How to Create a Dashboard Card

Opportunity Administrators and Budget Approvers can create up to eight of their own custom dashboard cards from any grid view in the system. This allows you to display information on your dashboard that you find most useful to your tasks. Once created, clicking these cards will act as a shortcut to take you directly to the customized grid view. Dashboard cards are your personal cards that you can add, delete and rearrange and a great way to simplify and organize your workflow.

Upon logging in and visiting the dashboard for the first time, Opportunity Administrators and Budget Approvers will see a page with some brief instructions for creating a custom dashboard card. These instructions will display until they create their first custom dashboard card and if all cards are hidden or deleted. You can view the following Blackbaud article for more detailed information: [https://kb.blackbaud.com/articles/Article/121402](https://kb.blackbaud.com/articles/Article/121402)

A custom dashboard card can be created from any grid in the system. When on a grid, click on the “Change Visible Columns” icon to add/remove visible columns. Once you have filtered and rearranged your columns to display the desired information, click on the “Create a Dashboard Card” icon to create a card.

You will then be prompted to assign a name to the new dashboard card that is being created.
Once you click “Create”, a message will appear at the top of the screen indicating that the new card has been created. Click the link to view the card.

You can then use the card as a shortcut by clicking on it from your dashboard, and the system will take you directly to the custom grid you created.

Creating a dashboard card is not the same as creating a new view. Views are public for that grid and do not need to be created before creating a dashboard card.