

# Theming and White Labeling with ConverSight

Customizing Themes and Managing Chart Series in ConverSight.



Datasheet



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# I. Introduction

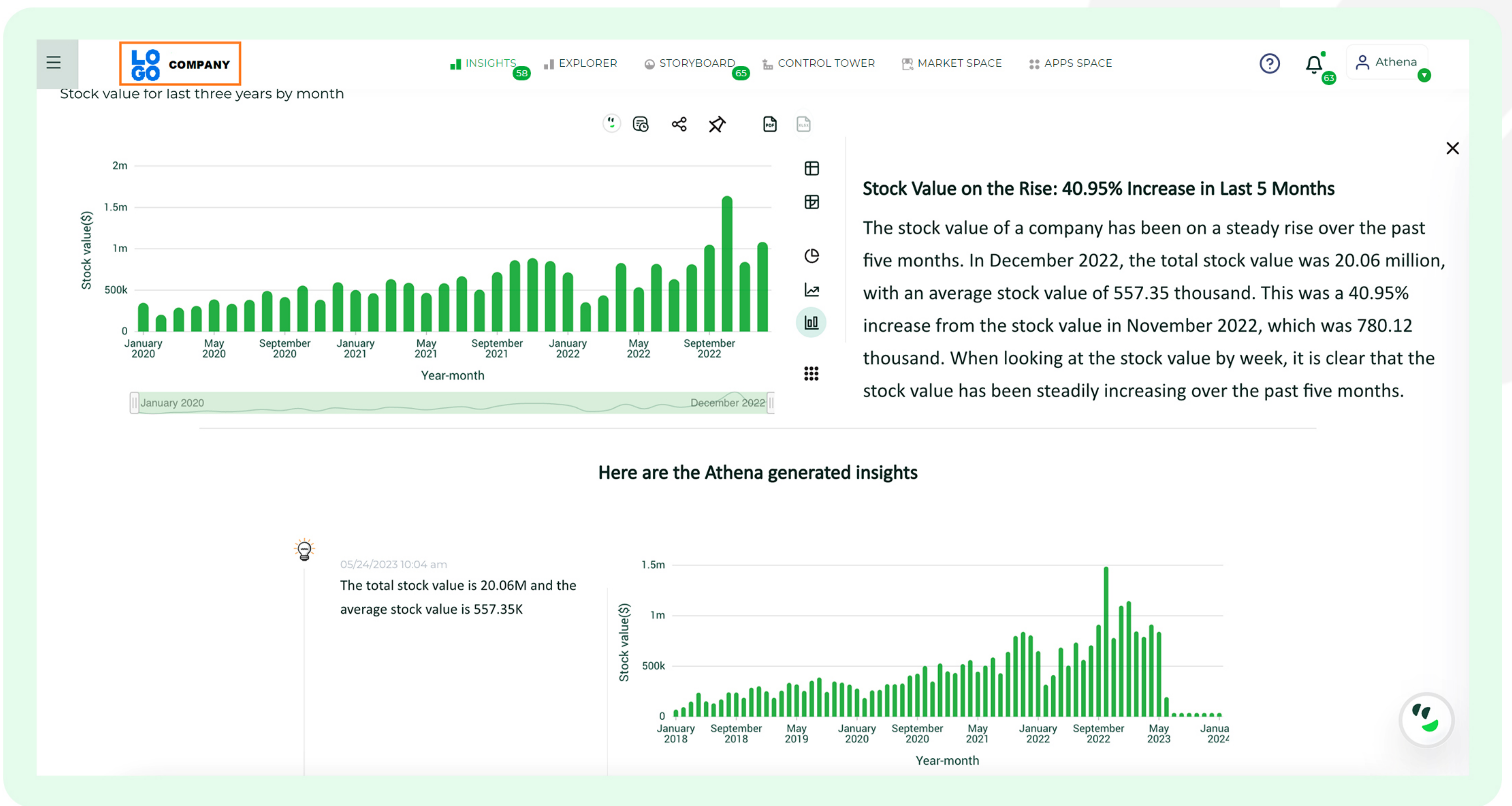
In the realm of digital identity and user experience, white labelling represents a strategic approach in the digital realm, enabling businesses and organizations to repackage and market products or services originally developed by other entities under their own branding. This practice expedites market entry and ensures the maintenance of a consistent brand identity, delivering a distinctive and customized experience to clientele. Theme customization allows users to infuse their unique style and identity into their digital platforms. By tailoring the design and aesthetics, users can create an environment that resonates with their audience and strengthens brand recognition. Chart customization empowers users to present data in a visually compelling and informative way. Customized charts not only enhance the clarity of data but also contribute to a seamless brand experience.

## 2. Customizing ConverSight

ConverSight, as a Unified Decision Intelligence platform, places considerable importance on the central role of white labeling to deliver a fully customized user experience. We recognize the unique nature of each user and organization, which is why ConverSight offers comprehensive white labeling options designed to cater to these individual distinctions. By embracing the distinct identities of both individual users and organizations, ConverSight extends customization beyond logo adjustments. Users have the flexibility to personalize the platform's theme and chart appearances according to their preferences. This level of adaptability empowers users to craft a digital environment that seamlessly reflects the brand's identity, fostering a robust connection between the brand and the overall user experience.

### 2.1 Logo Customization

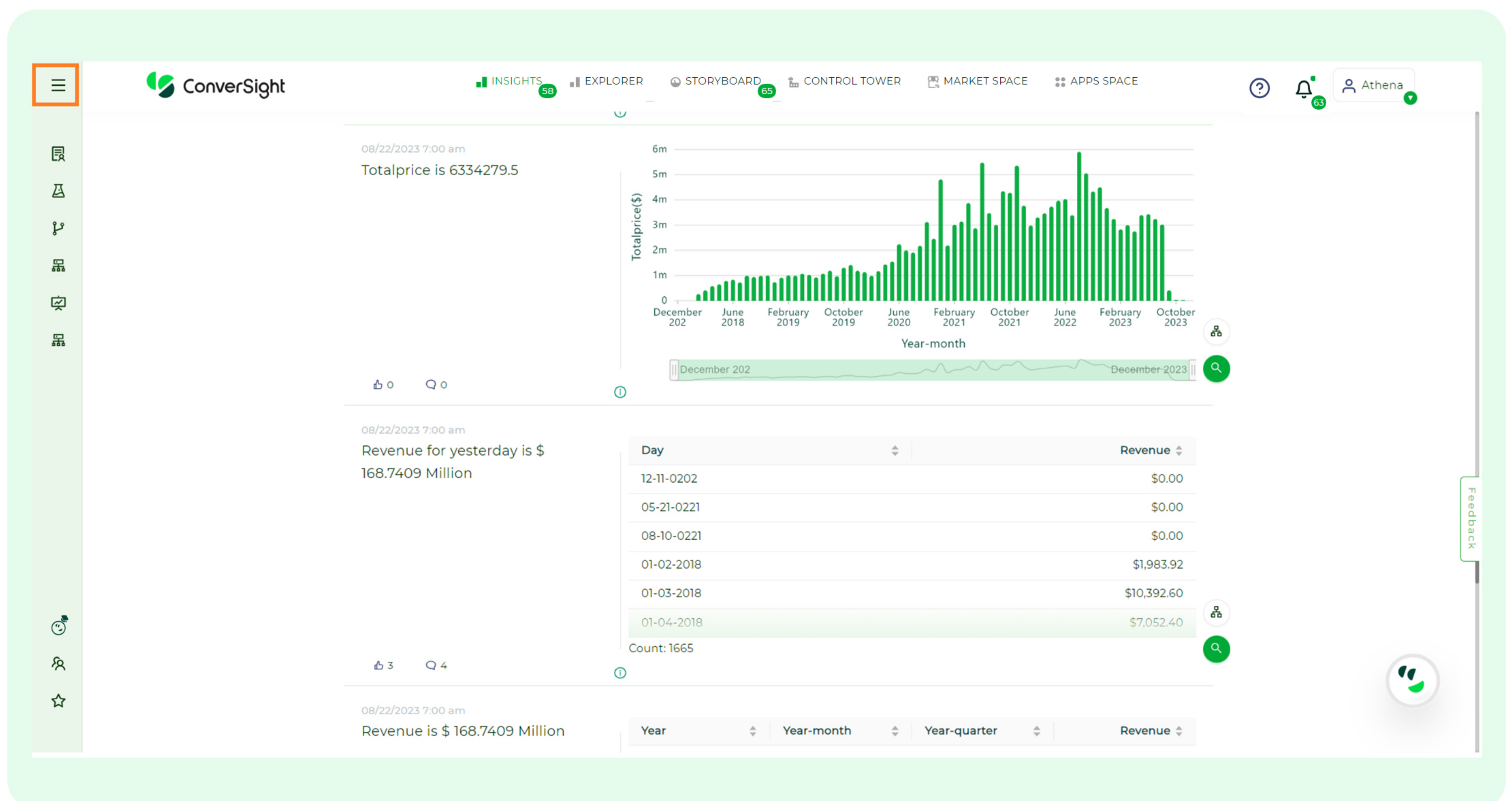
The logo customization feature provides users with the ability to replace the ConverSight logo with their organization's logo, offering a white labelling capability. This, in turn, allows users to imbue the platform with their corporate identity, resulting in a personalized and professional experience for both the team members and clients. By seamlessly incorporating their logo into ConverSight, organizations can significantly bolster brand recognition and maintain a cohesive visual identity throughout the entire platform. The initial step in customizing the logo within the platform is to contact the ConverSight Admin.



## 2.2 Theme Customization

In ConverseSight, theme customization is an exclusive privilege reserved solely for organizational administrators. User access to customize themes is restricted to ensure a consistent and controlled visual identity across the platform. This approach maintains brand integrity and admin oversight in tailoring the ConverseSight experience. Let's explore how to customize themes in the ConverseSight platform.

Expand the Configuration panel.



Under the 'Data Workbench' menu, choose the 'Data Governance' option.

The screenshot shows the ConverSight interface with the 'Data Governance' menu item highlighted in the left sidebar. The main dashboard area contains three data visualization components:

- Top Chart:** A bar chart titled 'Totalprice is 6334279.5' showing 'Totalprice(\$)' on the y-axis (0 to 6m) and 'Year-month' on the x-axis (December 2018 to October 2023).
- Middle Table:** A table titled 'Revenue for yesterday is \$ 168.7409 Million' with columns 'Day' and 'Revenue'. It lists several dates and their corresponding revenue values, with the most recent entry being '01-04-2018' with a revenue of '\$7,052.40'.
- Bottom Table:** A table titled 'Revenue is \$ 168.7409 Million' with columns 'Year', 'Year-month', 'Year-quarter', and 'Revenue'. It shows a summary of revenue data.

Click on 'Preferences' button.

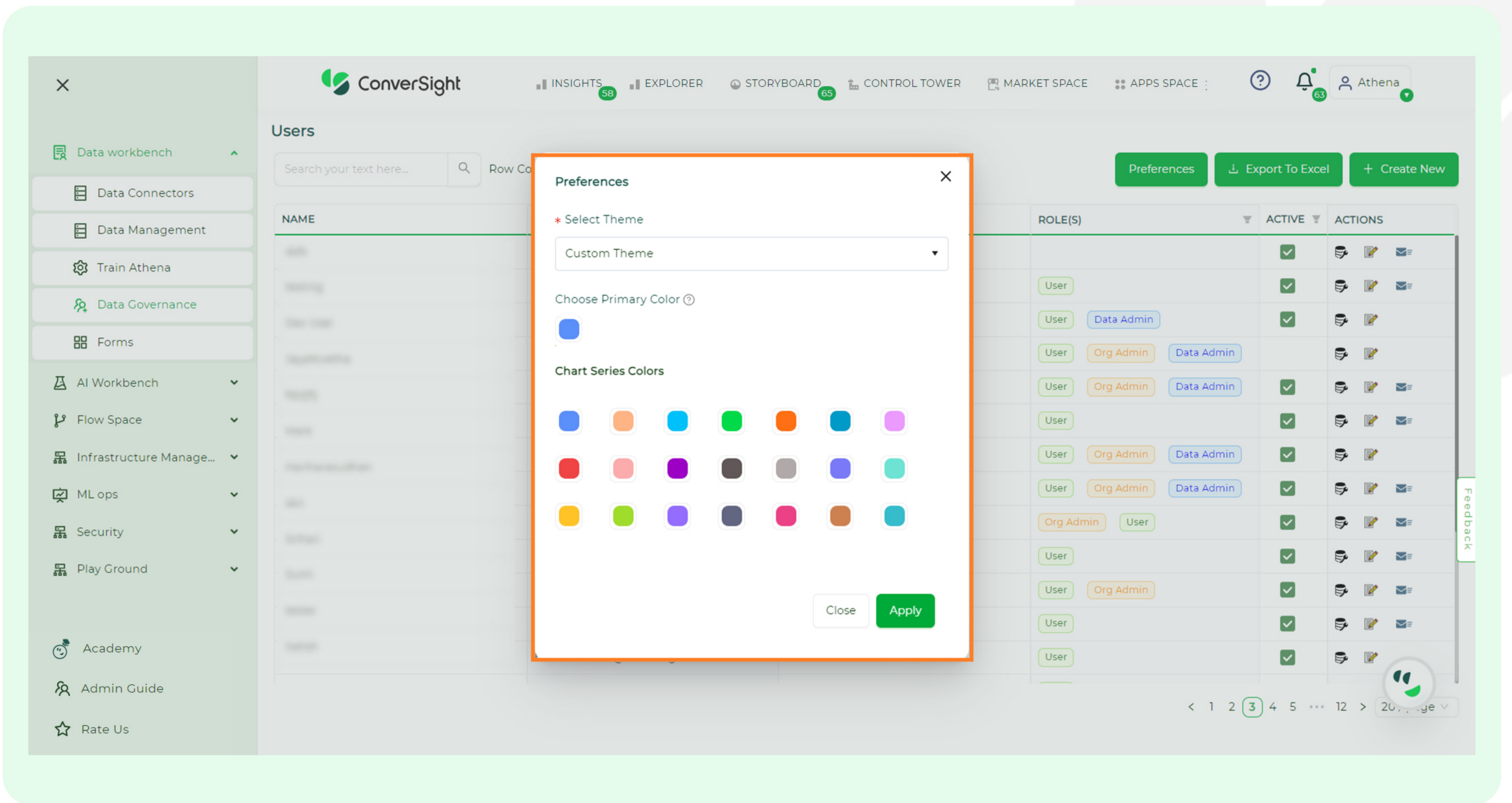
The screenshot shows the 'Users' management page in ConverSight. The page features a table with columns for 'Name', 'Email', 'Designation', 'Role(s)', 'Active', and 'Actions'. The 'Preferences' button is highlighted in the top right corner of the table area. The table contains 12 rows of user data.

Name	Email	Designation	Role(s)	Active	Actions
Navins	navinsammul@gmail.com	User	User	✓	🗑️ 📧
Saithivel	sakthivelmurugasamy@conversight.ai	Developer	User Data Admin Org Admin	✓	🗑️ 📧
Test	athenatester@conversight.ai	Tester	User Org Admin Data Admin	✓	🗑️ 📧
Magesh	magesh.sivivisan@conversight.ai	Trainee	User Data Admin	✓	🗑️ 📧
test	abc@oob.com	test	User	✓	🗑️ 📧
Ganesh Kumar	ganeshkumar.rajkumar@conversight.ai	User	User	✓	🗑️ 📧
Jala	e@g.com	ugihg	User	✓	🗑️ 📧
sumi	sumithirakathir@gmail.com	product engineer	User	✓	🗑️ 📧
Login Test	ganeshms2009@yahoo.com	test	User	✓	🗑️ 📧
Bob	bobmichieis@thickstat.com	CustomerSuccessManager	User	✓	🗑️ 📧
Tina	cassandra.kamick@conversight.ai	Marketing Lead	User	✓	🗑️ 📧
Maha	mahamohaniamugam@thickstat.com	Technology Director	User Data Admin	✓	🗑️ 📧
Sethiskar	sethiskar.gokulkrishnan@conversight.ai	Product Engineer	Org Admin Data Admin User	✓	🗑️ 📧

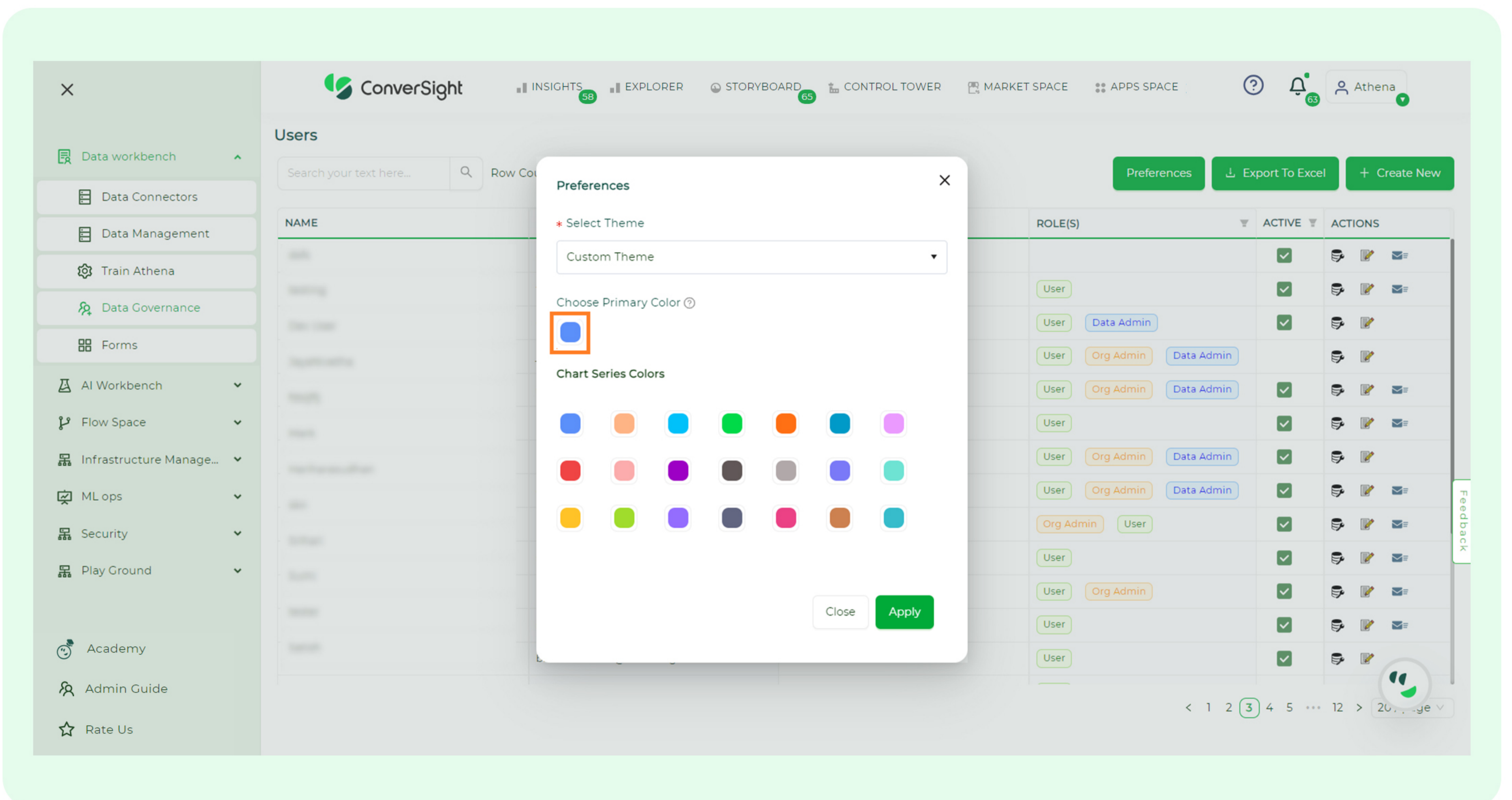
In the Preferences Dialog box, users can choose between two themes:

**Default Theme:** Applies the platform's default color settings.

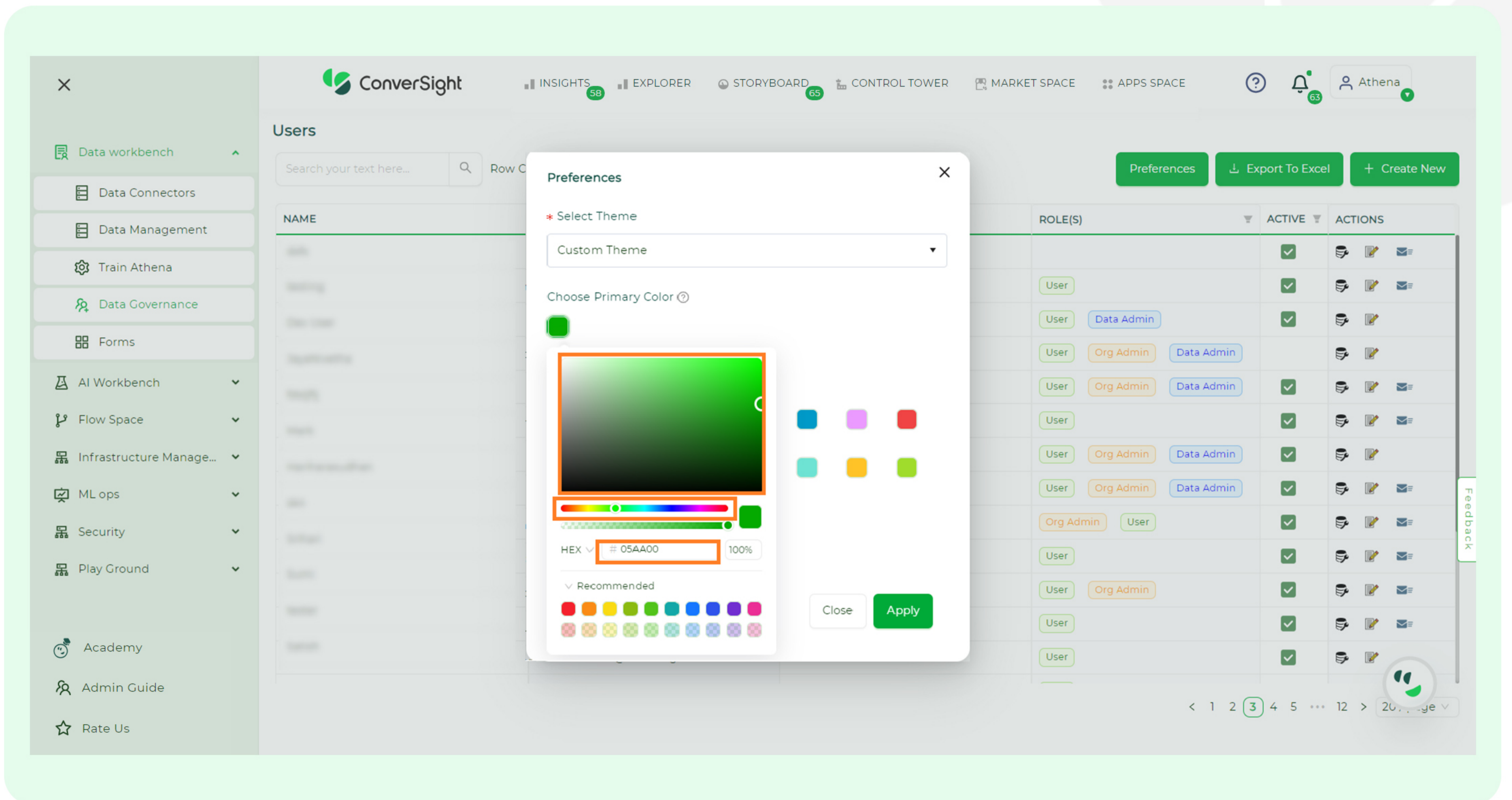
**Custom Theme:** Lets users to personalize the platform's color settings according to their preferences. Choose 'Custom Theme' from the options.



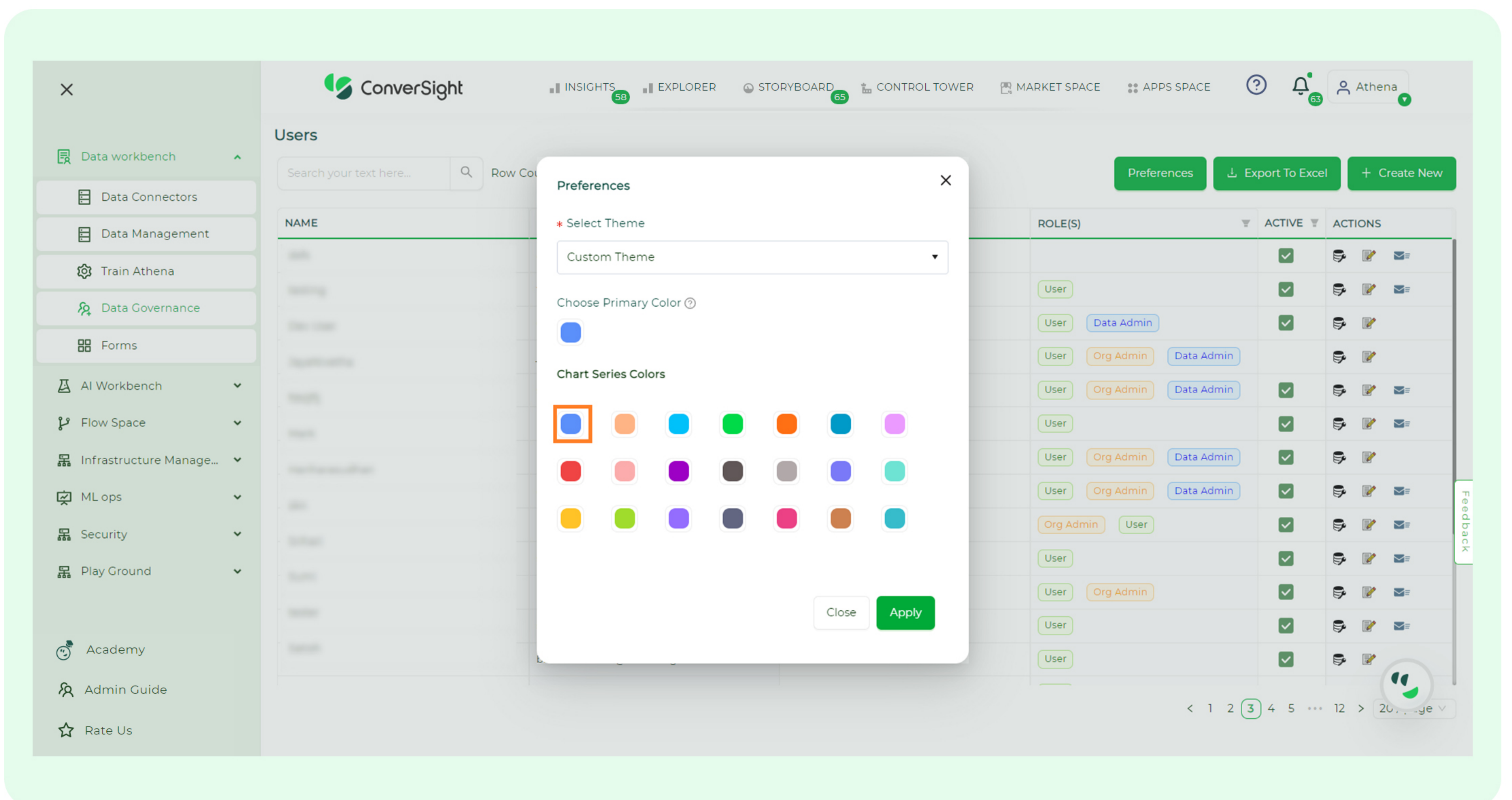
Users can set the platform's overall theme by selecting a color within the **'Choose Primary Color'** option.

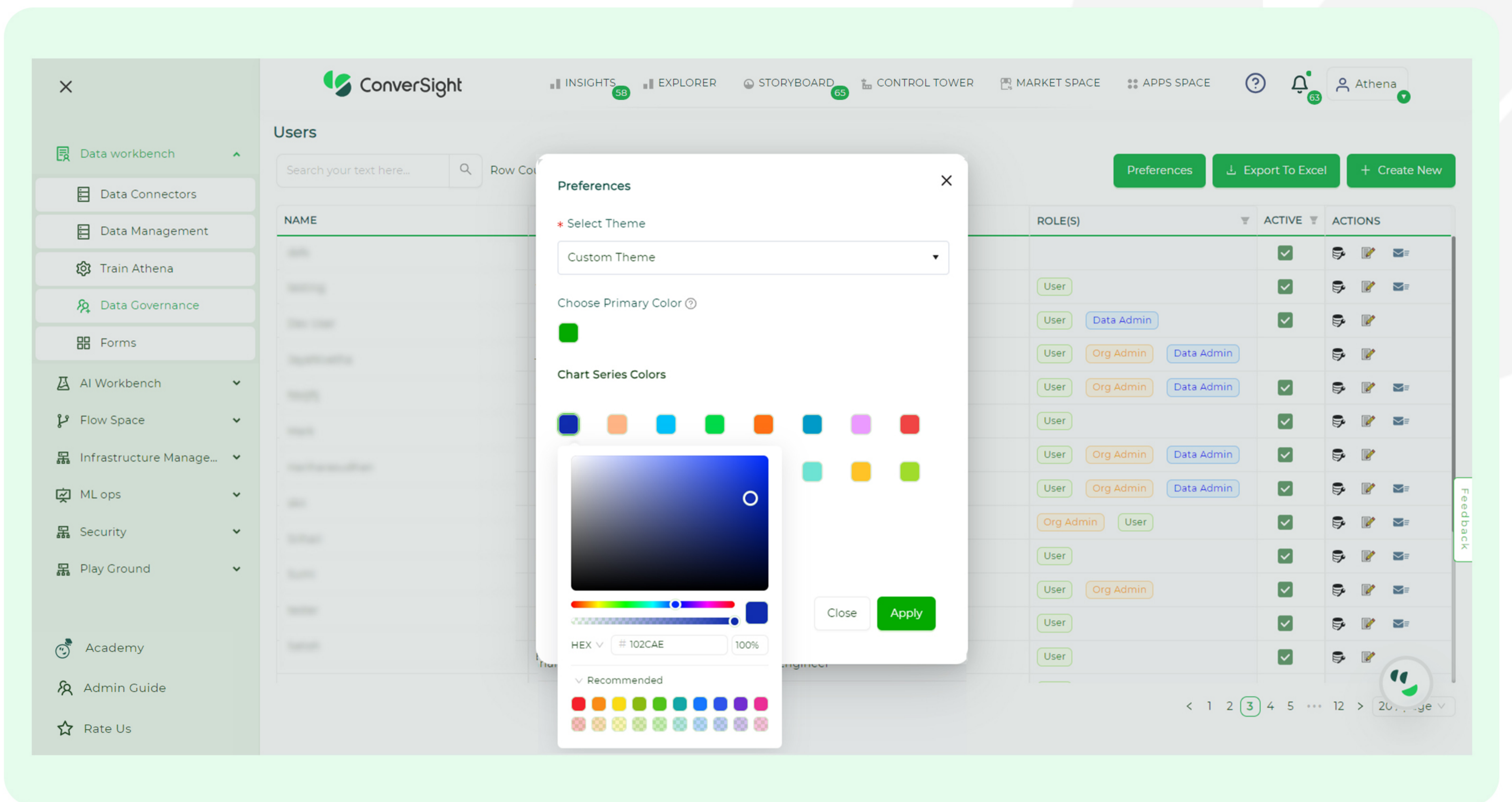


The flexibility to adjust colors is provided through options such as the slider, color chooser or by providing the Hex code. Moreover, fine-tuning colour transparency can be achieved either via the slider or by specifying a transparency percentage.



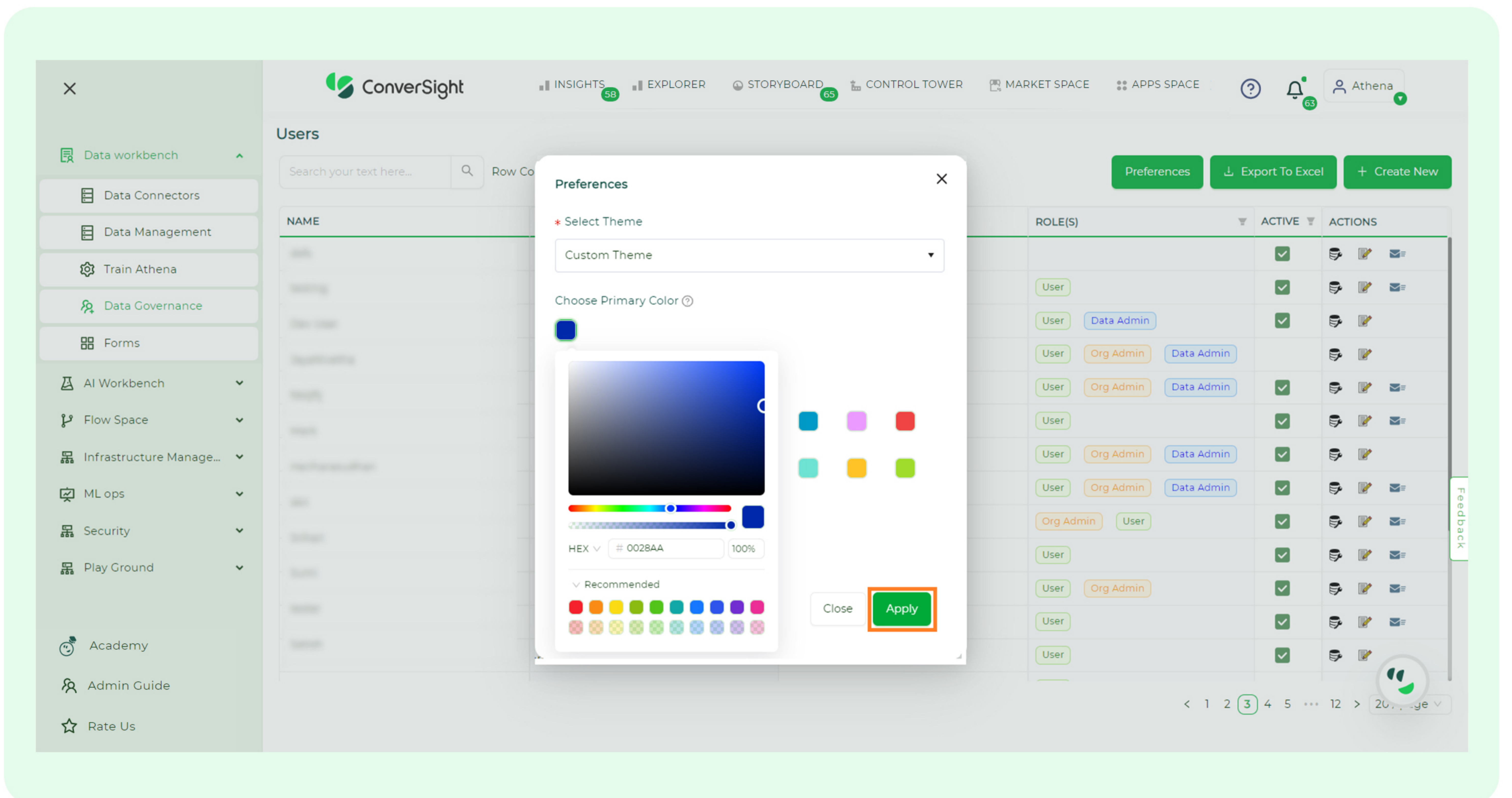
To customize chart colors, simply click on the colors within the **'Chart Series Color'** section. Each color corresponds to a specific element of the chart, with the first color denoting the first chart element, the second color signifying the second element and so forth. The changes are reflected in all the charts.





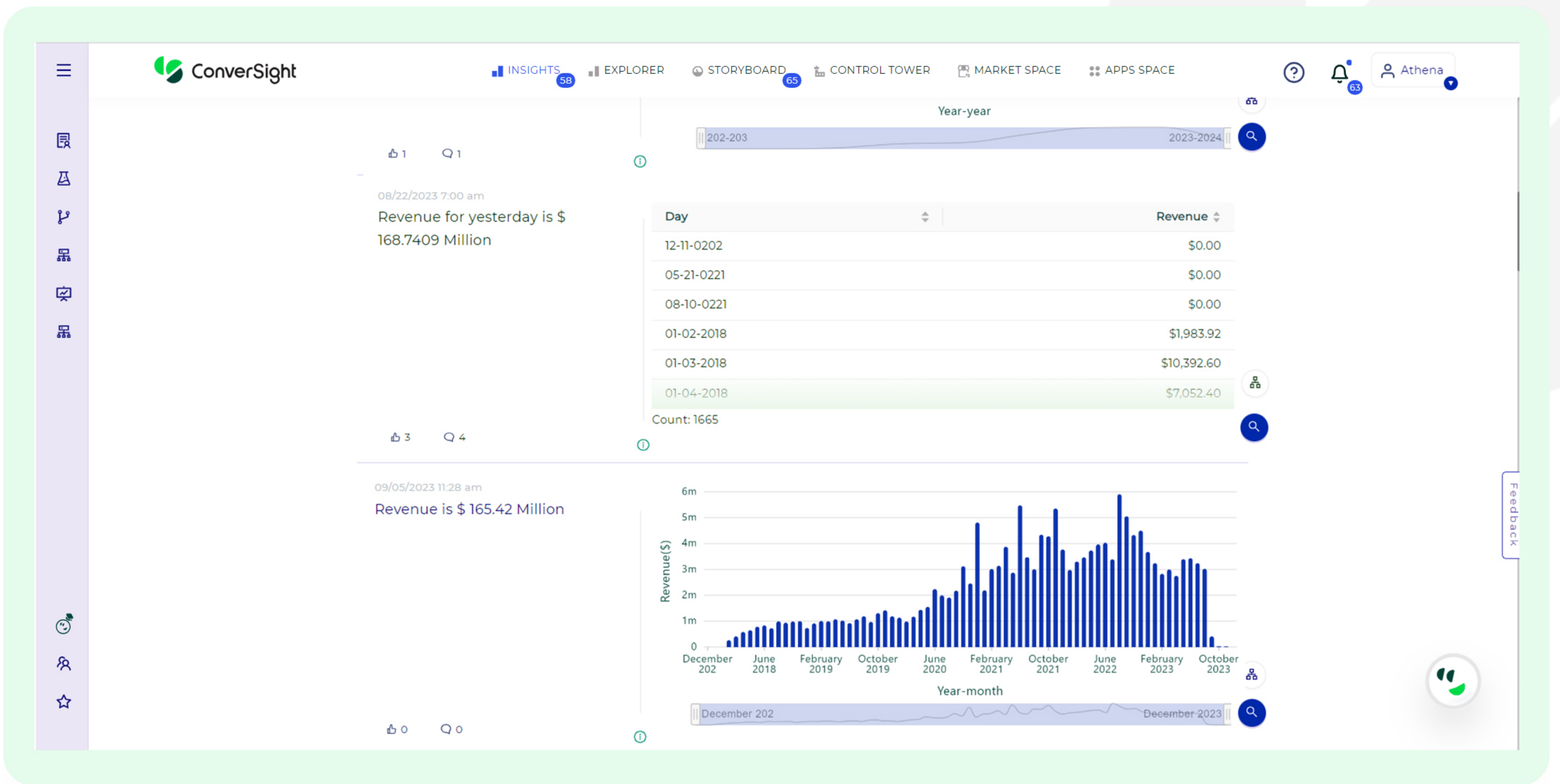
Users can fine-tune both the color and opacity of the chart colors by following the same steps used to adjust the platform's theme.

After selecting the desired color, click on the **'Apply'** button.



The modifications in the theme are reflected throughout the platform.

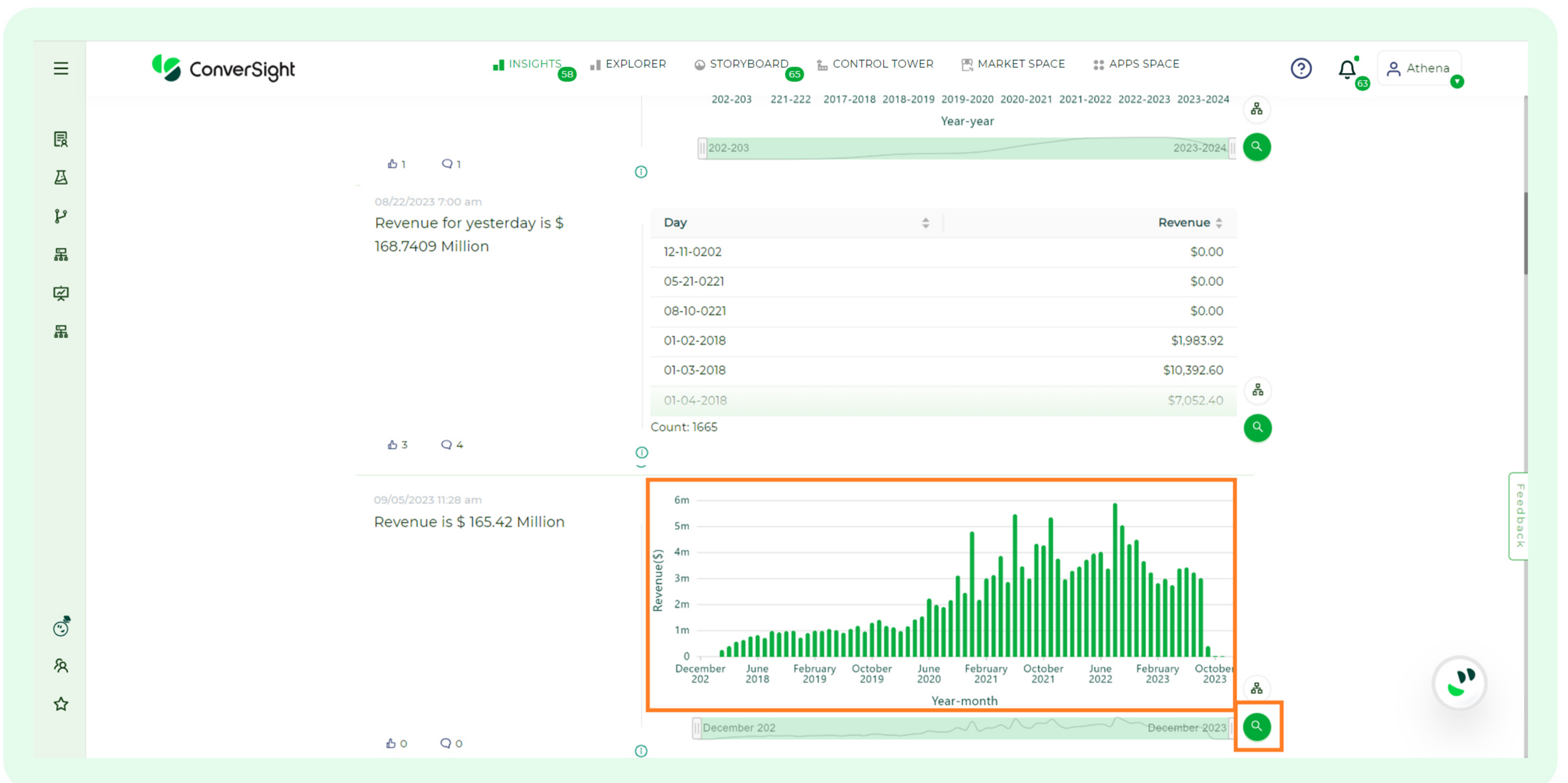




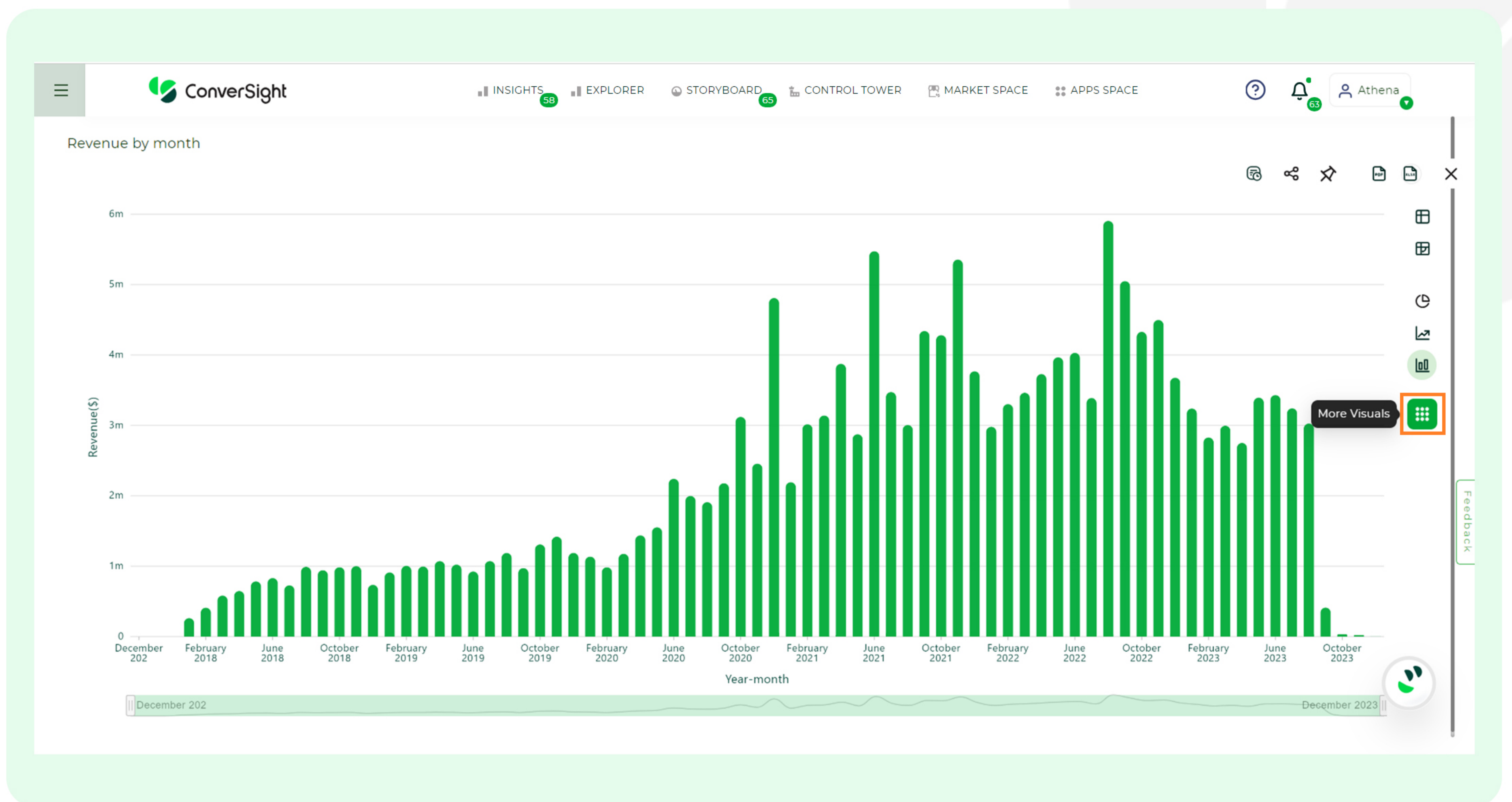
## 2.3 Chart Customization

Within the ConverSight Platform, all users possess the privilege to to customize each individual element within every chart. This level of access allows users to make precise adjustments and customizations to various elements within charts, ensuring that they can tailor the visual aspects and data representation according to their specific needs and preferences throughout their ConverSight experience. The steps below guides in customizing the chart colors.

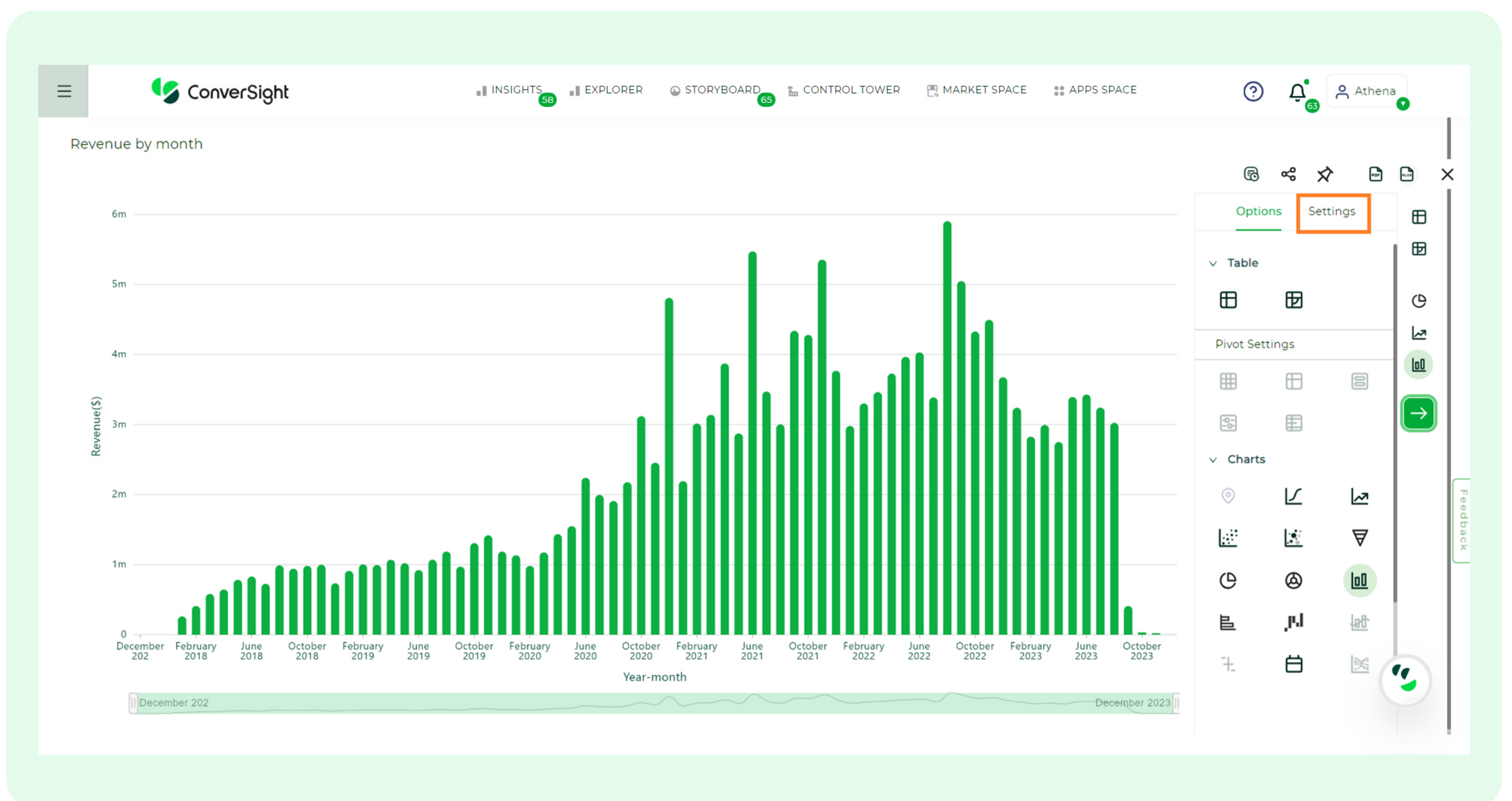
To change the color of a chart, click on the **'Explore'** icon that corresponds to it.



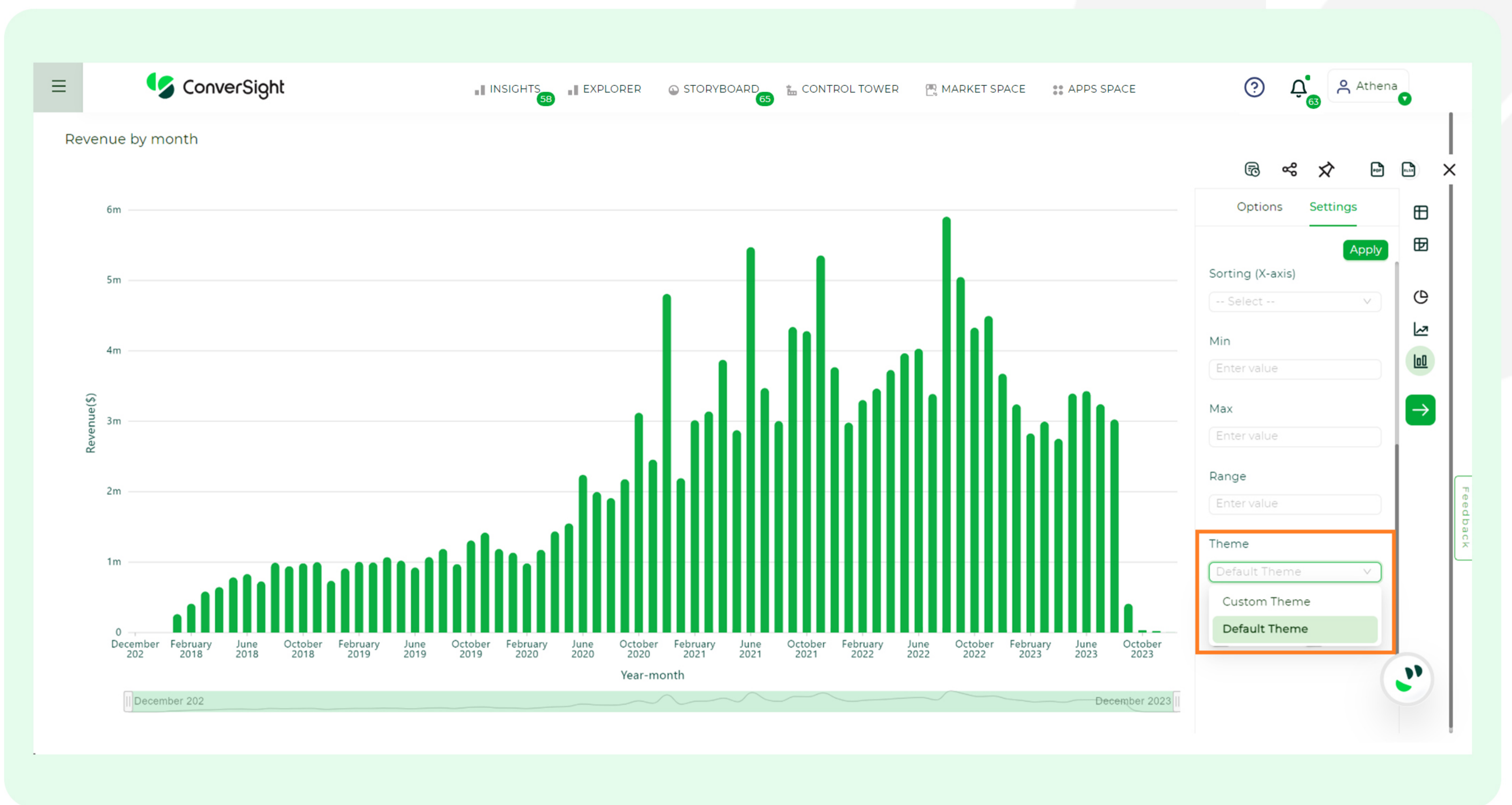
Choose **'More Visuals'**.



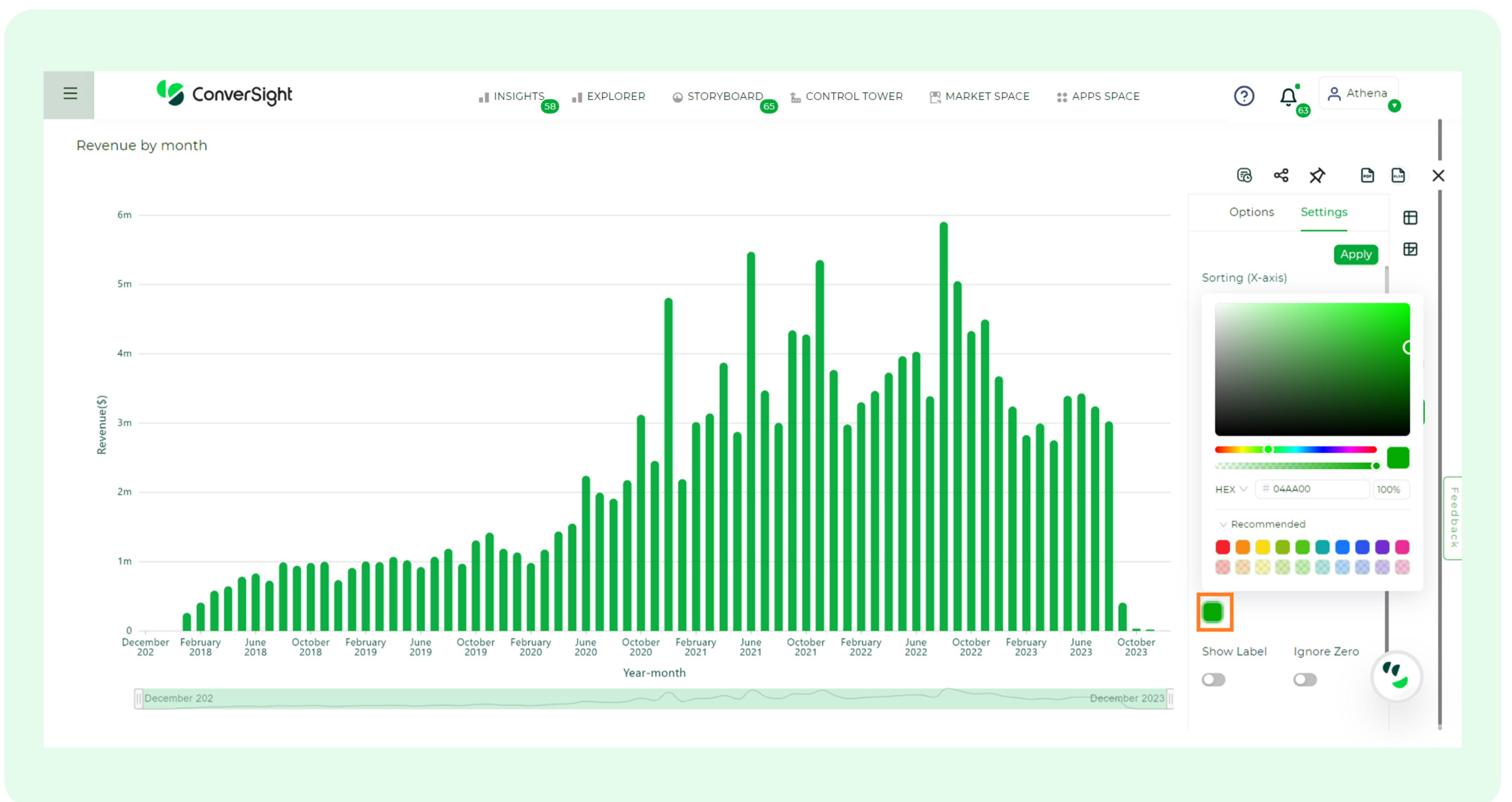
Click on the **'Settings'** tab.



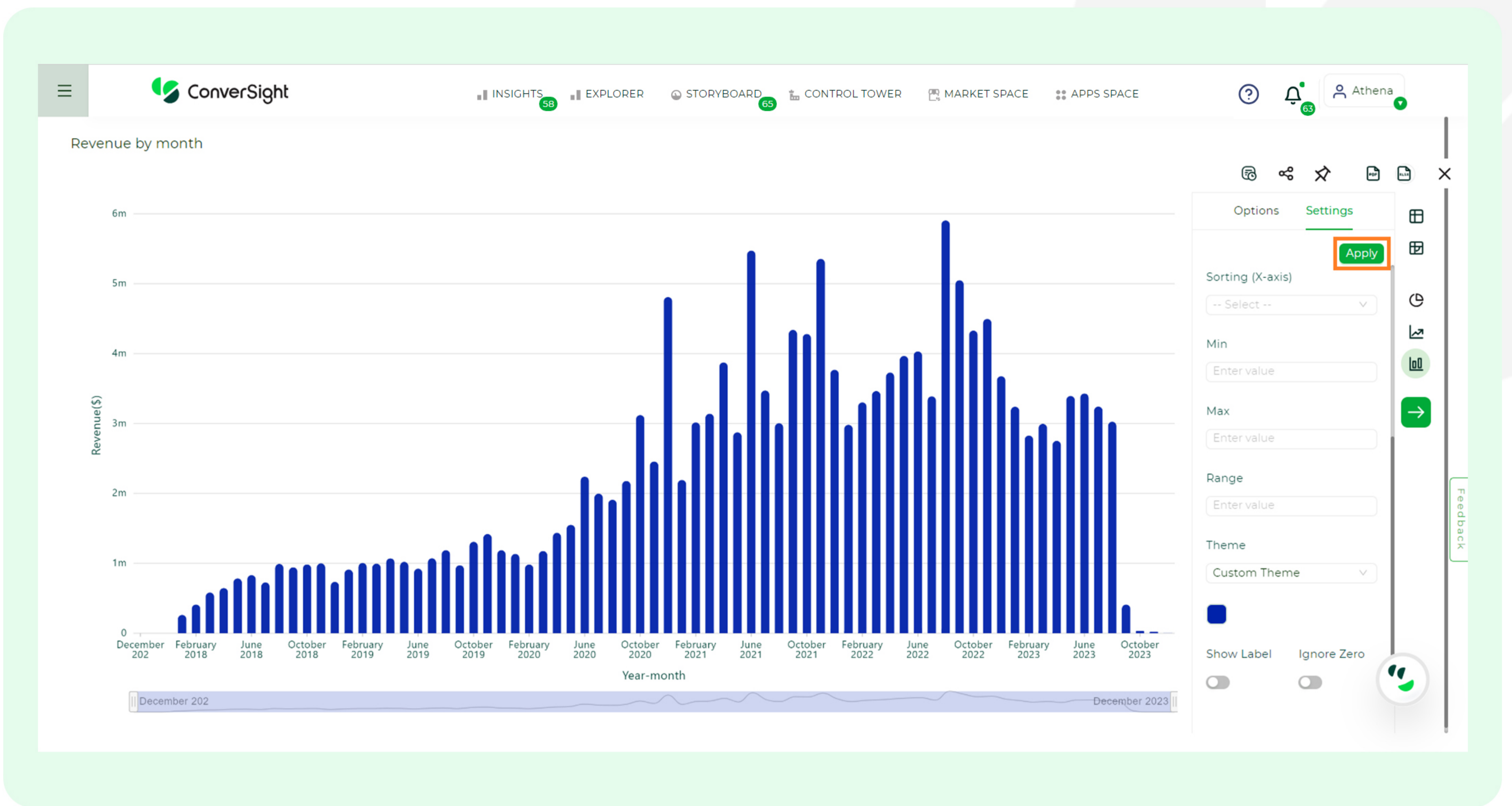
Scroll down to access **'Theme'** and select the **'Custom Theme'** option from the drop-down menu.



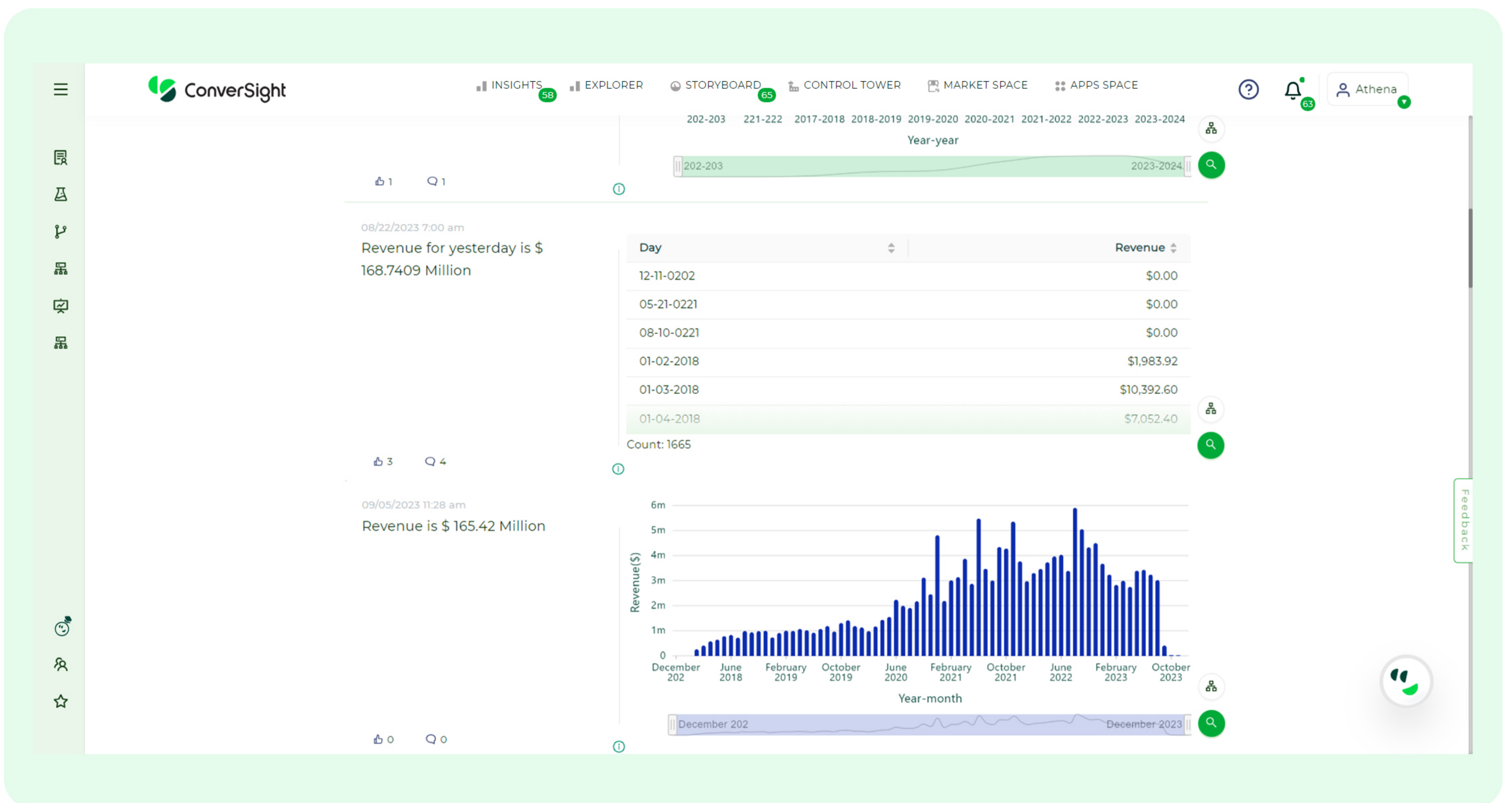
Customize chart colors and transparency effortlessly with pickers or Hex codes, sliders or percentage inputs. Each color corresponds directly to a specific chart element, ensuring a smooth customization experience.



After selecting a chart color, click on 'Apply' to implement the changes.



Modifications applied to a particular chart exclusively impact that chart.



### 3. Conclusion

ConverSight stands out as a versatile platform by providing users with the ability to tailor themes to match their branding, fine-tune charts to convey data effectively and Whitelabel the platform to maintain a consistent brand presence. ConverSight's array of customization features not only enhances the visual appeal of analytics dashboards but also fosters brand identity and professionalism, ultimately contributing to improved data comprehension and stakeholder engagement.

## Join our customers who have accelerated growth with ConverSight



### About ConverSight

ConverSight's Adaptive Analytics platform uses conversational AI, Natural Language Processing and machine learning to converge the distance between humans and data through data stories, presenting the meaning of data in the most effective, personalized and efficient form possible. ConverSight's patented AI business assistant, Athena, connects distributed databases to answer questions and Augment the consumers through 4 key functions: Information on demand, Automated Story Telling, Proactive Insights, and Recommended Actions.

For more information, visit [www.conversight.ai](http://www.conversight.ai)

