

# Waterfall


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## Overview

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Waterfall charts show how an initial value has increased and/or decreased by a series of intermediate values, leading to a final value.

## Waterfall chart data options

 Waterfall

Horizontal Axis

Camp Region

Vertical Axis

Σ

Invoiced Amount - This Year

Color

Start

Σ

Invoiced Amount - Last Year

Animation

Tool Tip

Auto Refresh:

Option	Description
Horizontal Axis	Must be a dimension. This is the category label for the X axis.
Vertical Axis	Must be a metric. This is the category label for the Y axis.
Color	Can be a metric or a dimension. The color field must match the horizontal axis field when a dimension is used.
Start	Must be a metric. This option configures the starting value of the chart.
Animation	Must be a date or time field.

Formatting options

Start column

Chart Series

Series

Invoiced Amount - This Ye...

Start

Color

Total

Sort

Camp Region

Series Settings - Invoiced Amount - Last Year

Series

Aggregation Label

Do not display the aggregation type in front of the field name in labels when an aggregation has been applied in the chart. The labels will just display the field names defined in the report table.

Tooltip Formatting

Use field formatting applied at the chart level on tooltips.

Start Column Style

Use the system default formatting for the start column.

Default

Start Column Title Text

Enable to use a custom title for the start column.

The start column features unique formatting options. For more information, refer to the [Chart Formatting](#) page.

### Total column

Chart Series

Series

Invoiced Amount - This Ye...

Start

Color

Total

Sort

Camp Region

Series Settings

Series

Total Column Style

Use the system default formatting for the total column.

Default

Total Column Title Text

Enable to use a custom title for the total column.

The total column features unique formatting options. For more information, refer to the [Chart Formatting](#) page.

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## Creating a waterfall chart

### 1. Create a new Report

Use your mouse to drag your data from the left panel to the **Columns**, **Sections** and **Filters** fields  
Waterfall charts require one dimension and at least one metric

The screenshot shows the Yellowfin Report Builder interface. The left panel displays a tree view of data sources under 'Ski Team', including Agency, Athlete, Athlete Location, Athlete Payment, Booking, Camp, and various Camp attributes. The main area shows a report with columns for 'Camp Region', 'Invoiced Amount - This Year', and 'Invoiced Amount - Last Year'. The data is displayed in a table format with rows for Asia, Australia, Europe, Latin America, and North America.

Camp Region	Invoiced Amount - This Year	Invoiced Amount - Last Year
Asia	\$132,911,175	\$8,041,002
Australia	\$178,625,085	\$7,489,305
Europe	\$325,682,416	\$20,347,236
Latin America	\$2,651,331	\$1,675,541
North America	\$88,750,931	\$6,860,458

### 2. Click **Charts** to create your chart

The screenshot shows the Yellowfin Report Builder interface with the 'Charts' tab selected. The 'Report Fields' panel on the left lists dimensions (Camp Region) and metrics (Invoiced Amount - This Year, Invoiced Amount - Last Year). The 'Auto Chart' section is active, but a message states: "Looks like you have not selected any data yet. Drag fields from your field list into chart fields." The chart area is empty, and the 'Auto Refresh' toggle is turned on.

### 3. Click **Auto Chart**, then click **Select Chart Type**

The screenshot shows the Yellowfin Report Builder interface with the 'Charts' tab selected. The 'Auto Chart' dropdown menu is open, showing options for 'Auto Chart' and 'Select Chart Type'. A message states: "Looks like you have not selected any data yet. Drag fields from your field list into chart fields." The chart area is empty, and the 'Auto Refresh' toggle is turned on.

The **Select Chart** panel will slide in from the right-hand side of the page

Report / Data / Views / Design / **Visualize**

Report Fields

Search

Dimensions

Camp Region

Measures

Invoiced Amount - This Year

Invoiced Amount - Last Year

Functions

Average

Trend

Forecast

Accumulation

Set Analysis

Variance

Auto Chart

Horizontal Axis

Vertical Axis

Color

Size

Auto Refresh

Looks like you have not selected any data yet. Drag fields from your field list into chart fields.

Select Chart

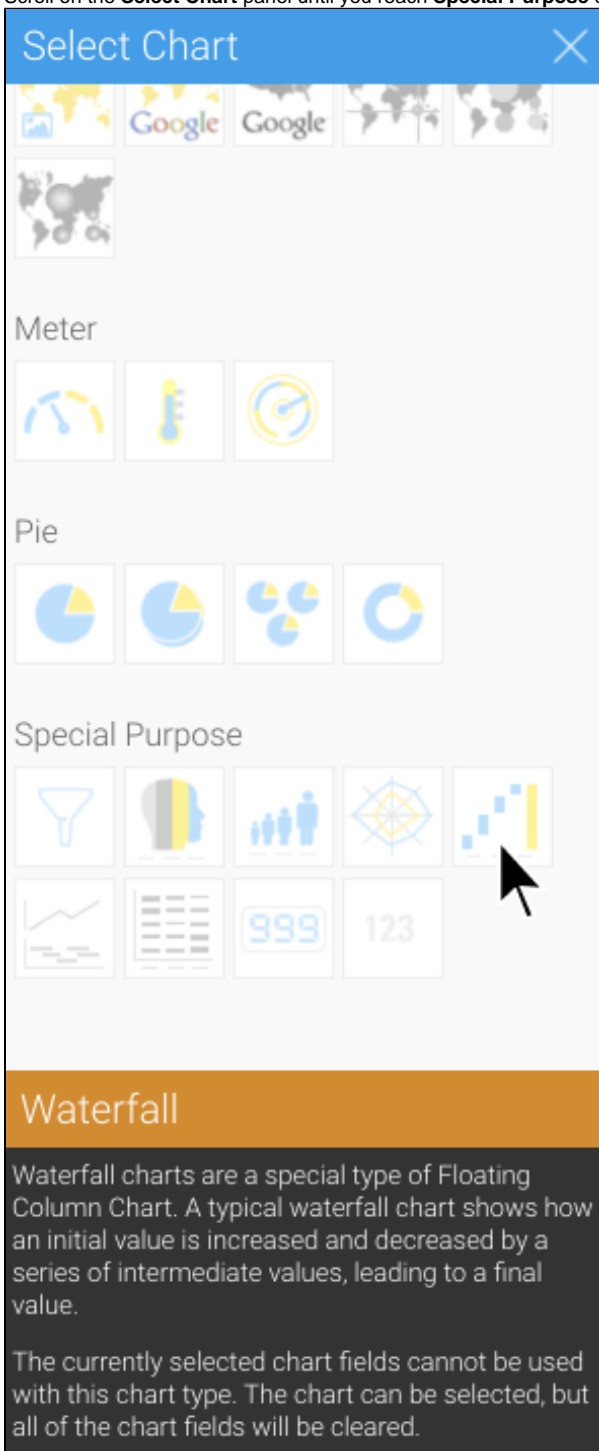
Analytical

Area

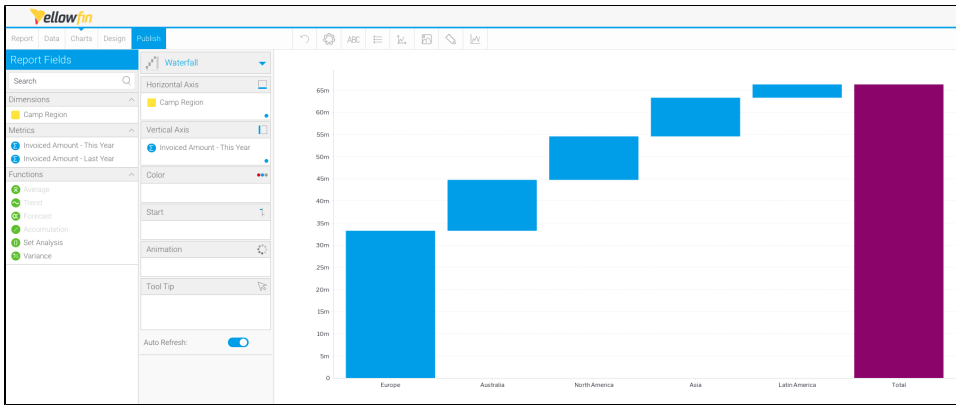
Bar

Column

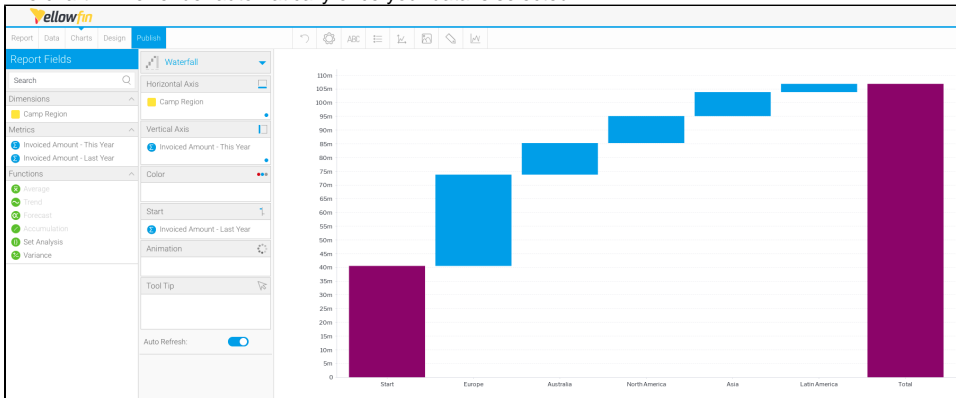
4. Scroll on the **Select Chart** panel until you reach **Special Purpose** charts, and click **Waterfall** as the chart type



5. Use your mouse to drag a **dimension** from the left panel to the **Horizontal Axis** field
6. Use your mouse to drag a **metric** from the left panel to the **Vertical Axis** field  
The chart will render automatically once your data is selected



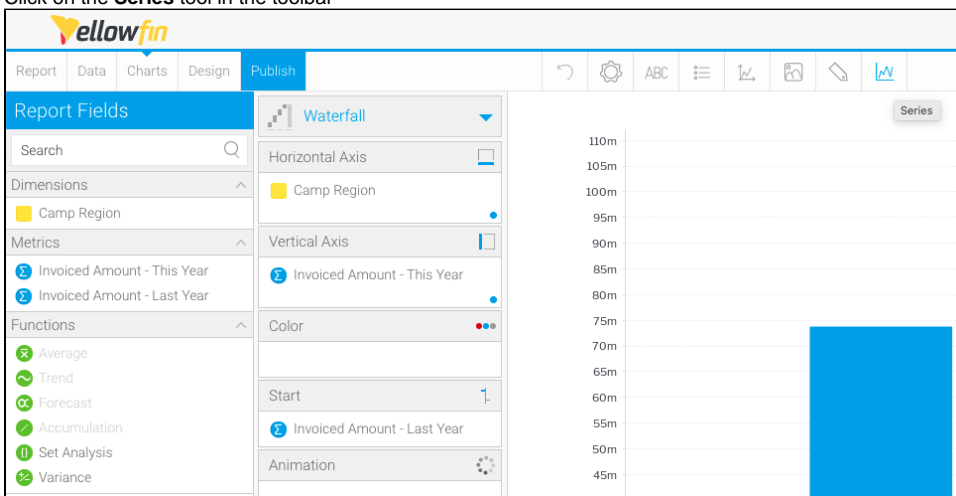
- To add a start column to the chart, use your mouse to drag a **metric** to the **Start** field  
The chart will re-render automatically once your data is selected



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## Adding start and total columns

- Click on the **Series** tool in the toolbar



2. Click on **Start** in the left column, and toggle on the **Start Column Title Text** to customize the start column title

Chart Series

Series

Start

Invoiced Amount - This Ye...

Color

Total

Sort

Camp Region

Series Settings - Invoiced Amount - Last Year

Series

Aggregation Label

Do not display the aggregation type in front of the field name in labels when an aggregation has been applied in the chart. The labels will just display the field names defined in the report table.

Tooltip Formatting

Use field formatting applied at the chart level on tooltips.

Start Column Style

Use the system default formatting for the start column.

Default

Start Column Title Text

Enable to use a custom title for the start column.

Custom Start Column Title Text

Enter your custom start column title text.

3. Click on the text entry field to add your custom title

Chart Series

Series

Start

Invoiced Amount - This Ye...

Color

Total

Sort

Camp Region

Series Settings - Invoiced Amount - Last Year

Series

Aggregation Label

Do not display the aggregation type in front of the field name in labels when an aggregation has been applied in the chart. The labels will just display the field names defined in the report table.

Tooltip Formatting

Use field formatting applied at the chart level on tooltips.

Start Column Style

Use the system default formatting for the start column.

Default

Start Column Title Text

Enable to use a custom title for the start column.

Custom Start Column Title Text

Enter your custom start column title text.

Last year

4. Click on **Total** in the left column, and toggle on the **Total Column Title Text** to customise the total column title

Chart Series

Series

Start

Invoiced Amount - This Ye...

Color

Total

Sort

Camp Region

Series Settings

Series

Total Column Style

Use the system default formatting for the total column.

Default

Total Column Title Text

Enable to use a custom title for the total column.

Custom Total Column Title Text

Enter your custom total column title text.



5. Click the text entry field to add your custom title

Chart Series

Series

Start

Invoiced Amount - This Ye...

Color

Total

Sort

Camp Region

Series Settings

Series

Total Column Style

Use the system default formatting for the total column.

Default

Total Column Title Text

Enable to use a custom title for the total column.

Custom Total Column Title Text

Enter your custom total column title text.

This year

6. Close the **Series Setting** panel by clicking the **X** in the top-right corner  
The chart will re-render automatically and display the custom start and total column titles

