Analytics

1. Analytics: Overview

The **Analytics** module provides a unified dashboard of key performance indicators (KPIs), user activity metrics, and operational insights across your Wifox Core environment. It combines real-time “widgets” (numerical summaries) with interactive charts to help you spot trends, track progress, and drill into specific data—whether you’re monitoring daily sign-ups, deposit volumes, or team performance. You can customize which widgets and charts appear, filter by date or category, and expand any panel for a closer look.

Accessing Analytics

On the left-hand navigation menu, click **Analytics** (Analytics). This opens the Analytics home page, which is divided into two main areas:
A top row of “widget” panels showing today’s high-level metrics (e.g., Turnover Today).
A grid of interactive charts below, each with its own controls for date range and full-screen viewing.

Layout Overview

When you first land on Analytics, you’ll see:

Filter & Customize Button
Located at the top-left (below the page title).
Clicking **Filter** opens a right-hand drawer labeled **Customize analytics**, where you can toggle individual widgets and charts on or off, reorder them, and set global versus personal filters.

Widgets (Top Row)
Four small “card” widgets display today’s numbers, each accompanied by a mini-sparkline of recent values:

1. **Turnover today**
2. **Clients registered today**
3. **Requests created today**
4. **Clients verified today**

Charts (Grid Below)
A two-column grid of various analytics charts. By default, the first eight charts are visible (you can add “Clients by countries” as a ninth chart via the customization panel). Each chart has:
A **calendar icon** ( ) to select a date range or switch granularity (day/month/year).
An **expand icon** ( ) to view that chart in full screen.

Top-Row Widgets

Each widget shows “today’s” count (or sum) plus a “0 for yesterday” comparison line. Hover over any bar/point in the miniature sparkline to see exact values.

Turnover today
Description: Shows the total transaction volume (in your base currency) processed so far today. Hover over each day’s bar to see specific daily turnover figures. The “0 for yesterday” line provides a quick comparison to the previous day.
Usage: Use this to monitor real-time transaction throughput and detect sudden spikes or drops in daily volume.

Clients registered today
Description: Displays the number of new client sign-ups completed today, with a mini-chart showing registrations over the past week. The “0 for yesterday” line gives historical context for yesterday’s count.
Usage: Quickly gauge onboarding performance—if registrations are lagging, you may need to investigate marketing channels or sign-up issues.

Requests created today
Description: Indicates how many service or support requests were opened today, plus a sparkline of recent request volumes. The “0 for yesterday” comparison highlights changes in ticketing load.
Usage: Track your support team’s daily workload and spot sudden increases in incoming requests (e.g., after a release).

Clients verified today
Description: Tracks the number of clients whose identity checks (KYC verifications) were completed today. The embedded mini-chart shows verification counts over the last week, and “0 for yesterday” provides a quick benchmark.
Usage: Use this widget to ensure your compliance/KYC pipeline is on schedule—if verifications dip, you may need to reallocate resources.

2. Interactive Charts

Below the widgets, each chart offers deeper insights. You can toggle between different tabs (e.g., “Pending / Declined / Completed” for pie charts) or switch time granularity via the calendar picker.

Clients registrations and FTDs by affiliate hubs

What It Shows:

A dual-axis chart with:

1. **Blue bars** = number of client registrations per affiliate hub
2. **Teal bars** = count of first-time deposits (FTDs) per affiliate hub
3. **Orange line** = total FTD amount per affiliate hub (in base currency)

Controls:
Affiliate Hub Dropdown: At the top-left of the chart, select from predefined “affiliate hubs” (customer segments or cohorts) to filter data.
Calendar Icon: Click to pick a custom date range.
Expand Icon: View full screen for detailed analysis.

> **Use Case:** Compare the number of users who registered in each affiliate hub with the number who made their first deposit, and see the total deposit value. For example, if hub_3 has high registrations but low FTDs, you may need targeted onboarding incentives for that segment.

Clients registrations over time

What It Shows: A simple line chart showing the number of client registrations across your selected interval (day, month, or year).

Controls:
Granularity Tabs (Day / Month / Year): Toggle above the chart to change the time axis.
Calendar Icon: Manually adjust the start/end dates for any custom period.
Expand Icon: Enlarge the chart for a detailed view.

> **Use Case:** View growth trends in registrations. For instance, you might spot a surge in April 2025 or compare mid-year sign-up rates year-over-year.

Transactions distribution by providers

What It Shows: Two pie charts, side by side, each showing the share of transactions by provider (e.g., Stripe, Crypto, PayPal, Bank Transfer, internal) for three different statuses:

1. **Pending**
2. **Declined**
3. **Completed**

Controls:
Status Tabs (Pending / Declined / Completed): Click the tab you want to view.
Calendar Icon: Select a date range to filter which transactions are included.
Expand Icon: See the pie chart in full screen.

> **Use Case:** Compare how each payment provider's share shifts from Pending to Completed or detect if one provider has a disproportionately high decline rate.

Average First Time Deposits over time

What It Shows: A line graph plotting the average amount (in base currency) of each client's first deposit (FTD) over your selected interval.

Controls:
Granularity Tabs (Day / Month / Year): Change the chart's time axis.
Calendar Icon: Pick a custom date range.
Expand Icon: Enlarge for detailed analysis.

> **Use Case:** Track whether new deposit sizes are trending up or down. For example, if the average FTD jumps in Q1 2024, it may coincide with a marketing campaign or bonus promotion.

Withdrawal counts by providers

What It Shows: A horizontal bar chart showing how many withdrawal transactions each provider (Stripe, Crypto, PayPal, Bank Cards, Bank Transfer, internal, etc.) handled over the chosen period.

Controls:
Calendar Icon: Filter by start/end dates.
Expand Icon: Full-screen bar chart.

> **Use Case:** Identify which withdrawal channels are most heavily used (e.g., if internal transfers dominate versus third-party processors), and detect shifts in channel preference.

Deposit counts by providers

What It Shows: Similar to the withdrawals chart, this horizontal bar chart breaks down deposit transaction counts by provider (Stripe, Crypto, PayPal, Bank Transfer, internal, etc.) over the selected time window.

Controls:
Calendar Icon: Choose a date range.
Expand Icon: Full-screen display.

> **Use Case:** Understand which deposit channels are most popular (e.g., if Bank Transfer or PayPal leads), and monitor how that mix changes during promotions or system updates.

Employees onboarding and offboarding trends

What It Shows: A grouped bar chart with two series:

1. **Blue bar** = count of employees onboarded
2. **Teal bar** = count of employees offboarded
   for each time interval (daily, monthly, or yearly).

Controls:
Granularity Tabs (Day / Month / Year): Switch to view daily, monthly, or annual trends.
Calendar Icon: Select a custom date window (e.g., Jan 1 2023 – Dec 31 2023).
Expand Icon: Enlarge for more detail.

> **Use Case:** Analyze hiring vs. attrition patterns. If you see a large "offboarded" spike in mid-2025, you may investigate exit-interview feedback or seasonal churn.

Managers performance

What It Shows: A combination chart (bar + line) where each manager's performance is broken down by:

1. **Blue bar ("count")** = number of clients managed by that manager during the selected period
2. **Teal line ("sum")** = total deposit volume (all clients combined) that those clients contributed

Controls:
Calendar Icon: Filter the period (e.g., 2024 Q2).
Expand Icon: View full-screen for long manager lists.

> **Use Case:** Compare which managers are signing up the most clients ("count") versus which managers' clients are depositing the highest sums ("sum"). A manager with high "count"

> but low “sum” might need coaching on upselling or account activation.

Clients by countries

What It Shows: A donut (ring) chart showing the distribution of clients by their country code (e.g., US, DE, PL, UA) over your selected period.

Controls:
Calendar Icon: Choose a date range for which client registrations to include.
Expand Icon: Full-screen doughnut chart.

> **Use Case:** Instantly see geographic concentration of your user base. If you notice fewer sign-ups from certain regions, you might consider targeted marketing or localization efforts there.

3. Customizing Analytics

Click the **Filter** button at the top-left of the Analytics page. This slides out a **Customize analytics** panel on the right side of the screen.

Personal Filters: These toggles and settings apply only to your personal view. If you hide a particular widget or chart here, it remains hidden the next time you log in (unless you toggle it back on).

Global Filters: These settings apply to everyone in your organization. Enabling or disabling a chart under Global Filters affects all user views.

Toggles and Reordering

Within either tab, you'll see two sections:

Widgets (top of the list)

1. **Turnover**
2. **Clients**
3. **Requests**
4. **Client verifications:** Each widget has a toggle switch. Turn it off to hide that card from the top row; turn it on to show it again.

Charts (below Widgets)

1. **Clients registrations and FTDs by affiliate hubs**
2. **Clients registrations over time**
3. **Transactions distribution by providers**
4. **Average First Time Deposits over time**
5. **Withdrawal counts by providers**
6. **Deposit counts by providers**
7. **Employees onboarding and offboarding trends**
8. **Managers performance**
9. **Clients by countries** (if enabled)

Toggle each chart on/off to control its visibility.

Reordering: Drag the "hamburger" icon (☰) next to each chart name up or down to rearrange their order on the main dashboard. The topmost chart in the list becomes the first chart in the grid.

Hover-Over Info (Tooltips)

Each section heading (Widgets/Charts) has an “info” icon (ℹ). Hover over it to see a brief explanation, such as:
“You can change the visibility of some cards and rearrange their order.”
In the chart toggle list, each chart has a small “expand” icon (□) that, when hovered, shows extra detail—e.g.:
“Drop filters and sorting.”

Saving Changes

After adjusting toggles and reordering, click **Save** at the bottom of the **Customize analytics** panel.
The page will automatically refresh to show or hide the selected widgets/charts and apply your arrangement.

4. Filtering Date Ranges & Granularity

Every chart (and certain widgets) includes a **calendar icon** (📅) at the top-right corner of its frame
Clicking that icon opens a mini date-picker where you can:
Select Predefined Periods (e.g., Last 7 Days, Month-to-Date, Year-to-Date).
Pick Custom Start and End Dates to zoom in on a specific timeframe.

Switch Granularity (Day / Month / Year) for line or bar charts:
In time-series charts (e.g., Clients registrations over time, Average FTD over time, Employees onboarding/offboarding), you'll see three tabs labeled **Day**, **Month**, and **Year**. Toggling among them changes how data aggregates on the X-axis.
Once you select a date range or change granularity, the chart reloads to display only data within that window.

Chart-Specific Details & Examples

Below is a consolidated list of all charts with thorough descriptions of their purpose, controls, and user-tips for each.

> **Note:** Whenever you see "Expand Icon," it refers to the ↔ icon at the top-right of a chart that opens the chart full-screen.

1) Clients registrations and FTDs by affiliate hubs

Purpose: Shows how each predefined affiliate hub (cohort or segment) performs in terms of new registrations versus first-time deposit activity.

Visuals:
Blue bars = number of client registrations.
Teal bars = first-time deposit (FTD) counts.
Orange line = total FTD amount (monetary volume) in each affiliate hub.

Controls:
Affiliate Hub Dropdown: Choose an affiliate hub (drop-down labeled "Please select") to focus only on that cohort.
Calendar Icon: Select a custom date range.
Expand Icon: View full-screen.

Tips:
If the orange line is zero for affiliate hub_4, it means no FTD amount was recorded in that group.
Hover over any bar to see the exact numeric values.

2) Clients registrations over time

Purpose: A simple trend line showing how many clients registered over your chosen period.

Visuals: A blue line connecting data points (one per day, month, or year).

Controls:
Granularity Tabs: Day / **Month** / **Year** (above the chart).
Calendar Icon: Pick a custom date window.
Expand Icon: Full-screen view.

Tips:
To analyze weekly spikes, set granularity to **Day** and select that week's date range.
For high-level trends, switch to **Year**.

3) Transactions distribution by providers

Purpose: Exhibits the percentage share of transactions handled by each payment provider, separated by status: Pending, Declined, or Completed.

Visuals:
Two pie charts side by side (one for the selected status tab, one that updates if you switch statuses).
Each slice is color-coded by provider (e.g., green for Bank Transfer, purple for Crypto).

Controls:
Status Tabs (Pending / Declined / Completed): Click to switch the pie slices.
Calendar Icon: Filter by date.
Expand Icon: Full-screen.

Tips:
Click on the **Completed** tab to see final success rates.
If "internal" (yellow) dominates, most transactions are handled by the internal ledger rather than third-party rails.

4) Average First Time Deposits over time

Purpose: Displays the average deposit amount of each client's first deposit (FTD) over the chosen period.

Visuals: A single blue line with Y-axis showing monetary value (e.g., 0 – 5,000).

Controls:
Granularity Tabs (Day / Month / Year).
Calendar Icon.
Expand Icon.

Tips:
If the data point for 2024 is at 4,500, that means the average FTD in 2024 was 4,500 (in your base currency).
Use **Month** granularity to see how average FTD evolves month by month.

5) Withdrawal counts by providers

Purpose: Shows how many withdrawal transactions each provider handled over a specified time window.

Visuals: A horizontal bar chart with providers on the Y-axis and counts on the X-axis.

Controls:
Calendar Icon: Filter by date.
Expand Icon: Full-screen.

Tips:
If the “internal” bar extends to 400,000, that means 400,000 withdrawal transactions were processed internally.
Hover over each bar to see exact counts.

6) Deposit counts by providers

Purpose: Similar to withdrawals, this chart breaks down the number of deposit transactions per provider.

Visuals: A horizontal bar chart with color-coded providers.

Controls:
Calendar Icon.
Expand Icon.

Tips: Look for anomalies—e.g., if “Stripe” has 150 deposits this month versus “PayPal” with 80, you may decide to prioritize integrating more features with Stripe.

7) Employees onboarding and offboarding trends

Purpose: Visualize your internal team’s hiring (onboarded) versus attrition (offboarded) patterns over time.

Visuals:
Blue bars = Onboarded count

Teal bars = Offboarded count

Controls:
Granularity Tabs (Day / Month / Year).
Calendar Icon (for custom intervals).
Expand Icon.

Tips:
If you see a sudden spike in 2025 for “Onboarded,” that likely reflects a hiring wave (e.g., opening a new department).
Use **Month** granularity to identify specific months with high offboarding.

8) Managers performance

Purpose: Compare team managers by how many clients they managed (“count”) and the total deposit volume their clients generated (“sum”).

Visuals:
Blue bars (“count”) along the bottom (number of clients).
Teal line (“sum”) overlaid with a separate Y-axis on the right (total deposit volume).

Controls:
Calendar Icon: Select date range.
Expand Icon.

Tips:
A manager with a high blue bar but low teal line may have many clients who deposit small amounts.
Conversely, a manager with a modest bar but a tall teal point may be handling fewer but higher-value accounts.

9) Clients by countries

Purpose: Show the geographic distribution of your user base by country code.

Visuals: A donut (ring) chart where each slice represents a country’s share of total clients.

Controls:
Calendar Icon: Filter by registration date range.
Expand Icon.

Tips:
Each color-coded slice is labeled with the two-letter ISO code (e.g., US, DE, PL).
Hover over a slice to see the exact percentage or count of clients in that country.

5. Tooltip and Help Text

Inline Tooltips: Each chart heading and each toggle in the **Customize analytics** drawer has a small info icon (ℹ) that explains the purpose of that element. For example:

Hovering over the “Manage performance” toggle shows:

> *“Compare each manager’s performance over the selected period: ‘count’ shows how many clients they managed and ‘sum’ shows total deposits by those clients.”*

Hovering over “Turnover today” indicates:

> *“Shows the total transaction volume processed so far today, along with a sparkline of recent days and a ‘0 for yesterday’ comparison.”*

Clarification Popovers: In any chart toggle list (Global Filters tab), clicking or hovering the small expand icon next to a chart name might reveal a note like:

> *“Drop filters and sorting.”*

Example Workflow

Initial Setup
Visit **Analytics** via the sidebar.
By default, you see eight visible charts and four widgets (Turnover, Clients, Requests, Verifications).

Customize Visibility
Click **Filter** to open **Customize analytics**.
Under **Personal Filters**, toggle off any charts you don’t need (e.g., “Clients by countries”).
Drag **Managers performance** above **Withdrawal counts** if you want it to appear higher on your dashboard.
Click **Save** to apply changes.

Filter by Date

Click the calendar icon in **Clients registrations over time**.

Select June 1, 2024 to December 31, 2024 for a mid-year review.

Observe how the registration curve behaves in that window.

Drill into a Chart

Click the expand (□) icon on **Transactions distribution by providers**.

In full-screen mode, click the **Declined** tab to focus solely on declined transactions.

Hover over each pie slice to see provider names and decline percentages.

Compare Widgets

Check **Clients registered today** to see if your average registrations are up or down compared to yesterday’s “0 for yesterday” baseline.

Switch to **Clients verified today** to ensure KYC is keeping pace with new sign-ups.