

Customize your Freestar Analytics dashboard

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We recognize that many of our customers and users have different needs, so our custom dashboards allow you to tailor a dashboard to your own unique requirements. You can create as many as you need; different people on your team may each want their own, and the system now allows for that.

So, what are custom dashboards?

A custom dashboard, much like your home dashboard, allows you to view reports and visualizations for each included widget. Unlike your home dashboard, a custom dashboard allows you to:

- customize widgets
- place widgets anywhere on your dashboard
- name the dashboard

While you can have a maximum of nine (9) widgets per dashboard, you can create as many dashboards as you need.

Custom dashboards are available to all of our customers and are automatically enabled when your account is created. If you are an existing customer and would like custom dashboards enabled, please contact us and we'll enable it for you. Any person who has access to your account will be able to both access and create dashboards in your account.

Note: Your home dashboard will always be the one that is leftmost on your dashboard menu and will display when you first log into your account. You cannot edit or delete your home dashboard.

How do I customize my dashboard?

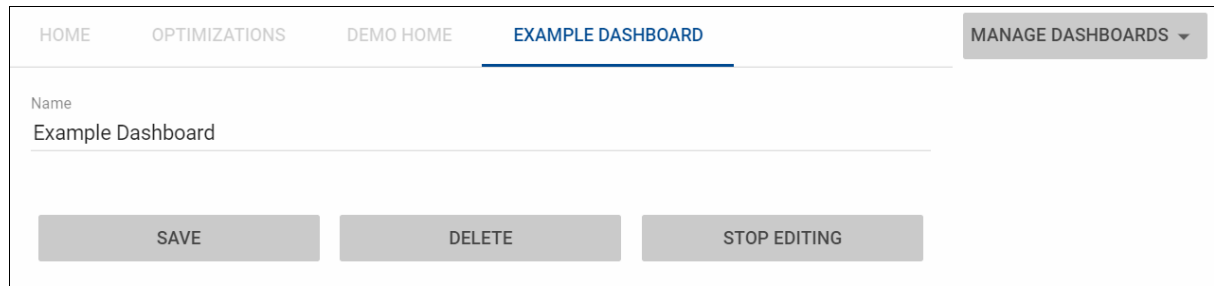
If you want to use a widget that isn't included in the nine (9) widgets available (widgets from your home dashboard), you'll first need to create a new widget in order to add it to your dashboard. See [Create a widget](#), below.

Create a dashboard


After this feature is enabled on your account, you'll see a **MANAGE DASHBOARDS** button at the top right corner of your dashboard on analytics.sortable.com.

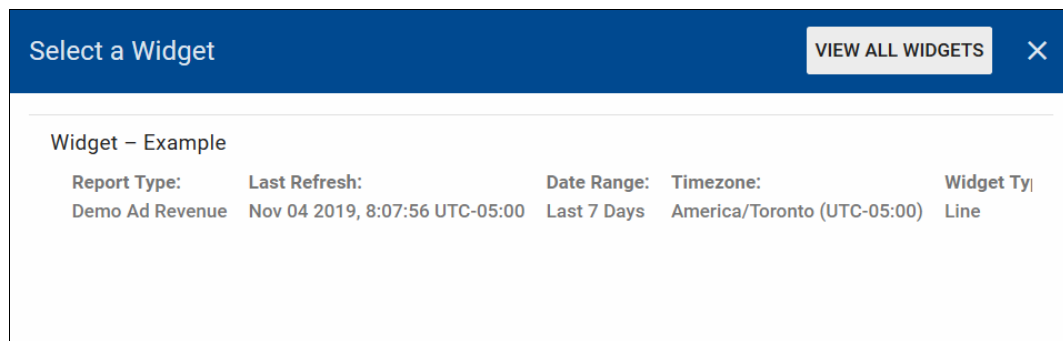
1. Click **MANAGE DASHBOARDS**.
2. Click **New Dashboard**.

3. Under Name, type the name of your dashboard. This name will display in a tab in your dashboard menu (at the top of the screen).



The screenshot shows a dashboard configuration interface. At the top, there is a navigation bar with tabs: HOME, OPTIMIZATIONS, DEMO HOME, and EXAMPLE DASHBOARD (which is currently selected). To the right of the tabs is a button labeled 'MANAGE DASHBOARDS' with a downward arrow. Below the navigation bar, there is a form with a label 'Name' and a text input field containing 'Example Dashboard'. At the bottom of the form, there are three buttons: 'SAVE', 'DELETE', and 'STOP EDITING'.

4. Click the plus sign  of one of the nine widget placements on your dashboard.
- The first screen you see contains only the widgets that you have personally created.



The screenshot shows a modal titled 'Select a Widget' with a close button (X) in the top right corner. Inside the modal, there is a table with the following data:

Widget – Example				
Report Type:	Last Refresh:	Date Range:	Timezone:	Widget Ty
Demo Ad Revenue	Nov 04 2019, 8:07:56 UTC-05:00	Last 7 Days	America/Toronto (UTC-05:00)	Line

- To view all of the widgets created by/for your account (as well as the nine widgets already on your home dashboard), click **VIEW ALL WIDGETS**.
- To add more widgets to this list, see [Create a widget](#), below.
- Click **VIEW MY WIDGETS** to see only your own widgets again.

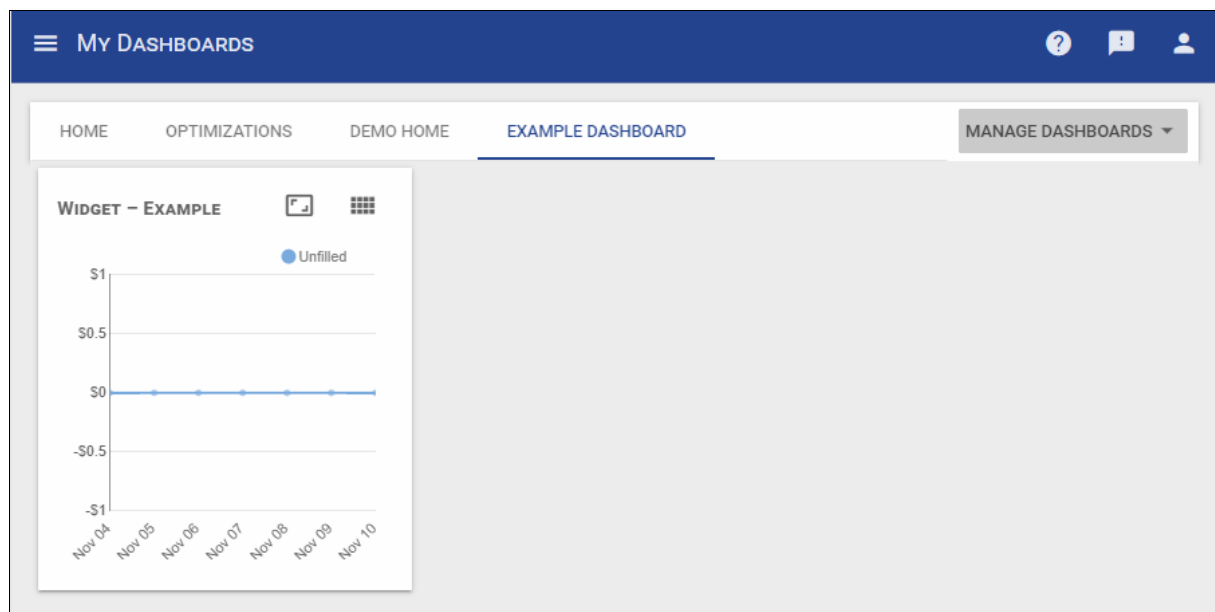
Select a Widget

VIEW MY WIDGETS

×

Widget – Example				
Report Type:	Last Refresh:	Date Range:	Timezone:	Widget
Demo Ad Revenue	Nov 04 2019, 8:07:56 UTC-05:00	Last 7 Days	America/Toronto (UTC-05:00)	Line
Top Ad Units By Revenue				
Report Type:	Last Refresh:	Date Range:	Timezone:	Widget
Demo Performance	Nov 04 2019, 8:07:42 UTC-05:00	Yesterday	America/Toronto (UTC-05:00)	Table
Page Views vs Impressions				
Report Type:	Last Refresh:	Date Range:	Timezone:	Widget
Demo Performance	Nov 04 2019, 8:07:42 UTC-05:00	Last 7 Days	America/Toronto (UTC-05:00)	Line
Revenue vs CPM				
Report Type:	Last Refresh:	Date Range:	Timezone:	Widget
Demo Performance	Nov 04 2019, 8:07:42 UTC-05:00	Last 7 Days	America/Toronto (UTC-05:00)	Line
Viewed Impressions				
Report Type:	Last Refresh:	Date Range:	Timezone:	Widget
Demo Performance	Nov 04 2019, 8:07:45 UTC-05:00	Yesterday	America/Toronto (UTC-05:00)	Donut
Fill Rate				
Report Type:	Last Refresh:	Date Range:	Timezone:	Widget
Demo Performance	Nov 04 2019, 8:07:44 UTC-05:00	Yesterday	America/Toronto (UTC-05:00)	Donut
Top Countries by Revenue				
Report Type:	Last Refresh:	Date Range:	Timezone:	Widget
Demo Performance	Nov 04 2019, 8:07:42 UTC-05:00	Yesterday	America/Toronto (UTC-05:00)	Bar

- Click to select one of the widgets from the list provided. This widget will display in the widget placement you selected in step 4.
- Repeat steps 4 and 5 until you've added all of the widgets you want. A maximum of nine (9) widgets are permitted per dashboard, but you can create as many dashboards as you need.
- Click **STOP EDITING**. Your widget(s) will display in your completed dashboard.

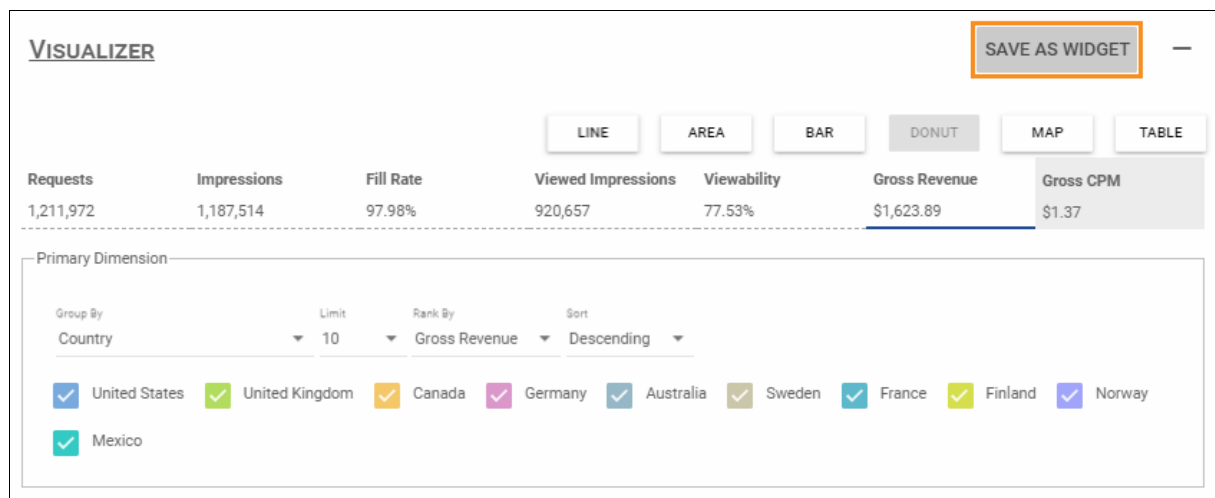


Create a widget

To create a new widget for your dashboard, you can either create a brand new report, or work from an already saved report.

Create a widget from a new report

1. In the left Navigation menu, click **Reports > Create New Report**.
2. Select a report type.
3. Fill out the settings, dimensions, and metrics that you want for your widget.
4. Click **SAVE AND RUN**. Wait for the report to run.
5. When the report displays, in the Visualizer section, make any necessary changes to the report. The widget will only display the types/form of data that you save. If you're happy with what you see, continue to step 6. If you'd like to make changes, you can:
 - Change the type of graph (selection varies on the type of report you run, but generally, you can select from bar, area, donut, map, or line graphs).
 - Change the primary dimension.
 - Change the secondary dimension.
 - Change the metrics.
6. Click **SAVE AS WIDGET**.



- In the Save as Widget dialog box, type in a name for your widget.

Save as Widget ×

Widget Name
Widget 1

The widget will be available in the Dashboards section

CREATE WIDGET



- Click **CREATE WIDGET**.

Create a widget from a saved report


- In the left Navigation menu, click **Reports > Saved Reports**.
- Select the report.
- When the report displays, in the Visualizer section, click **SAVE AS WIDGET**.
- In the Save as Widget dialog box, type in a name for your widget.
- Click **CREATE WIDGET**.

Edit a widget

To edit the information contained on a widget, you can either modify the widget's report or the visualizer. To change how a widget displays:

- From the widget, click  to open the widget's visualizer.
- Modify the widget in any way you want.
- Click  to save the widget.
- Close the visualizer. Your changes should be reflected in how the widget displays.

To change the widget:

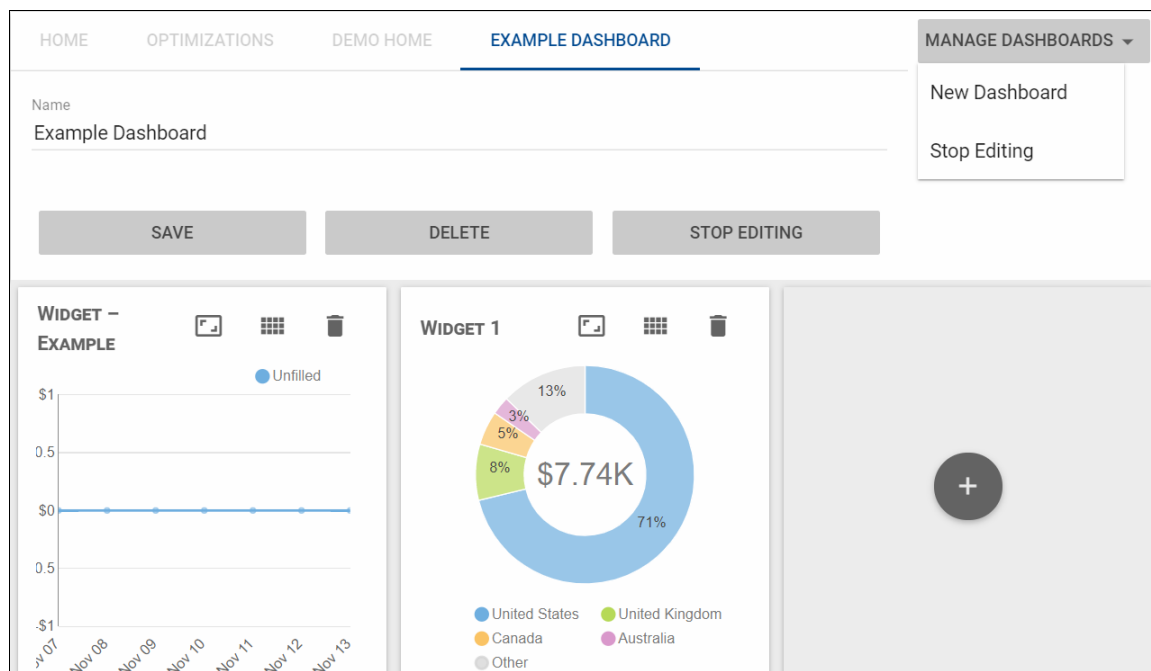
1. From the widget, click  to open the widget's report. Make note of the name of the widget.
2. Modify the widget as needed. To change the content of the report:
 - a. Click **EDIT REPORT**.
 - b. Modify as needed.
 - c. Click **SAVE**.
 - d. Click **RUN**.
 - e. Modify the widget as needed.
3. Click **SAVE AS WIDGET**.
4. Type in a name for your updated widget. This can be the same as the one you're updating (and thereby replacing), or you can use a new name to create a completely new widget.
5. Click **CREATE WIDGET**.

If the name you used in step 4 is different from the one you were using for the existing widget, add the new one to your dashboard and remove the old one (if necessary).

Edit a dashboard

You can edit any dashboard that you (or anyone else with access to your account) have created. To edit a dashboard:

1. Click the dashboard to select it.
2. Click **MANAGE DASHBOARDS**.
3. Click **Edit**.
4. Perform one or more of the following actions:
 - Add a widget (see **Create a widget**, above). The dashboard will auto-save with your changes.
 - Remove a widget (click the trash can icon at the top right corner of the widget). The dashboard will auto-save with your changes.
 - Change the dashboard name.
 - Delete the dashboard completely.



5. Click **SAVE** if you updated the dashboard name.
6. Click **STOP EDITING** when you're done editing your dashboard.

Share a dashboard

You can now share dashboards by copying and pasting the dashboard's unique URL. Please note, you must already have permission to the dashboard to be able to see it. You can share your custom dashboards within your own organization, or with your Freestar Account Manager. This is sharing in a true sense—any change that you make to the dashboard is also changed for all other people that can access it.

As an added benefit, because each URL is unique to a dashboard, when you refresh the browser page, the selected dashboard will remain in view, rather than defaulting to your home dashboard.

If you click the URL of a dashboard that you do not have access to, you will be redirected to your home dashboard.

For industry insights and information about our product offerings, [check out our blog!](#)

Want to see our products in action? For a demo, fill out a form [here](#).