

Preconfigured Dashboards & Preset Graphs

In **Castaway** we have given you two quick ways to build Dashboards. Create a dashboard from scratch or start from a **preconfigured** one.

If you decide to choose a **Blank** dashboard you can also select **Preset Widgets** from the **Preset** tab to build a custom dashboard faster.

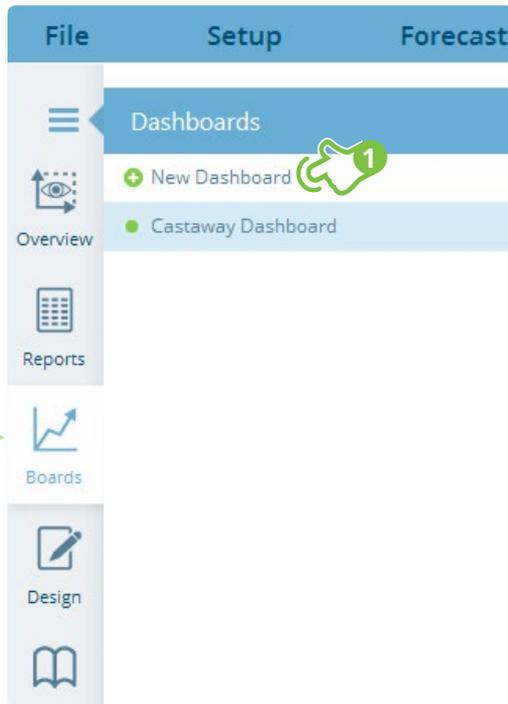
a. Add a Preconfigured Dashboard

1. Click on the **Boards** tab
2. Click **New Dashboard**
3. Select a **preconfigured** option

b. Add a Preset Graph

1. Click the plus button above the dashboard to add a widget
2. Click the **Graph** icon
3. Click the **Preset** tab
4. Select a **Preset Widgets**

Build a custom Dashboard



1. Add a new Dashboard

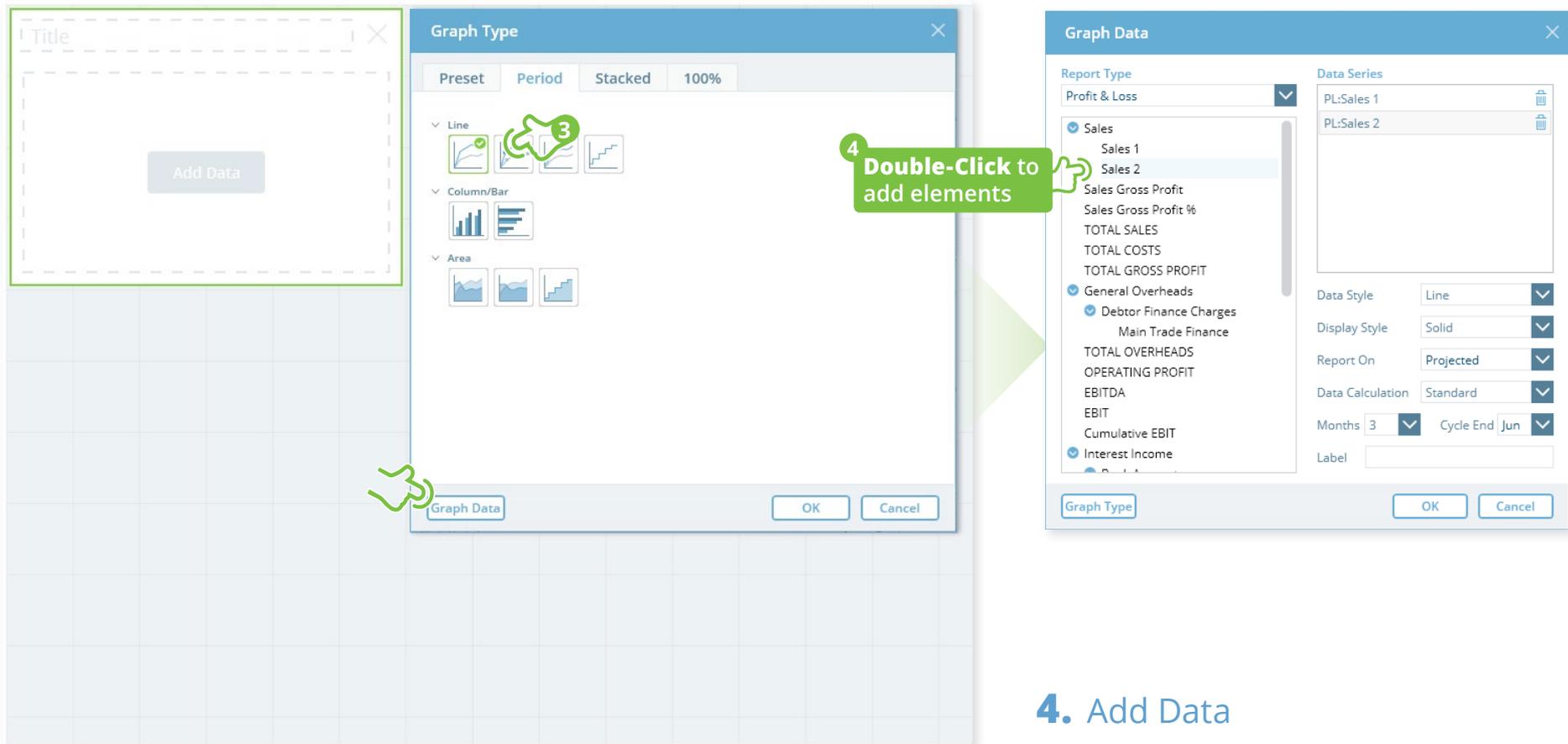
Select the **Boards** tab then click on **+ New Dashboard** to create a new dashboard.



2. Add a new Dashboard Widget

Click the **+** Button to add a **Dashboard Widget**. A new widget will appear on the dashboard. From here you can choose from one of the three widget types: **Graph**, **Image** or **Note**.

***TIP:** When adding a new a 6x4 grid space must be available on the Dashboard.



3. Graph Widget: Choose a Graph Style

Choose the display style for your graph and **click** Graph Data

4. Add Data

Choose the Report Type & **Double-click elements** to add the data lines to your graphs. **Display Style** for data can be changed for any data line by selecting the line in the **Data Series** panel and changing the **Display Style**.

Dashboard Design

- Dashboard Settings
- Graph Settings
 - Show Heading
 - Show Border
- Data
- Date Range
 - Use Slider
 - Fixed Dates
 - Relative Dates
 - Duration: 12, Offset: 0
 - Year on Year
- Appearance

Debtors vs Creditors

Jul 2017 To Jun 2020

Label Period: 1 months

Based on: Financial Year

Legend: Closing Accounts Receivable, Closing Accounts Payable



Dashboard Design

- Appearance
 - Palette: Arctic
- Graph Background
 - Blend: None
 - Colours: 1, 2
- Graph Area
 - Show Border
 - Blend: None
 - Colours: 1, 2
- Legend
 - Show Legend
 - Dock in Graph
 - Position: [Grid]
 - Size: 11, Colour: [Grey]

Using the **Dashboard Design** panel you can create attractive and unique graph styles that you can paste onto other graphs to create a consistent look for the whole **Dashboard**. The style is pasted but your Graphs retain **Graph & Data Type** settings. This allows you to quickly build great looking Dashboards.

5. Graph Widget Settings

Click the Graph area and the **Dashboard Design** tab will become active on the right. Here you can choose to show the widgets heading. Under **Date Range** you can set the graphs date display method to either **Slider**, **Fixed Dates** or **Relative Dates**. Under **Appearance** you will find all the settings needed to style your graph.

6 Edit Graph Appearance & Dashboard Layout

Design your Dashboard & Widgets using the Dashboard Design panel

Click to add a new Widget

Scan through your Dashboard live with the timeline slider & examine different periods

Click for full screen presentation mode

Resize, arrange and re-order widgets

TIP: Double-click on any graph area to bring up the Graph Data manager

CASTAWAY Samplers Wine Company

File Setup Forecast Reporting Window

Dashboard Design

Dashboard Settings

- Board Orientation
- Board Heading
- #[Report]
- Size: Large
- Widget Heading
- Size: Medium
- Header Background Colour

Graph Settings

- Show Heading
- Show Border
- Data: Edit Data
- Date Range: Use Slider, Fixed Dates (Jul 2016 to Jun 2017), Relative Dates (Duration: 12 months)
- Appearance

CASTAWAY 3-way business modelling

Castaway Dashboards Tell your financial story

Show the numbers in a way that engages your audience. Take them on a journey as you choose the relevant time period and move the numbers through time giving them a moving visual representation. Castaway's Dashboard slider gives you complete control over the story allowing you to tell the story you need to when you need it most.

Funds Flow

Month	Net Cash Movement	Cashflow From Operations	Cashflow From Investing	Cashflow From Financing
Jul	~100,000	~100,000	~0	~0
Aug	~350,000	~350,000	~0	~0
Sep	~100,000	~100,000	~0	~0
Oct	~-100,000	~0	~0	~0
Nov	~150,000	~150,000	~0	~0

Net Cash Movement per month

Month	Net Cash Movement
Jul	~100,000
Aug	~350,000
Sep	~100,000
Oct	~-100,000
Nov	~150,000

Debtors vs Creditors

Month	Closing Accounts Receivable	Closing Accounts Payable
Jul	~400,000	~100,000
Aug	~150,000	~100,000
Sep	~150,000	~100,000
Oct	~150,000	~100,000

Sales Jul to Nov

Donut chart showing Sales distribution for Jul to Nov.