Nabler's dynamic tooltip for funnel view with text definitions that include additional measures.

The client

The client is a global data and analytics company that provides data and technology services, analytics, predictive insights, and fraud prevention for a wide range of industries. The company's customers include businesses within the insurance, financial services, healthcare and corporate sectors as well as the local, state and federal government, law enforcement and public safety.

The need

The client needed dynamic tooltips for better readability of data and wanted to add definitions to different metrics of a funnel. When hovered on the particular metric, the tooltip should be displaying data related to that particular metric with definition.
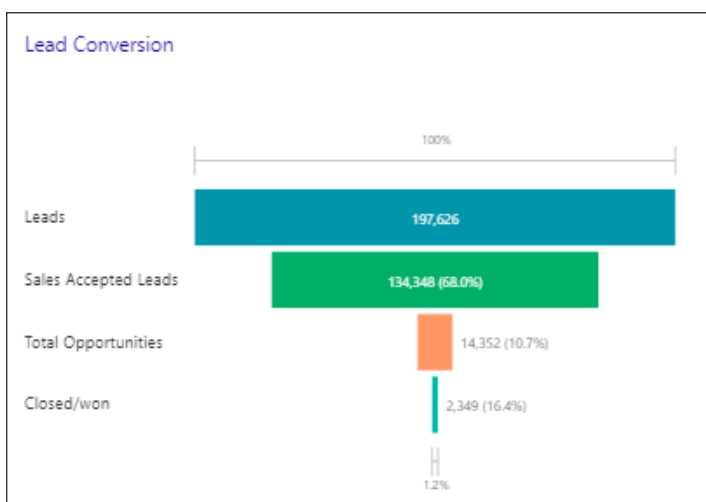
The problem
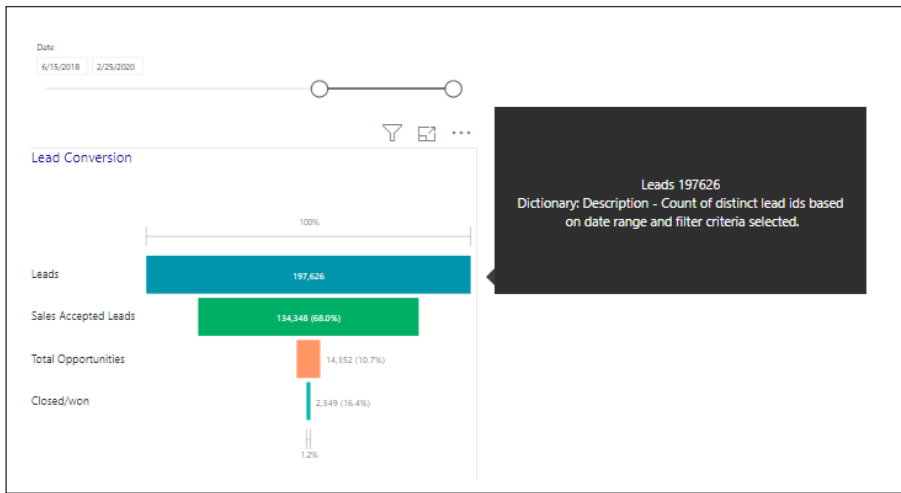
The Funnel view has following measures:

Total Leads- The total number of leads generated.

Sales accepted leads-The total number of leads accepted by sales.

**Total Opportunities**-The leads which are converted to opportunity.

Closed/Won opportunities- Total number of opportunities that has been closed/won.

Since all the fields are metrics, there was a challenge of showing tooltips for particular metrics. E.g. when the users hovered on any of the metrics such as leads,the tooltip showed all the metrics available in the tooltip window which confused the end-user and wasn't also dynamic in nature.

The tooltip acted as another window which appeared side by side and hence there wasn't any need for it.
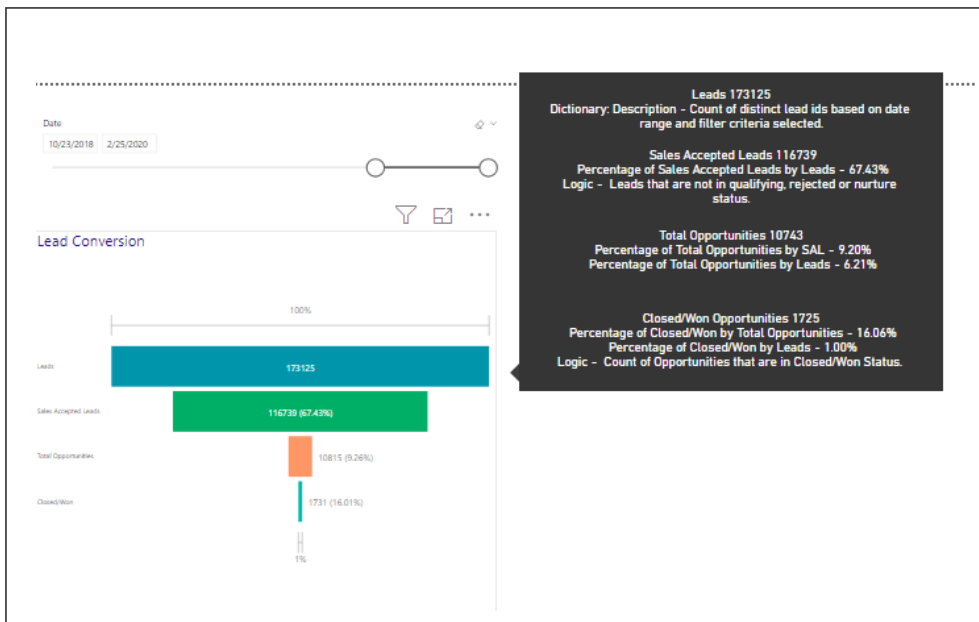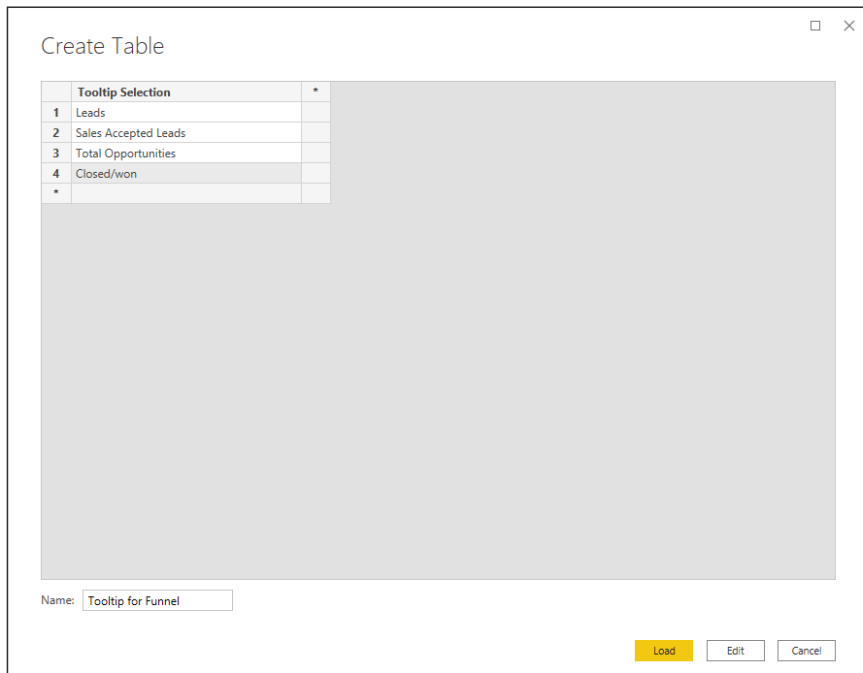

Our approach

In order to make it dynamic to show different definitions and logics for that particular metrics, we used dynamic dimension technique using switch statement and variables in DAX.

Step 1

Create a new table with "Tooltip Selection" as the name of the table and the metrics names as the values of the table.


We Loaded the table

Step 2

We then created a new measurement for the funnel view and named the measurement as 'Value'.

Funnel View Measure= VAR Selection =
SELECTEDVALUE ('Tooltip for Funnel'[Tooltip Selection], "All")
RETURN
SWITCH (
TRUE (),
Selection = "Leads",[Leads],
Selection = "Total Opportunities",[Funnel Tab1_opportunities],
Selection = "Closed/won",[Funnel Tab1_closed/won1],
Selection = "Sales Accepted Leads",[Sales Accepted Leads])

Now bring in the tooltip selection column from the Tootip for funnel table that we created to group field in funnel visual and funnel view measure.
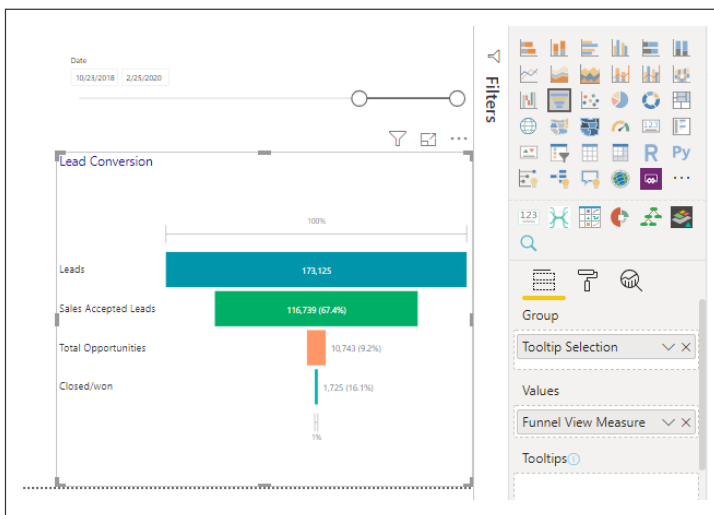
Step 3

We added a new page and name it as 'Tooltip for funnel'.

Under the paint brush icon(format), we changed the page information as follows

Page name-Tooltip for funnel

We toggled the tooltip and enabled it.

We changed the page size to following:

Type-Tooltip

We then created a measure for the tooltip to be dynamic. The name of the measure was, 'Description tooltip'.

Description Tooltip = VAR Selection =

SELECTEDVALUE ('Tooltip for Funnel'[Tooltip Selection], "All")

RETURN

SWITCH (

TRUE (),

Selection = "Leads", "Leads "& [Leads]& UNICHAR(10) &"Dictionary: Description - Count of distinct lead ids based on date range and filter criteria selected.",

Selection = "Total Opportunities","Total Opportunities " &[Funnel Tab1_opportunities]

& UNICHAR(10) & " " &"Percentage of Total Opportunities by SAL -

"&FORMAT(DIVIDE([Funnel Tab1_opportunities],[Sales Accepted Leads]),"0.00%")

& UNICHAR(10) & " " &"Percentage of Total Opportunities by Leads -

"&FORMAT(DIVIDE([Funnel Tab1_opportunities],[Leads]),"0.00%")

& UNICHAR(10) &"Logic - Count of distinct Opportunity Ids from the leads that are selected based on date range and filter criteria (#1 above). Opportunities not connected to a lead will be excluded.",

Selection = "Closed/won","Closed/Won Opportunities " &[Funnel Tab1_closed/won1]

& UNICHAR(10) & " " &"Percentage of Closed/Won by Total Opportunities -
"&FORMAT(DIVIDE([Funnel Tab1_closed/won1],[Funnel Tab1_opportunities]),"0.00%")

& UNICHAR(10) & " " &"Percentage of Closed/Won by Leads - "&FORMAT(DIVIDE([Funnel
Tab1_closed/won1],[Leads]),"0.00%")

& UNICHAR(10) &"Logic - Count of Opportunities that are in Closed/Won Status. ",

Selection = "Sales Accepted Leads"," Sales Accepted Leads " &[Sales Accepted Leads]

& UNICHAR(10) & " " &"Percentage of Sales Accepted Leads by Leads -
"&FORMAT(DIVIDE([Sales Accepted Leads],[Leads]),"0.00%")

& UNICHAR(10) &"Logic - Leads that are not in qualifying, rejected or nurture status.")

Bring in a card visual and fit it in a way it covers the whole page and bring the Description
Measure to the field value of the card.

The value shows as (Blank) as we had not selected any values.

Step 4

We went back to our funnel visual and under paint brush icon(Format),enabled the tooltip.

Type-Report page

Page-Tooltip for funnel

Hence, when we hovered on specific measures we saw only the related values.

The result

The client was able to read data without any confusions. The detailed description of the metric along percentage change helped the client analyse data with more ease and flexibility.

Nabler is a Digital Analytics company.
We help enterprises and media agencies analyse digital data to better understand customer behaviour and enable revenue driving decisions. Founded in 2004 with offices in Bangalore, Charlotte and Denver, we have advised some of the top global brands, media agencies and Fortune 500 companies.

CSAT Score

8.9 / 10

nabler