**If at first you don't succeed, Reset your Bookmarks!**

A new dashie gets released and everyone is having a grand old time! Everyone except you, of course.

For some reason, your dashie is showing you all sorts of wonky data that you KNOW is wrong. You've checked the Salesforce record, you've tried refreshing, and yet nothing seems to work.

Well... your dashie might just be suffering from a mild case of the bookmarkies. But don't worry! The Data & Tech team is here to get you out of this tricky predicament.

Follow this step by step tutorial to bring back the life into your new dashie

You can also watch the video guide and follow along that way

**[Meeting w\_Emelda-20220128\_112028-Meeting Recording.mp4](https://tbl500amory-my.sharepoint.com/:v:/g/personal/ksordia_bottomline_org/EY52DZdzyZBAmGrHUxhZUEUBK5fzstCj1pEdiX8hOa3U1A?e=Cj7KbB" \t "_blank)**

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**How to Properly reset Dashboard Bookmarks**

This quick step-by-step tutorial is meant to show you how to fix bookmark problems

* The first thing you have to do is **make sure you are in the dashboard you are trying to reset.**  
    
  For example, if your data is not showing up correctly in the Advisor Caseload Dashboard, you have to reset your bookmarks in the Advisor Caseload Dashboard.  
    
  Although they are all part of the same Power BI app, each dashie works independently and has its own bookmarks. So, before you follow these steps, **start from the dashboard you are trying to reset.**
* Once you are in the right dashie, **locate the RESET button.**  
    
  The Reset button is the first button from left to right, and is **located in the top right-hand menu of your Power BI app.**You will know it is the right button because the text "Reset filters, slicers, and other data view changes you've made" will be displayed when you hover over it.

Hovering over the button will display text that reads: "Reset filters, slicers, and other data view changes you've made"

* **Be careful not to confuse the "Reset" button with the "Refresh" button**. They look quite similar, but they do different things.   
    
  ​​​​​​​The Refresh button is the fourth button from left to right, and is also located in the top right-hand menu of your Power BI app. **Clicking the refresh button will NOT solve this problem.** Make sure you are clicking the right button!

Reset Button is the First from Left to right.

* After you click the Reset button, **a pop-up window will show up asking if you want to reset filters,** slicers, and other data view changes you've made. The correct choice is highlighted for you in yellow and says "Reset"

Clicking the Reset button will clear ALL personalized AND pre-set bookmarks, returning your dashie to its default state

* You'll know the reset worked by looking at the Reset button itself. After the dashie has been properly reset, **the Reset button will go from being white to being grey**

Reset Button BEFORE a reset

Reset Button AFTER a successful reset

* **Once your dashie has returned to its default state,** it is time for you to**select** whatever choices you'd like to include in **your personalized bookmark.** For this example, I will be choosing to bookmark all the students with 0 Spring engagements in the MA region.

Select the conditions for your new (or updated) bookmark. In this example, I clicked the Spring toggle, chose the MA region, and selected 0 for Spring Engagements

* Next, you'll **click the "Personal Bookmarks" button**. You'll know you clicked the right button when a menu that says "Personal Bookmarks" opens up.

Clicking the "Personal Bookmarks" button will open up a menu that will allow you to either update or create a new bookmark

* If you want to**UPDATE an existing bookmark**, find the name of your bookmark and **click the ellipsis next to your bookmark's name**

Clicking the ellipsis next to your existing bookmark will show the options to update it

* Clicking the ellipsis will give you the option to update, clear, rename, or delete your bookmark. **You want to select "Update" to make sure your bookmark is updated with your newly selected options.**

Clicking the ellipsis will display an additional menu. Select the "Update" option and your bookmark will be updated with your new settings

* If you want to **CREATE a new bookmark, click "Add a personal bookmark"**

Click the "Personal Bookmarks" button. Then select "Add a personal Bookmark"

* **Name your new bookmark.** You can also choose to make it your default view, so that it will automatically become the screen that you see every time you come back to this dashboard

Clicking "Add a personal Bookmark" will give you the option to name your bookmark. You can also make it your default view.

* After you are done creating or resetting your bookmarks, you can refresh your browser as an additional measure. You can do this in two different ways:
  + Press your Fn button, then press the F5 key
  + Press CTRL + R

Those are all the steps! If you have any additional questions, or if you would like more guidance, please do not hesitate to contact your friends in the Data & Tech team through the ticketing system or through the appropriate Teams Channels