOVE
No records to show.						

Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label name for the column that holds the relevant value for this search
Title Field	The Custom Label for the column that holds the relevant value for this search.
Order	The Order field controls the layout of the legend.
Reference Search	When a maximum number of data has been set for the chart, and the different searches returns different number of results, one of the searches must be set as reference search to define which results to show and in which order.
Show main search	Mark the checkbox to display data from the reference search in the chart. If the checkbox is unmarked, the Reference Search will not show up in the chart and only work as a reference for the other searches.
Customer Filter Expression	<p>If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.</p> <p>Example 1:[customermain.internalidnumber,equalto,{id}]</p> <p>Example 2:[entityid,anyof,{id}]</p> <p>Example 3:[formulanumeric: {internalid},equalto,{id}]</p> <p>Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.</p>
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).



Data Grid Chart

The Data Grid is a chart that makes it possible to combine several searches and present the result as a list. The common link between the searches is a key value that the grid uses to match rows from several searches. One search acts as a main search and contains most of the columns that is visible. It is also possible to display search results from only one search.



1. Configure the search

Number of searches: 1 or more

To display data in the data grid, at least one saved search is needed, but more likely the chart will display data from several saved searches to combine data from several sources. One of the saved searches will act as the main search and defines the result rows to be displayed in the data grid.

Make sure the searches are public and to include a Custom Label for the result fields. If it's a summary search the Summary label must also be defined.

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL
Internal ID					InternalID
Name					Company
Email					Email
Phone					Phone
Primary Contact					PrimaryContact
Sales Rep					SalesRep
Sales Rep : Email					SalesRepEmail
Address					Address

In this DEMO Customer search: The main search contains eight result fields with Custom Labels

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
Formula (Text)	Group		{name}		Company		
Amount	Sum				InvoicedAmount		InvoicedAmount
Customer (Main Line) : Internal ID	Minimum				customerid		customerid

In this DEMO Transaction search: The second search contains the sum of invoiced amount per customer

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below. The first image explains the different parts of the data grid.

Pagination Global search Column search

1 to 8 (8)				
name	amount	balance	Extra value	
Anne	177.00	1.00	177	
Caroline	183.00	32	16.00	383
Cheyenne	176.00	18	1.00	176
Christine	164.00	99	1.00	164

General

CUSTOM FORM
Alterview DataGrid

TYPE
DataGrid

NAME *
Alterview Charts - Customer Details (data grid) 1

CHART DESCRIPTION
Arial

INACTIVE

VALIDATION RESULT

Title

TITLE FONTSIZE
12 2

TITLE
Alterview Customer Details 4

TITLE ALIGN
Left 5

TITLE BOLD 3

Style

DATAGRID HEADER TEXT COLOR 6

DATAGRID COLUMN SEARCH 7

DATAGRID HEADER BACKGROUND COLOR 9

DATAGRID ODD COLOR 10

DATAGRID GLOBAL SEARCH 11

PAGE SIZE *
50 12

USE STANDARD THEME 8

	Field	Description
1	Name	The name should be descriptive and give the user a hint of what is displayed in the dashboard portlet.
2	Title font size	Font size of Chart Title in pixels.
3	Title bold	Mark the checkbox to make the Chart Title bold.
4	Title	The chart title which will be displayed in the header of the table.
5	Title align	The horizontal alignment of the title.
6	Data grid header text color	Select the color of the data grid header text.
7	Data grid column search	Mark the checkbox to enable a search feature for each column that is searchable. Set the focus on appropriate column, type some text and press enter.
8	Use standard theme	Mark the checkbox to make the color theme of the data grid match the selected NetSuite color theme for the current user.
9	Data grid header background color	Manually select the color of the data grid.
10	Data grid odd color	Manually select the hover color for odd rows.
11	Data grid global search	Mark the checkbox to make the data grid searchable.
12	Page size	The number of rows on each page in the data grid.

3. Link the searches to your chart record

For the Data Grid it is common to include at least two *Alterview Chart Search* records. One of the searches is selected to be the main search and contains most information to be displayed in the data grid. Additional searches can be added to include data from several sources In the data grid.

New Alterview Charts Search						
EDIT	INTERNAL ID	SEARCH	VALUE FIELD	TITLE FIELD	ORDER	IMAGE FIELD
Edit	245	Alterview Charts - Customer Data Grid Invoices				Remove
Edit	107	Alterview Charts - Customer Data Grid				Remove

In this example two saved searches have been selected to display data in the chart.

From the Alterview Chart record, click on the button *New Alterview Chart Serarch* to create a new Alterview Chart Search child record to you chart, starting with one of the additional searches (not the main search).

☐ INACTIVE
SEARCH
Alterview Charts - Customer Data Grid Invoices
PARENT
Alterview Charts - Customer Details (data grid)

ACCESSSED AS
InvoicedAmount
☐ MAIN SEARCH
CUSTOMER FILTER EXPRESSION

Select the relevant saved search and enter a descriptive name for the search in the field *Accesssed As* (with no spaces) and click *Save*.

Altview Charts Search ← → List Search Customize More

☐ INACTIVE

SEARCH
Altview Charts - Customer Data Grid Invoices

PARENT
Altview Charts - Customer Details (data grid)

ACCESSSED AS
InvoicedAmount

☐ MAIN SEARCH

CUSTOMER FILTER EXPRESSION

Columns **Filter Mapping** **Notes**

VIEW
Default View

ALTERVIEW CHART COLUMN

EDIT	NAME	ORDER #	LABEL	SEARCHABLE	SUMMARY FIELD	VIRTUAL FIELD	KEY COLUMN	COLORING	DISPLAY TEXTUAL VALUE	URL	DISPLAY IN GRID
Edit	Company	0	Company	No			No	No		Yes	N
Edit	InvoicedAmount	1	InvoicedAmount	No			No	No		Yes	N
Edit	customerid	2	customerid	No			Yes	No		Yes	N

Click on the button *Regenerate Columns* and the chart application will create a list of columns based on the search. Make sure one of the columns is marked as Key Column (this column will connect the searches together). If one of the result columns from the saved search is named 'key' the application will automatically suggest that column to be the key column.

☐ INACTIVE

SEARCH
Altview Charts - Customer Data Grid

PARENT
Altview Charts - Customer Details (data grid)

ACCESSSED AS
CustomerDetails

☒ MAIN SEARCH

CUSTOMER FILTER EXPRESSION

Repeat the steps for the main search, but this time mark the checkbox *Main search*.

Altview Charts Search ← → List Search Customize More

☐ INACTIVE

SEARCH
Altview Charts - Customer Data Grid

PARENT
Altview Charts - Customer Details (data grid)

ACCESSSED AS
CustomerDetails

☒ MAIN SEARCH

CUSTOMER FILTER EXPRESSION

Columns **Filter Mapping** **Notes**

VIEW
Default View

ALTERVIEW CHART COLUMN

EDIT	NAME	ORDER #	LABEL	SEARCHABLE	SUMMARY FIELD	VIRTUAL FIELD	KEY COLUMN	COLORING	DISPLAY TEXTUAL VALL
Edit	InternalID	0	InternalID	No			Yes	No	
Edit	Company	1	Company	No			No	No	
Edit	Email	2	Email	No			No	No	
Edit	Phone	3	Phone	No			No	No	
Edit	PrimaryContact	4	PrimaryContact	No			No	Yes	
Edit	SalesRep	5	SalesRep	No			No	Yes	
Edit	SalesRepEmail	6	SalesRepEmail	No			No	No	
Edit	Address	7	Address	No			No	No	

Click on the button *Regenerate Columns* and the chart application will create a list of columns based on the search. Make sure the appropriate column is marked as Key Column (this column will connect the searches together).

4. Include columns from the additional searches (Virtual columns)

From the main search record, click on *New Altview Chart Column* to create an additional column to display in the data grid.

Altview Chart Column

InvoicedAmount

NAME

☐ INACTIVE

PARENT

ORDER

LABEL

☐ SEARCHABLE

SUMMARY FIELD

VIRTUAL FIELD

☐ KEY COLUMN

COLORING

☐ DISPLAY TEXTUAL VALUE

URL

☒ DISPLAY IN GRID

☒ APPLY NUMBER FORMAT

Give the column a name and order, as well as a label (to be displayed in the data grid column). Next, it's time to set the content of the virtual field.

The virtual field is the most complicated field in the data grid and should be seen as a javascript function to be evaluated for each row. The syntax for accessing a value from any of the additional searches linked to the data grid is:

row.[accessedas].[column name].[text/value]

accessedas = The field "Accessed As" from selected Altview Search Record (additional search)

column name = The name of the Altview Chart Column for the selected column.

text/value = In most cases the *value* from a particular field is selected to be displayed.

However, List/Record fields always have two values, a textual value (text) and a id (value). Therefore, it is possible to select which of the two to display in the data grid, the *text* or the *value*. Again, the *value* is the most common choice.

VIRTUAL FIELD

In this example, the value from the row *InvoicedAmount* in the additional search has been selected to be displayed in the data grid. The additional search is accessed as *InvoicedAmount*, giving the syntax: *row.InvoicedAmount.InvoicedAmount.value*.

Common functions to be used in the virtual field include:

parseFloat – convert string to a float number

parseInt – convert string to integer

number.toFixed(n) – convert a number to a string with n decimals

Any type of javascript function can be used as long as the result is one value.

5. Make the row clickable

As stated before, List/Record fields (for example the name field of a transaction) always have two values, a textual value (text) and an internalid id (value). Therefore, it is possible to make a List/Record field clickable in the data grid.

Alterview Chart Column

PrimaryContact

[Edit](#) [Back](#) [Screenshot!](#) [Print](#) [Actions](#)

NAME
PrimaryContact
☐ INACTIVE
PARENT
107
ORDER
4
LABEL
PrimaryContact

☐ SEARCHABLE
SUMMARY FIELD
VIRTUAL FIELD
☐ KEY COLUMN

COLORING

☒ DISPLAY TEXTUAL VALUE
URL
/app/common/entity/contact.nl?id={row.CustomerDetails.PrimaryContact.value}
☒ DISPLAY IN GRID
☐ APPLY NUMBER FORMAT

Check the field "Display Textual value" if you would like to show the textual value for a List/Record field in the data grid (when regenerating columns, the data grid will always set the checkbox true for all List/Record fields).

In the URL field, enter the URL for the relevant List/Record (navigate to a record of that type in NetSuite and copy the part of the URL from /app/common....) in this case the Contact record .

To make the URL dynamic, exchange the id number in the URL to a value from any row by the syntax {row.[accessed as].[name of field].value}

In this case we would like to dynamically enter the internal id (value) for the Primary Contact from the main search accessed as "CustomerDetails" with its value, so the complete URL will be:

/app/common/entity/ccontact.nl?id={row.CustomerDetails.PrimaryContact.value}

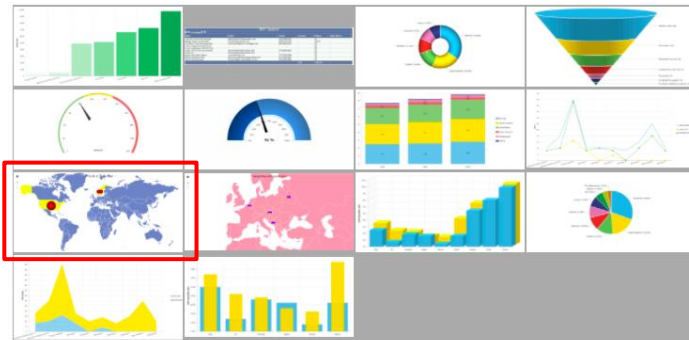
☒ DISPLAY TEXTUAL VALUE
URL
/app/common/entity/contact.nl?id={row.CustomerDetails.PrimaryContact.value}

Alterview Charts - Customer Details (data grid)								
Alterview Customer Details								
Alterview Customer Details								
InternalID	Company	Email	Phone	PrimaryContact	SalesRep	SalesRepEmail	Address	Invoiced Amount
5	Lars Svensson Swe	info@mail.se	+46707202021	Lars Svensson	Caroline Norman	caroline.norman@alterview.se	Anonymous Customer Swe Comp (new parent) Solna torg 3 Stockholm EMEA 17145 Sweden	
109	New Prospect Inc.1	rbh@alterview.se		Sven Svensson	Rikard Burman Holmgren	rbh@alterview.se		39,600
78	Lead 3	16@kalle.com		Svenne Banan	Rikard Burman Holmgren	rbh@alterview.se		
73	Test christoffer	test@mail.se	081234567	Test Contact	Pär Burman	per.burman@alterview.se		20,262

The Primary Contact as well as the Company name is clickable and will redirect the user to the relevant record. The Invoiced Amount is collected from the additional search and displayed in the data grid via a virtual column.

Map with Bubbles

The Map with bubbles chart makes it possible to combine several searches and present the data on a map, for example sales per customer. The size of the bubbles can be set to reflect the data. It is also possible to display search results from only one search.



1. Configure the search

Number of searches: 1 or more

To display data in the map with bubbles chart, at least one saved search is needed. To display data from multiple sources on the map, several saved searches can be used.

Make sure the searches are public and to include a Custom Label for the result fields. If it's a summary search the Summary label must also be defined.

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
Customer : Internal ID	Group				CustomerID		
Customer	Group				Customer		
Sales Rep					SalesRep		
Date					Date		
Amount	Sum				SalesAmount		SalesAmount
Quantity	Sum				SalesQuantity		SalesQuantity
Customer : Zip	Group				CustomerZip		
Customer : Longitude	Group				CustomerLongitude		
Customer : Latitude	Group				CustomerLatitude		

In this DEMO Sales search: The search contains longitude, latitude and sales amount per customer

2. Create the chart record

After the search is created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts

[←](#) [→](#) [List](#) [Search](#)

DEMO Total Sales per Customer (map w bubbles)

[Edit](#) [Back](#) [Screenshot!](#) [Print](#) [Actions](#)

General		
TYPE Map with Bubbles	CHART DESCRIPTION	
NAME DEMO Total Sales per Customer (map w bubbles)	<input type="checkbox"/> INACTIVE	
VALIDATION RESULT		
Title		
TITLE DEMO Total Sales per Customer	<input checked="" type="checkbox"/> TITLE BOLD	
TITLE FONTSIZE 14	TITLE ALIGN Center	
Style		
MAP REGION Usa 2 (High)	MAP PROJECTION Mercator	MAP MAX BULLET SIZE 50
MAP ZOOM LEVEL	COLOR #DFE8F0	<input checked="" type="checkbox"/> BALLOON TEXT
MAP ZOOM LONGITUDE	LISTED MAP COLOR	BALLOON TEXT FORMAT [[title]]: [[value]]
MAP ZOOM LATITUDE		

Field	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the portlet
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the “?” icon in the upper left corner of the chart.
Title	The chart title will be displayed above the chart. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Title Font size	Font size of chart title in pixels.
Title Bold	Mark the checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Map Region	Select the background map area from the list provided.
Map Zoom Level	Zoom level for the background map, select a value from 1 to 10 (optional).
Map Zoom Longitude	The background map will be centered on this longitude (optional).
Map Zoom Latitude	The background map will be centered on this latitude (optional).
Map Projection	Select the appearance of the map from the list provided.
Color	The color of the background map.
Listed Map Color	Select a color to highlight the countries which appears in the search (the search must include a field for country code).
Map Max Bullet Size	Defines the max size of the bubble on the map, select a value from 3 to 100.
Balloon Text	Mark the checkbox to display label text when hovering over bubble.
Balloon Text Format	Enter the text format for the label, including dynamic text values (ex. [[title]]).

3. Link the searches to the chart

Alterview Charts Search ← → List Search More

General Information

SEARCH

Column Mapping

VALUE FIELD <input type="text" value="SalesAmount"/>	LATITUDE <input type="text" value="CustomerLatitude"/>
TITLE FIELD <input type="text" value="Customer"/>	COUNTRY CODE <input type="text"/>
LONGITUDE <input type="text" value="CustomerLongitude"/>	COLOR <input type="text"/>

Bubble Information

BUBBLE COLOR ☐ DISPLAY TITLE

CUSTOMER FILTER EXPRESSION

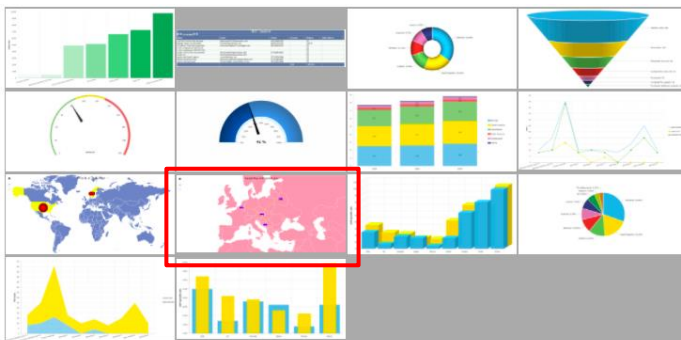
VIEW ALTerview CHARTS FILTER

EDIT	FORMULA TYPE	FILTER EXPRESSION	FORMULA OPERATOR	FILTER EXPRESSION VALUE	FILTER EXPRESSION VALUE 2	REMOVE
No records to show.						

Field	Description
Search	The name of the search (make sure the search is public).
Value Field	The Custom Label name for the column that holds the relevant value data in the search.
Title Field	The Custom Label name for the column that holds the relevant title data in the search.
Longitude	The Custom Label name for the column that holds the relevant longitude data for the bubble in the search.
Latitude	The Custom Label name for the column that holds the relevant latitude data for the bubble in the search.
Country Code	The Custom Label name for the column that holds the relevant country code data for this search.
Color	The custom Label name for the column that holds the relevant color for the bubble in the search.
Bubble Color	Define the color of the bubbles, if not defined via the saved search.
Display Title	Mark checkbox to display chart title.
Customer Filter Expression	<p>If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.</p> <p>Example 1:[customermain.internalidnumber,equalto,{id}]</p> <p>Example 2:[entityid,anyof,{id}]</p> <p>Example 3:[formulanumeric: {internalid},equalto,{id}]</p> <p>Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.</p>
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).

Map with Curved Lines

The Map with curved lines chart makes it possible to combine several searches and present the data on a map, for example sales amount from warehouse to customer. The lines on the map chart can be set to reflect the data. It is also possible to display search results from only one search.



1. Configure the search

Number of searches: 1 or more

To display data in the map with curved lines chart, at least one saved search is needed, but more likely several saved searches are defined to display data from multiple sources on the map, including start and end points.

Make sure the searches are public and to include a Custom Label for the result fields. If it's a summary search the Summary label must also be defined.

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Customer : Internal ID	Group				CustomerID			
Formula (Text)	Group		{custrecord_demo_sales_customer} "- {custrecord_demo_sales_warehouse}		Customer			
Sales Rep					SalesRep			
Date					Date			
Amount	Sum				SalesAmount		SalesAmount	
Quantity	Sum				SalesQuantity		SalesQuantity	
Customer : Zip	Group				CustomerZip			
Customer : Longitude	Group				CustomerLongitude			
Customer : Latitude	Group				CustomerLatitude			
Warehouse	Group				Warehouse			
Warehouse : Longitude	Group				WarehouseLongitude			
Warehouse : Latitude	Group				WarehouseLatitude			
Customer	Group				Customer (group)			

In this DEMO Sales search: The search contains longitude, latitude for start and end point as well as sales amount per customer. The search include all data needed to display a line on the map.

2. Create the chart record

After the searches are created and tested a new Alterview Charts record must be created.

Navigate to Administration → Alterview Charts Setup → Charts → New to create a new Alterview Charts record. Enter information in the fields as described below.

Alterview Charts ← → List Search

DEMO Total Sales per Customer (map w curved lines)

[Edit](#) [Back](#) [Screenshot!](#) [Print](#) [Actions](#)

General

TYPE Map with Curved Lines	CHART DESCRIPTION
NAME DEMO Total Sales per Customer (map w curved lines)	<input type="checkbox"/> INACTIVE VALIDATION RESULT

Title

TITLE DEMO Map w Curved Lines	<input checked="" type="checkbox"/> TITLE BOLD
TITLE FONTSIZE 14	TITLE ALIGN Center

Style

MAP REGION Usa 2 (High)	MAP PROJECTION Mercator
MAP ZOOM LEVEL 1	COLOR #DFE8F0
MAP ZOOM LONGITUDE	LISTED MAP COLOR
MAP ZOOM LATITUDE	

Field	Description
Name	The name should be descriptive and give the user a hint of what is displayed in the portlet
Chart Description	An extra field where you could add extra information about the chart. The description can be accessed from the dashboard portlet by hovering over the “?” icon in the upper left corner of the chart.
Title	The chart title will be displayed above the chart. When combining Alterview Charts with Alterview Navigator extra info is available (please refer to Chart Title Using Alterview Navigator).
Title Font size	Font size of chart title in pixels.
Title Bold	Mark the checkbox to make the chart title bold.
Title Align	Select the alignment of the chart title.
Map Region	Select the background map area from the list provided.
Map Zoom Level	Zoom level for the background map, select a value from 1 to 10 (optional).
Map Zoom Longitude	The background map will be centered on this longitude (optional).
Map Zoom Latitude	The background map will be centered on this latitude (optional).
Map Projection	Select the appearance of the map from the list provided.
Color	The color of the background map.
Listed Map Color	Select a color to highlight the countries which appears in the search (the search must include a field for country code).

3. Link the searches to the chart

When using the Map with curved lines chart the search can be of two types, either to display lines on the map ("Is Line Search") or to display start/end points on the map.

At least one search must be defined to display the lines on the map. For each line search the *Alterview Charts Search* record is marked as "Is Line Search".

Alterview Charts Search ← → List Search More

Save **Cancel** **Reset** **Screenshot!** **Actions**

General Information

SEARCH ☒ IS LINE SEARCH

DEMO Total Sales from Warehouse to Cust

Column Mapping

VALUE FIELD COUNTRY CODE ☐ DISPLAY TITLE

TITLE FIELD LINE COLOR FIELD TO LONGITUDE FIELD

LONGITUDE LINE THICKNESS TO LATITUDE FIELD

LATITUDE

Line Information

LINE ARC LINE ALPHA ARROW TYPE

LINE COLOR LINE DASH LENGTH LINE THICKNESS

CUSTOMER FILTER EXPRESSION

VIEW ALTERVIEW CHARTS FILTER

New Alterview Charts Filter **Attach** **Customize View**

EDIT	FORMULA TYPE	FILTER EXPRESSION	FORMULA OPERATOR	FILTER EXPRESSION VALUE	FILTER EXPRESSION VALUE 2	REMOVE
No records to show.						

Field	Description
Search	The name of the search (make sure the search is public).
Is Line Search	Mark the checkbox if the search holds the data for the lines on the map.
Value Field	The Custom Label name for the column that holds the relevant value data in the search.
Title Field	The Custom Label name for the column that holds the relevant title data in the search.
Longitude	The Custom Label name for the column that holds the relevant longitude data for the start point in the search.
Latitude	The Custom Label name for the column that holds the relevant latitude data for the start in the search.
Country Code	The Custom Label name for the column that holds the relevant country code data in the search.
Line Color Field	The custom Label name for the column that holds the relevant color data for the line in the search.
Line Thickness	The custom Label name for the column that holds the relevant thickness in pixels for the line in the search. The line thickness can also be set to represent data by using a formula field (a thicker line could for example represent a higher amount or quantity).
Display Title	Mark checkbox to display chart title.

To Longitude Field	The Custom Label name for the column that holds the relevant longitude data for the end point in the search.
To Latitude Field	The Custom Label name for the column that holds the relevant latitude data for the end in the search.
Line Arc	Enter a value between -1 to 1 to curve the line.
Line Color	Define the color of the line, if not defined via the saved search.
Line Alpha	Define the opacity of the line between 0-1.
Line Dash Length	Enter the line dash length (0 means the line is not dashed).
Arrow Type	Select the position of the arrow.
Line Thickness	Set the line thickness in pixels, if not defined via the saved search.
Customer Filter Expression	<p>If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.</p> <p>Example 1:[customermain.internalidnumber,equalto,{id}]</p> <p>Example 2:[entityid,anyof,{id}]</p> <p>Example 3:[formulanumeric: {internalid},equalto,{id}]</p> <p>Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.</p>
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).

To add icons for start or end points of the lines on the map, add another *Alterview Charts Search* record, where the checkbox “Is Line Search” is unmarked.

Alterview Charts Search ← → List Search More

General Information

SEARCH: DEMO Customer List (Map w Curved Lines) ☐ IS LINE SEARCH

Column Mapping

VALUE FIELD: List of Customers
 TITLE FIELD: List of Customers
 LONGITUDE: Customer Longitude
 LATITUDE: Customer Latitude
 COUNTRY CODE:
 COLOR:
☐ DISPLAY TITLE
 ICON SCALE FIELD:

Image Information

ICON: House ☐ ICON COLOR: ☐ ICON SCALE:

CUSTOMER FILTER EXPRESSION:

VIEW: Default View ☐ ALTERVIEW CHARTS FILTER

EDIT	FORMULA TYPE	FILTER EXPRESSION	FORMULA OPERATOR	FILTER EXPRESSION VALUE	FILTER EXPRESSION VALUE 2	REMOVE
No records to show.						

Field	Description
Search	The name of the search (make sure the search is public).

Is Line Search	Unmark checkbox when the search should mark start or end point on the map (will not create a line on the map).
Value Field	The Custom Label name for the column that holds the relevant value data in the search.
Title Field	The Custom Label name for the column that holds the relevant title data in the search.
Longitude	The Custom Label name for the column that holds the relevant longitude data for the start or end point in the search.
Latitude	The Custom Label name for the column that holds the relevant latitude data for the start or end in the search.
Country Code	The Custom Label name for the column that holds the relevant country code data in the search.
Color	The custom Label name for the column that holds the relevant color for the start/end point icon in the search.
Display Title	Mark checkbox to display chart title.
Icon Scale Field	The custom Label name for the column that holds the relevant size in pixels for the start or end point icon in the search. The icon size can also be set to represent data by using a formula field (a larger icon could for example represent a higher amount or quantity).
Icon	Select icon to display on the map, indicating start or end point.
Icon Color	Define the color of the icon, if not defined via the saved search.
Icon Scale	Set the size of the start/end point icon in pixels, if not defined via the saved search.
Customer Filter Expression	<p>If the chart is going to be used in a customer dashboard or on a tab on the customer record, set the expression that will be used to filtering out the customer.</p> <p>Example 1:[customermain.internalidnumber,equalto,{id}]</p> <p>Example 2:[entityid,anyof,{id}]</p> <p>Example 3:[formulanumeric: {internalid},equalto,{id}]</p> <p>Where the {id} is the internalid of current customer the {id} is substituted by the application at runtime.</p>
Alterview Charts Filter	Only needed when using <i>Alterview Navigator</i> to filter the chart (please refer to Additional Filters).

MOVE TO PRODUCTION

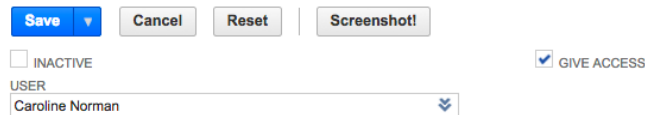
Moving a chart to production consists of three simple steps – Create a Alterview Chart User record for your selected users, add a custom portlet to your dashboard and select which chart(s) to display in the portlet.

Please note a full access user is required to use Alterview Charts.

1. Create a Alterview Chart User record

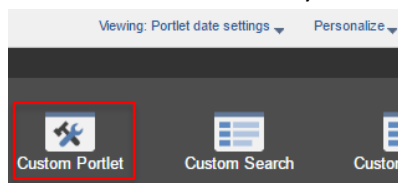
Navigate to Administration → Alterview Chart Users to create a Alterview Chart User record for the selected user. A Alterview Chart User record is required for all users who will use Alterview Charts.

Alterview Charts Admin Users



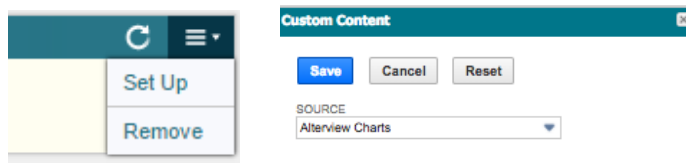
2. Dashboard Custom Portlet

Add a Custom Portlet to your selected dashboard.

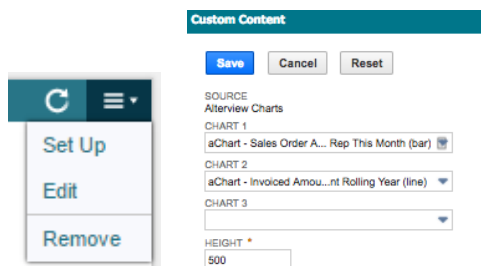


3. Setup & Edit to select chart

Set up the custom portlet and select *Alterview Chart* in the *Source* field and save.



Go back to the menu in the top right corner to edit the portlet and select which chart to display in the *Alterview Chart View* field and save.



The selected chart(s) will display in the custom portlet.