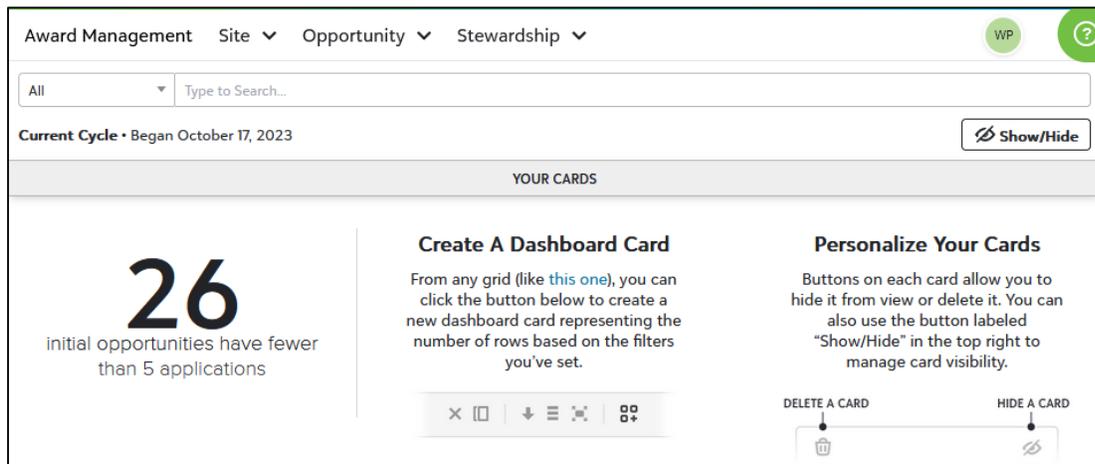


How to Create a Dashboard Card

Opportunity Administrators and Budget Approvers can create up to eight (8) 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 are 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:

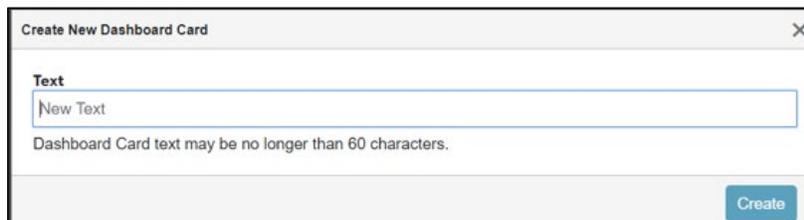
<https://kb.blackbaud.com/articles/Article/121402>



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.



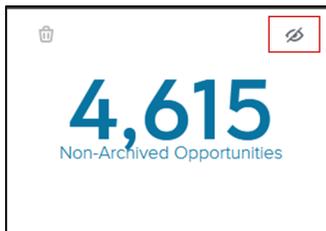
You will then be prompted to assign a name to the new dashboard card that is being created.



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 return to your dashboard where you can then utilize the new card. From there, it can be used as a shortcut by clicking directly on the card. This will take you to the custom grid view you created.

Note that creating a **Dashboard Card** and creating a **View** are different. A **View** does not offer a shortcut from the dashboard but can be set up for any grid to create a default order of columns, filters, and sorts.

To remove a card from the home page but save it, hover on the card and click the “eyeball” icon in the top right corner.



To add the card back to the home page, click the **Show/Hide** button in the top right corner of the screen then select or deselect cards as desired.

To delete a card and completely remove it from your site, hover over the card and click the “trash” icon in the top left corner. This cannot be undone.



Icon Legend:

-  Download report
-  Change visible columns
-  Create a new dashboard card from the current grid state
-  Create new view from the current grid state
-  Save current view
-  Delete saved view
-  Make current view the default