

Apply Conditional Formatting to Tables or Charts

Apply conditional formatting to tables or charts to highlight values in the data. This makes values above, below, or within a particular threshold stand out.

Understand Conditional Formatting

Many companies create dashboards with key metrics they want to track in daily or weekly staff meetings. Using conditional formatting, they can see at a glance how they are performing relative to these metrics.

You can add visual cues for KPIs (Key Performance Indicators) or threshold metrics to charts and tables, to easily show where you are falling short or exceeding targets. These visual cues are called conditional formatting, which applies color formatting to your search result. For tables, you can add conditional formatting to set the background color of cells in a table based on the values they contain. For charts, you can add conditional formatting to show the threshold(s) you defined, and the data that falls within them will be shown using the same color.

Apply Conditional Formatting to a Table

You can apply conditional formatting to both table cells and column summaries. You can specify a background color, font color, and/ or font style: bold, italics, underlined, or strikethrough. You can create conditional formatting rules for both measures and attributes. For pivot tables, you can only create conditional formatting rules for measures.

Pivot tables follow the same conditional formatting rules as tables, even though they fall under Alchemer Dashboard's chart category. However, you cannot set different conditional formatting rules for pivot table cells and pivot table column summaries.

You can only apply conditional formatting to numbers and strings. For example, you can apply conditional formatting to a `month of year` column, with values such as `January` , but not to date column where dates are in the format `1 Jan 2021` . For pivot tables, you can only apply conditional formatting to measure, not attributes.

If you create multiple conditional formatting rules for one measure or attribute, the first rule you create overrides the others, if there is a conflict. To change which rule overrides the others, simply drag and drop the rule to the top of the list of conditional formatting rules.

In the following example, the christmas table cell falls under both the is christmas rule, and the not winter rule. Currently, the not winter rule overrides the is christmas rule, so the christmas table cell does not have red text and a green background.

Selling Season	Total Revenue
christmas	2.73B
fall	2.92B
spring	1.69B
summer	6.66B
winter	4.06B

UNIQUE C...	TOTAL
5	18.05B

Table has 5 rows

Selling Season

Column Summary

Conditional formatting

- Not winter
- christmas

+ Add rule

To create a conditional formatting rule:

1. Select the **edit table configuration** icon to the upper right of your table. The **Edit table** panel appears, on the **Configure** menu.
2. Select the measure or attribute you would like to add a conditional formatting rule for.
3. The **Edit** panel for that column appears. Under **Conditional formatting**, select **+ Add rule**. If you would like to add conditional formatting for a column summary, select **Summary** under the column name, and click **+ Add rule**.

When you create a rule for a column, it does not automatically apply to the column summary. You must create a separate rule for the column summary.

Total Revenue by Customer City, Selling Season, Customer Name

Customer City	Selling Season	Customer Name	Total Revenue
algeria 0	summer	customer#000013 651	15.63M
algeria 0	summer	customer#000017 558	8.39M
algeria 0	winter	customer#000013 751	4.66M
algeria 1	christmas	customer#00002 0135	12.1M
algeria 1	christmas	customer#00002 6791	5.15M
algeria 1	fall	customer#00000 2539	8.26M
algeria 1	fall	customer#00000	24.32M
UNIQUE COUNT	UNIQUE COUNT	UNIQUE COUNT	TOTAL
248	5	1.18K	18.05B

Conditional formatting panel: + Add rule

4. Select an operator. The valid options for attributes are `is`, `not`, `contains`, `does not contain`, `starts with`, `ends with`, `empty`, and `not empty`. The valid options for measures are `less than`, `greater than`, `less than or equal to`, `greater than or equal to`, `equal to`, `not equal to`, `between`, `empty`, and `not empty`.

5. Specify the column value(s) that the formatting should affect.

6. Choose a background color, font color, and/or font style: bold, italics, underlined, or strikethrough.

In this example, if the `selling season` is (=) `christmas`, the background color for the table cell is green, and the font color is red.

Total Revenue by Customer City, Selling Season, Customer Name

Customer City	Selling Season	Customer Name	Total Revenue
algeria 0	summer	customer#000013 651	15.63M
algeria 0	summer	customer#000017 558	8.39M
algeria 0	winter	customer#000013 751	4.66M
algeria 1	christmas	customer#00002 0135	12.1M
algeria 1	christmas	customer#00002 6791	5.15M
algeria 1	fall	customer#00000	8.26M
UNIQUE COUNT	UNIQUE COUNT	UNIQUE COUNT	TOTAL
248	5	1.18K	18.05B

showing the first 1724 rows.

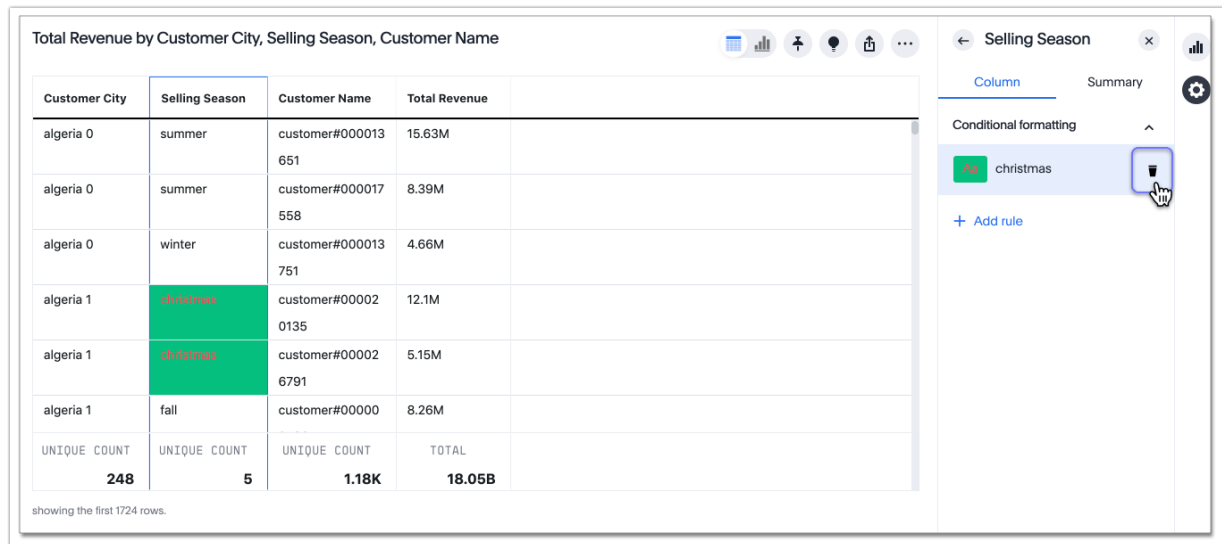
Add rule dialog:

- Operator: `is`
- Value: `christmas`
- Background: `green`
- Font: `red`

Buttons: Cancel, Save

7. Select **Save**. The system applies the rule to the column or column summary.

- You can edit an existing rule from the **Edit** panel for the column by selecting the rule.
- You can delete a conditional formatting rule from the **Edit** panel for the column. Select the **delete** icon that appears when you hover over a rule.



If you change to a chart type, you must apply conditional formatting again. Conditional formatting is tied to the specific visualization.

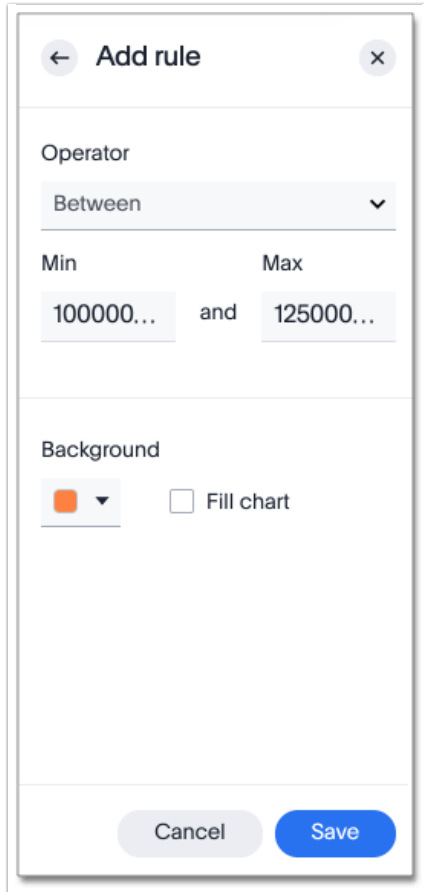
Apply Conditional Formatting to a Chart

You can use conditional formatting to show charts with a target value or range drawn as a line in the chart, and the legend colors determined by where values fall relative to the target.

To apply conditional formatting to a chart (in this example, *Total Revenue by Supplier Country*), follow these steps:

- Select the **edit chart configuration** icon to the upper right of your chart. The **Edit chart** panel appears, on the **Configure** menu. Alternatively, you can select the **Conditional formatting** option in the axis menu for the measure you would like to add a conditional formatting rule for.
- From the **Edit chart** menu, select the measure you would like to add a conditional formatting rule for.
- The **Edit** panel for that column appears. Under **Conditional formatting**, select **+ Add rule**.
- Select an operator. The valid options for measures are **less than**, **greater than**, **less than or equal to**, **greater than or equal to**, **equal to**, **not equal to**, and **between**.

5. Select the conditional value, or in the case of the **between** operator, the conditional range. Here, we apply conditional formatting to revenue values between **100 million** and **125 million** .



The image shows a mobile-style dialog box titled "Add rule". At the top left is a back arrow and the title "Add rule", and at the top right is a close "x" button. Below the title is a section for "Operator" with a dropdown menu currently showing "Between". Underneath are two input fields: "Min" with the value "100000..." and "Max" with the value "125000...", separated by the word "and". Below this is a "Background" section with a color selector (currently showing orange) and an unchecked checkbox labeled "Fill chart". At the bottom of the dialog are two buttons: "Cancel" and "Save".


6. To specify a different color of the conditional format, choose the new color from the color selector.

This option draws upper and lower limit lines on the chart, and colors the chart elements that meet the conditional requirements.


← Add rule ×

Operator
Between ▾

Min Max
100000... and 125000...

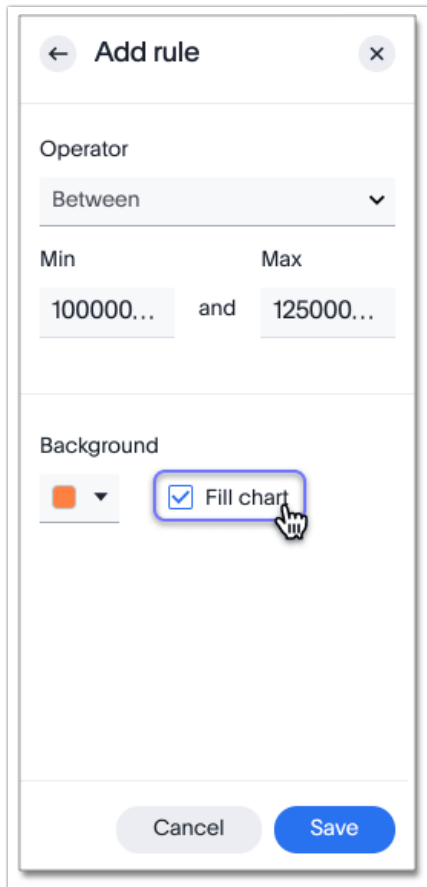
Background
  ▲ Fill chart

Red	Blue	Yellow	Green	Orange
Pink	Light Blue	Light Yellow	Light Green	Light Orange
Dark Red	Dark Blue	Dark Yellow	Dark Green	Dark Orange
Dark Purple	Dark Teal	Dark Olive	Dark Grey	Dark Brown

#FF8142 

Cancel Save

Alternatively, you can place a range band on the chart. Select the **Fill chart** option.



7. To add another condition, select + **Add rule** below the rule(s) you already created.

8. To remove a defined conditional format, navigate to the **Edit** panel for the measure. Select the **delete** icon that appears when you hover over a rule.

9. Select **Done**.

Here, you can see a chart that highlights elements with conditional formatting on some elements. You can also see how the same chart appears with a background chart band.



Limitations

The following chart types do *NOT* support conditional formatting:

- Funnel
- Geo area
- Geo bubble
- Geo heatmap
- Heatmap
- Donut
- Radar
- Sankey
- Treemap

Advanced conditional formatting

Rather than simply using conditional formatting comparing a column's measures to a single value (for example, `sales > 10000`), you can now use conditional formatting to compare a column's measures to another column. For example, if you search for `sales this year` versus `sales last year`, you can highlight where sales this year were less than last year. You can set multiple conditional formatting rules to a single table or chart. The new **Conditional formatting** window allows you to manage all conditional rules in one place.

To enable this feature, contact your administrator.

To create a conditional formatting rule on a chart or table, follow these steps:

1. On a table, select the **more options** menu icon to the right of your selected column and choose **Conditional formatting** from the dropdown menu. On a chart, open the **edit chart configuration** menu select the tile for your selected column, and click **Edit** under **Conditional formatting**.

Alchemer Dashboard does not support advanced conditional formatting on pivot tables.



2. In the **Conditional formatting** pop-up window, select **+ Add condition**

3. Choose whether to set a **Value based** or **Column based** condition.

Value-based conditions let you compare the column's values to a certain numerical value. Column-based conditions let you compare the column's values to the values of another column.

4. From the left dropdown menu, you can choose whether to change the column you're basing the condition on.

5. From the center dropdown menu, select an operator. The valid options for attributes are is, not, contains, does not contain, starts with, ends with, empty, and not empty. The valid options for measures are less than, greater than, less than or equal to, greater than or equal to, equal to, not equal to, between, empty, and not empty.

6. For value based conditions, use the left option to enter your desired value. For column based conditions, use the left dropdown menu to select the comparing column.

7. Choose a background color, font color, and/or font style: bold, italics, underlined, or strikethrough.

8. [Optional] For rules on a table, you can choose to highlight the entire row for all values that fit the condition.

9. Select **Apply**. The system applies the rule to the column.

10. You can edit an existing rule from the **Edit** panel for the column by selecting the rule.

11. You can delete a conditional formatting rule from the **Edit** panel for the column. Select the rule from the **Edit** panel and click **Remove**.



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