




FILTERING DASHBOARDS

One Dashboard For Many Viewers

Filters on a dashboard allow you to choose different views of data. As an administrator, you don't need to clone dashboards along with source reports for each subset of data. With a single filtered dashboard, you can serve data needs for a wider audience. Filters are available for both dynamic and standard single-user dashboards. When you filter a Salesforce Classic dashboard, the filtered view is preserved so that the next time you see the dashboard, data is filtered by the same view. In Lightning Experience, dashboards always open with no filters applied.

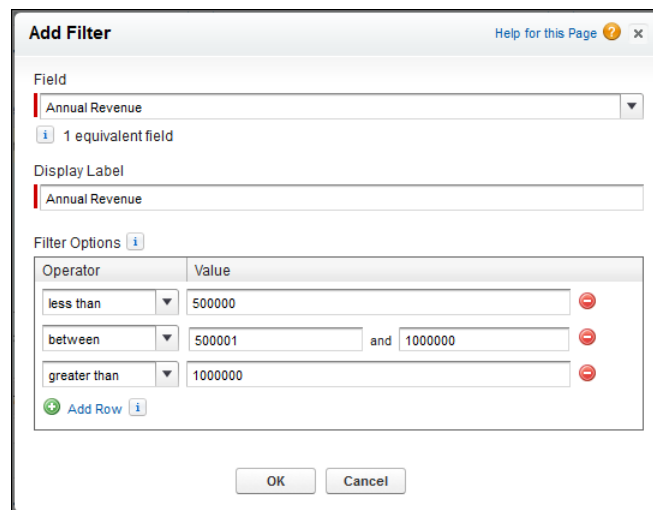
Each dashboard can have up to 3 filters. Contact Salesforce to increase the filter options limit. A maximum of 50 filter options is possible.


 **Note:** There are some things you can't do with dashboard filters.



- Filters can't be added to dashboards that contain Visualforce or s-control components.
- It's not possible to filter on bucket fields. However, it is possible to use a report filtered on a bucket field on the dashboard page.
- Filters aren't applied when you schedule or email a dashboard.
- You can't filter data on a joined report in dashboard view or add a filter to a dashboard that only has joined reports.
- You can't use custom formula fields in a dashboard filter.
- In Lightning Experience, you can't edit filtered dashboards, which means you can't add new dashboard filters. (You can change existing filters while viewing the dashboard, though!) Switch to Salesforce Classic to edit filtered dashboards.

Creating Dashboard Filters


To create a filter, Click **Add Filter** and select the field to filter on from the **Field** drop-down. See "Add a Dashboard Filter" in the Salesforce Help.








Add Filter [Help for this Page](#) 

Field
Annual Revenue 
 1 equivalent field

Display Label
Annual Revenue

Filter Options 

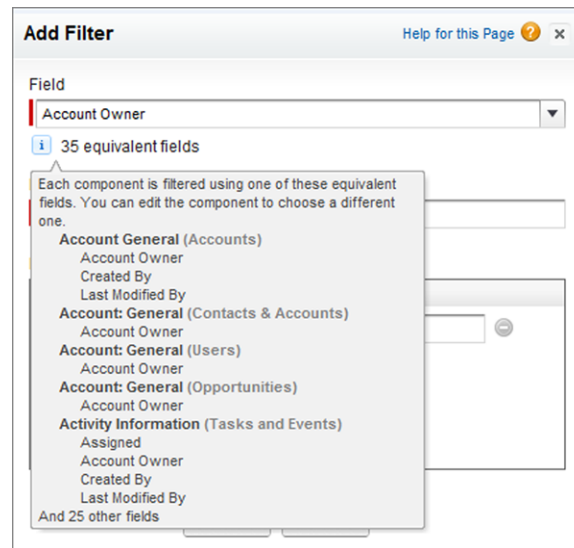
Operator	Value
less than	500000 
between	500001 and 1000000 
greater than	1000000 

 Add Row 

OK Cancel

Equivalent Fields

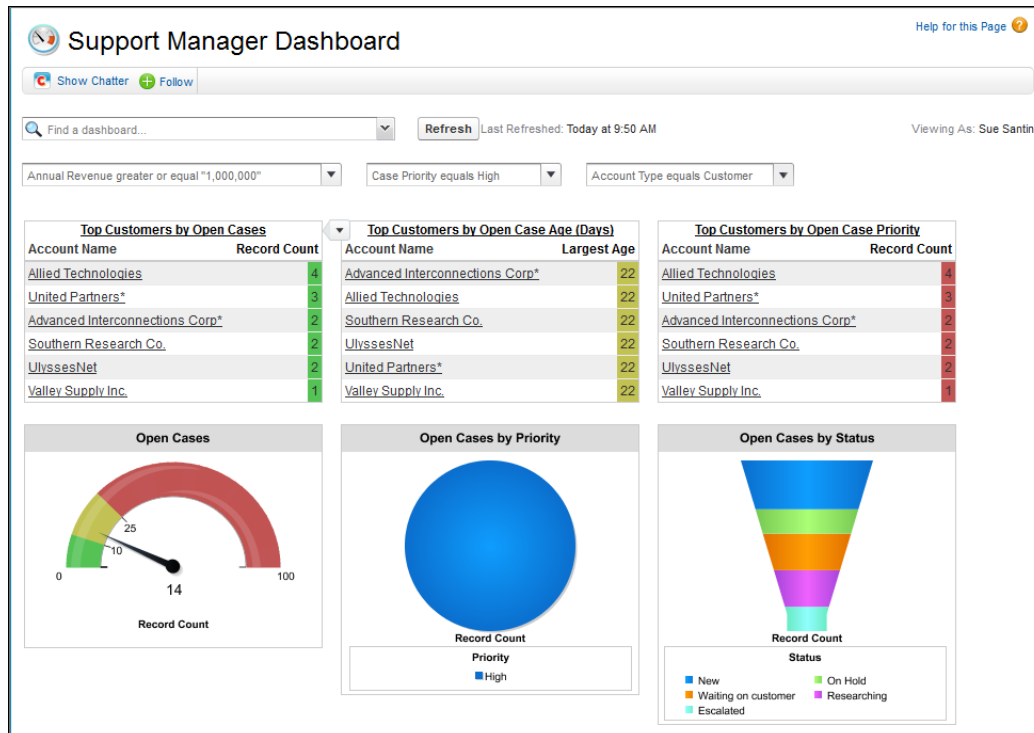
The field you select for the filter may have *equivalent fields*. Equivalent fields share the same underlying object as the field you select for the filter. You can use equivalent fields to filter components that don't have the exact field you selected for the filter, or to filter some components differently. For example, if you filter on the `Account Owner` field, equivalent fields may include `Opportunity Owner` or `Opportunity Created By`, as all three are part of the `User` object.



Examples

Support Manager Dashboard

You can use a filtered dashboard to track support cases for different types of customer. By using a dashboard with filters on `Annual Revenue`, `Case Priority`, and `Account Type`, your support organization can make sure that high-value customers with high-priority cases are getting the attention they need. Creating a dynamic dashboard means that one dashboard can be used throughout the organization by managers (and even reps). The figure below shows the Support Manager Dashboard filtered to show data for customers whose annual revenue is greater than or equal to \$1 million and who have open, high-priority support cases.



Sales Performance Dashboard

You can show how different types of deals are performing across different account segments by creating a dashboard with two filters. Create a filter for **Annual Revenue** that contains several ranges that reflect how your organization segments accounts, and then create a filter on **Opportunity Type**. Create this as a dynamic dashboard to let the entire sales organization use it: managers can use it to view the performance of their teams, while reps can use it to monitor their own performance.

