

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.

Revision #3

Created 20 July 2025 13:01:50

Updated 6 April 2026 14:35:12 by Anastasiia Rudaya