

Quick Start Guide

Quick start guide: Get started with Dashboard

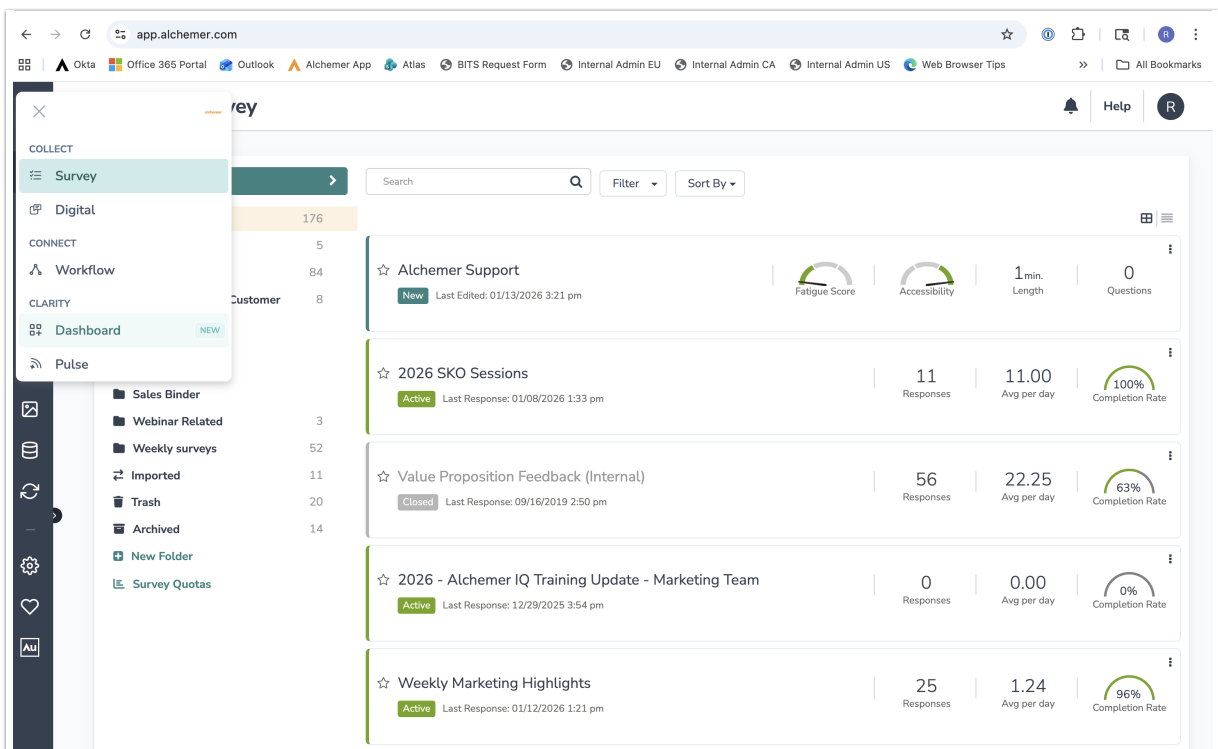
Dashboard in Alchemer Clarity help you visualize, track, and share your feedback data across your team. Whether you're building a standard dashboard or using Spark to create advanced, AI-assisted visualizations, this guide will help you get up and running—fast.

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Access the Dashboard area

Finding the Dashboard icon in the main navigation may not be obvious at first. Here's how to locate it:

1. In the left-hand main navigation, find the grid button, then the **Clarity** section.
2. Click **Dashboard** to open the dashboard workspace.



Step 1: Prepare your data

To create a chart, you first need a dataset. Datasets are built from survey data using selected sources.

1. From the top navigation, click **Data > Sources**.
2. Select the survey(s) you want to include.
3. Click **New Dataset (bottom of the page)**.
4. Once created, go to the **Datasets** tab and click **Refresh**. Your new dataset will now appear.

The screenshot shows the 'Manage Datasets' page in Alchemer Clarity. The page has a navigation bar with 'Overview', 'Dashboards', 'Charts', 'AI Highlights', 'Alerts', 'Data', and 'Pulse'. Below the navigation, there's a 'Manage Datasets' section with a sub-header 'View and manage datasets, or visit the Sources tab to create a new data set from sources.' There are two tabs: 'Datasets' (selected) and 'Sources'. A search bar is present with the placeholder 'Search by datasets name'. Below the search bar is a table with the following data:

<input type="checkbox"/>	Dataset Name	Build	Rows	Last Edited Date	Created By	Most Recent Response Date	
<input type="checkbox"/>	Alchemer Marketing Customer Engagement Survey	New Chart	3	Jan 14, 2026, 9:42 AM	Marketing	Jun 12, 2024, 1:26 AM	...
<input type="checkbox"/>	Customer Research Study June 2024	New Chart	205	Jan 13, 2026, 10:49 AM	rosie.davenport+marketing...	Jul 27, 2024, 1:24 PM	...
<input type="checkbox"/>	2026 SKO Sessions	New Chart	11	Jan 13, 2026, 10:52 AM	rosie.davenport+marketing...	Jan 8, 2026, 1:33 PM	...
<input type="checkbox"/>	Reputation Management Study - Customers & Prospects	New Chart	3,841	Jan 13, 2026, 12:17 PM	bo.bandy@sgizmo.com	Aug 15, 2025, 10:27 PM	...

At the bottom of the table, there is a 'Refresh' button on the left and a pagination indicator '1 to 4 of 4' with navigation arrows on the right.

Tip: A source is your raw survey data. A dataset is a refined view based on selected questions and filters you define from that source.

Step 2: Create your first chart

Once your dataset is ready:

1. Go to the **Charts** tab.
2. Click **New Chart**.
3. Select your dataset and choose the **question labels** you want to visualize. All available data from your survey will display on the left side column.
4. Choose your chart type from the library (bar, line, scatter, pivot, etc.). The chart type will default as a table. Once you have your table set up, then you can change the chart type by selecting the

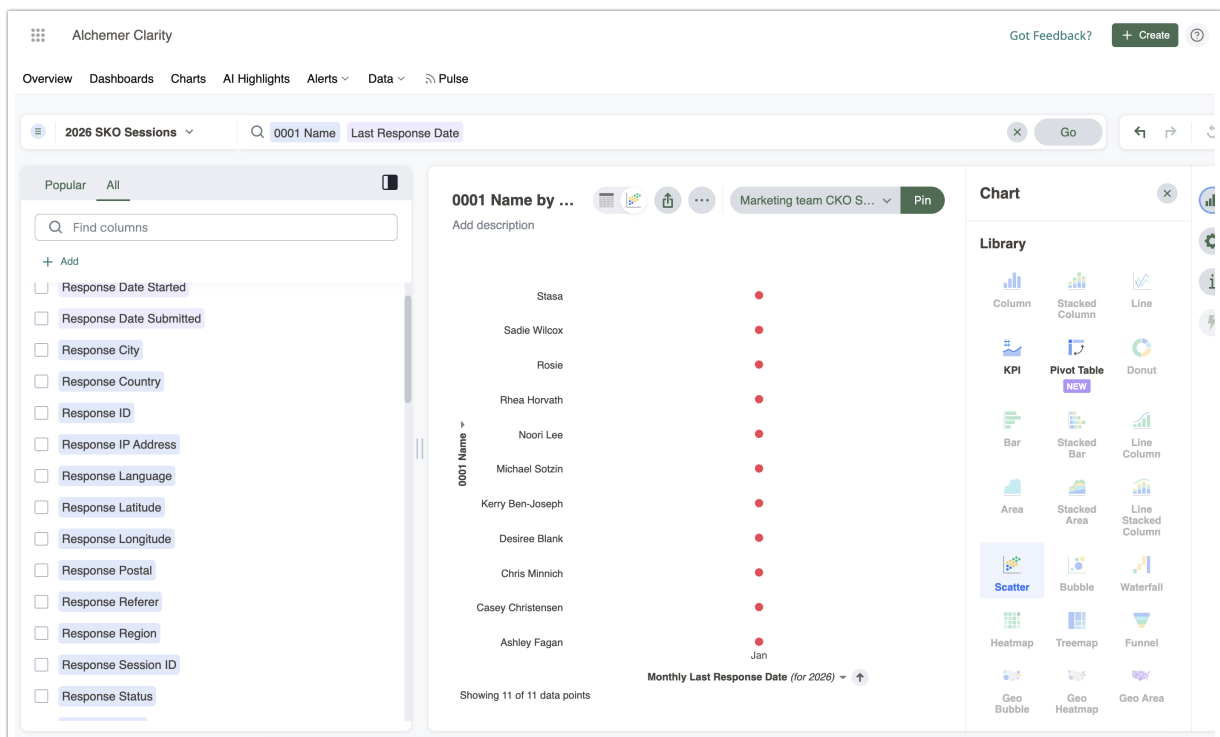
chart type you want.

5. Customize the chart with filters, colors, and descriptions.

Step 3: Pin to your Dashboard

After customizing your chart:

1. Click **Pin** in the chart toolbar.
2. Select the dashboard you'd like to pin it to.
 - If you haven't created a dashboard yet, you'll be prompted to create one.



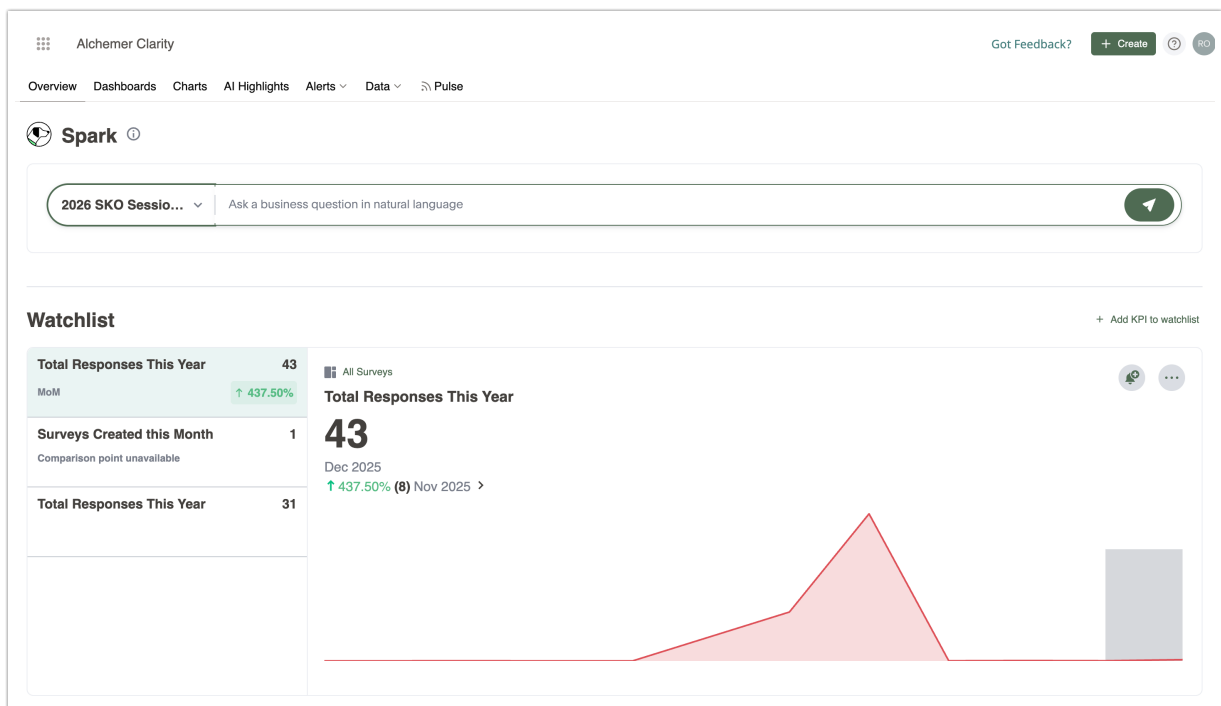
Use Spark for AI-powered dashboards

Want a faster way to build visualizations? Try [Spark](#), our advanced dashboard builder powered by natural language.

This feature is only available to customers who have upgraded to use Advanced Dashboard. If you are interested in upgrading, reach out to your sales rep.

To use Spark:

1. Ensure you've created a dataset.
2. Navigate to the **Overview** tab.
3. Select a dataset from the dropdown.
4. In the Spark input box, ask a business question in natural language (e.g., "Show me a bar chart of NPS scores by month").
5. Spark will create a chart for you instantly.
6. Pin and customize the chart as needed.



Good to know: You can change the chart type after using Spark, just like with manually created charts.

Next steps

Once you've pinned a few charts to your dashboard:

- [Building in Dashboard](#)

Related Articles