

Action Features in the Dashboard

Objective: To create a Filter action that will filter the profit chart based on your selection on any part of the sales chart

Tools required: Tableau Desktop

Prerequisites: None

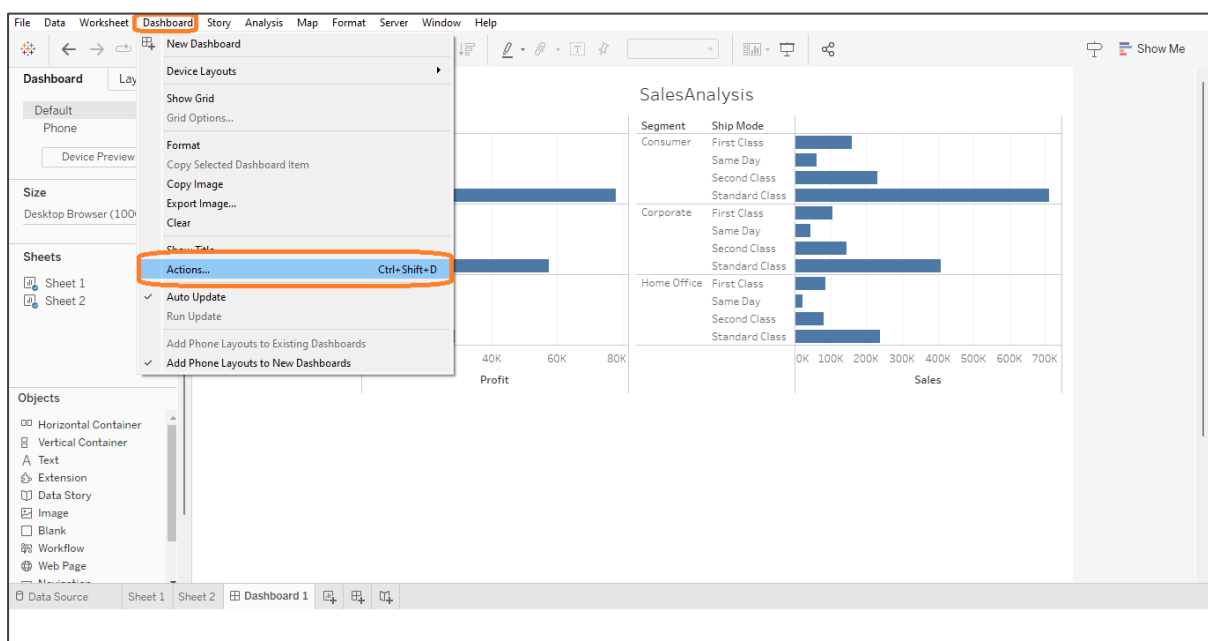
Note: Continue the dashboard created in Demo 01

Steps to be followed:

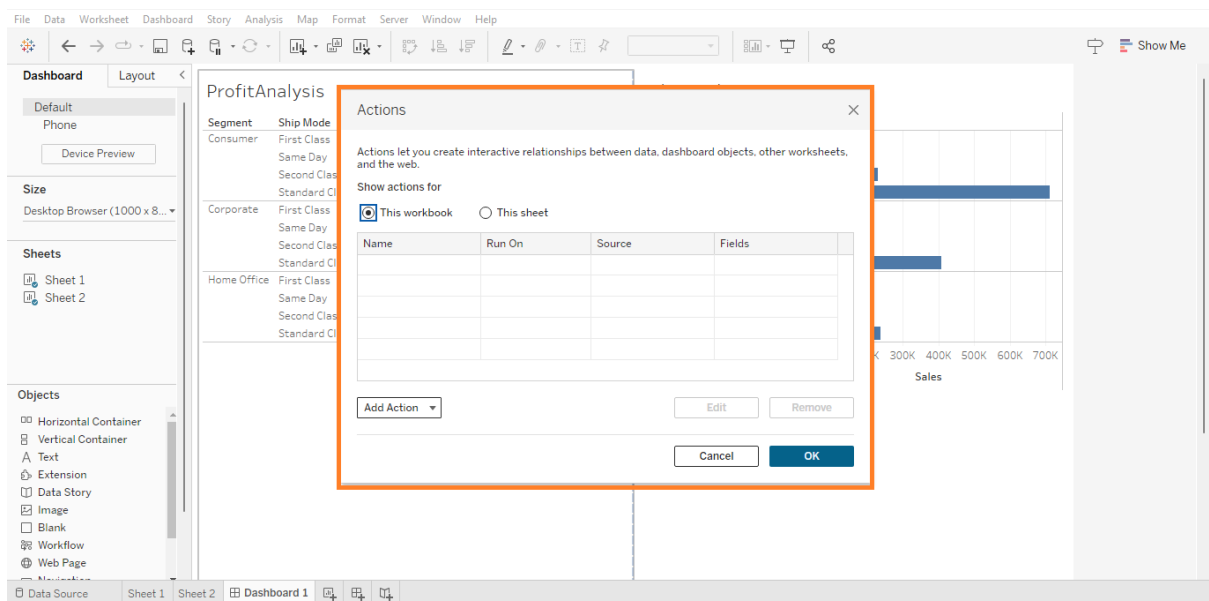
1. Add an Action
2. Add a Filter action

Step 1: Add an action

1.1 Go to **Dashboard** in the menu and click on the **Actions** option

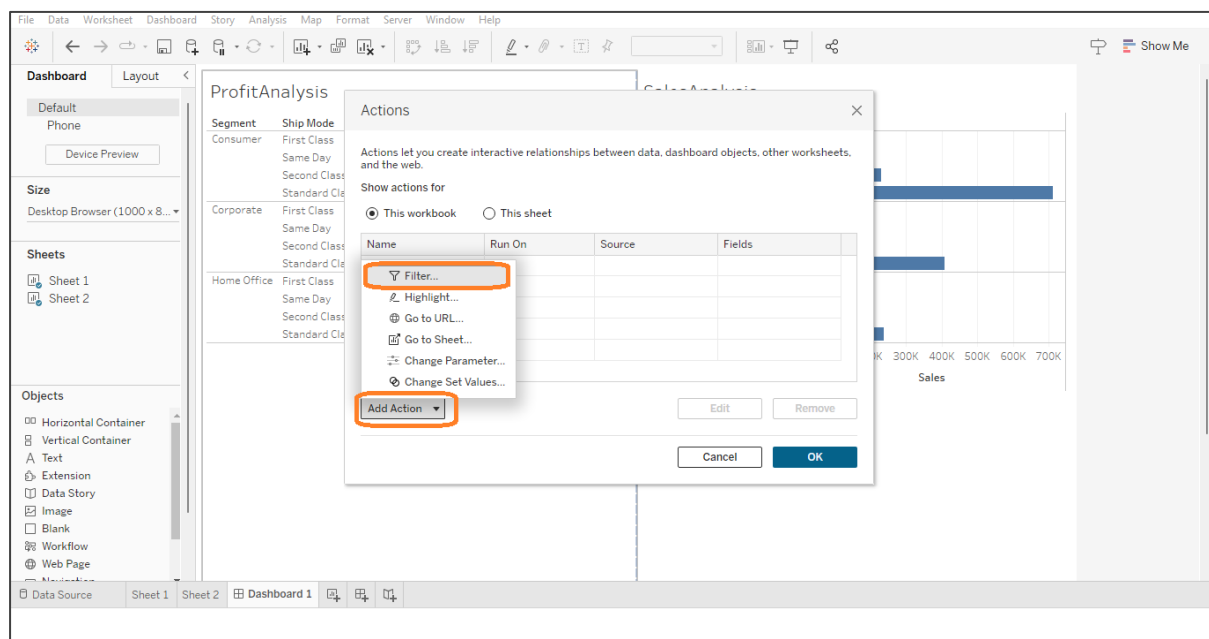


An **Actions** window will open as given below.

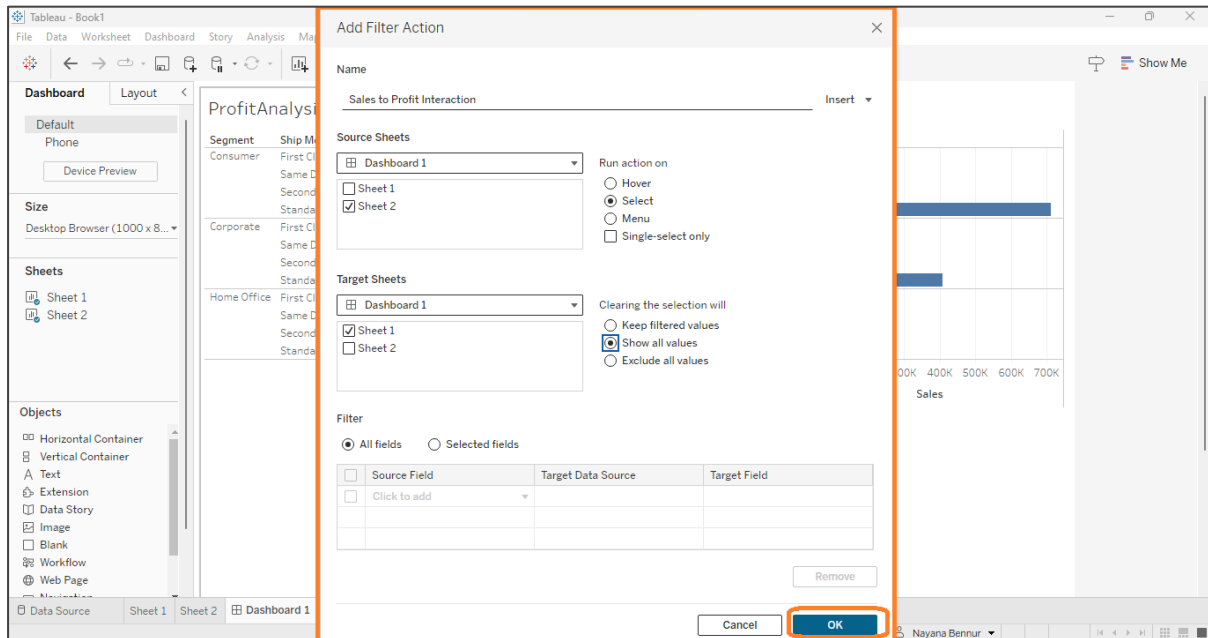


Step 2: Add a filter action

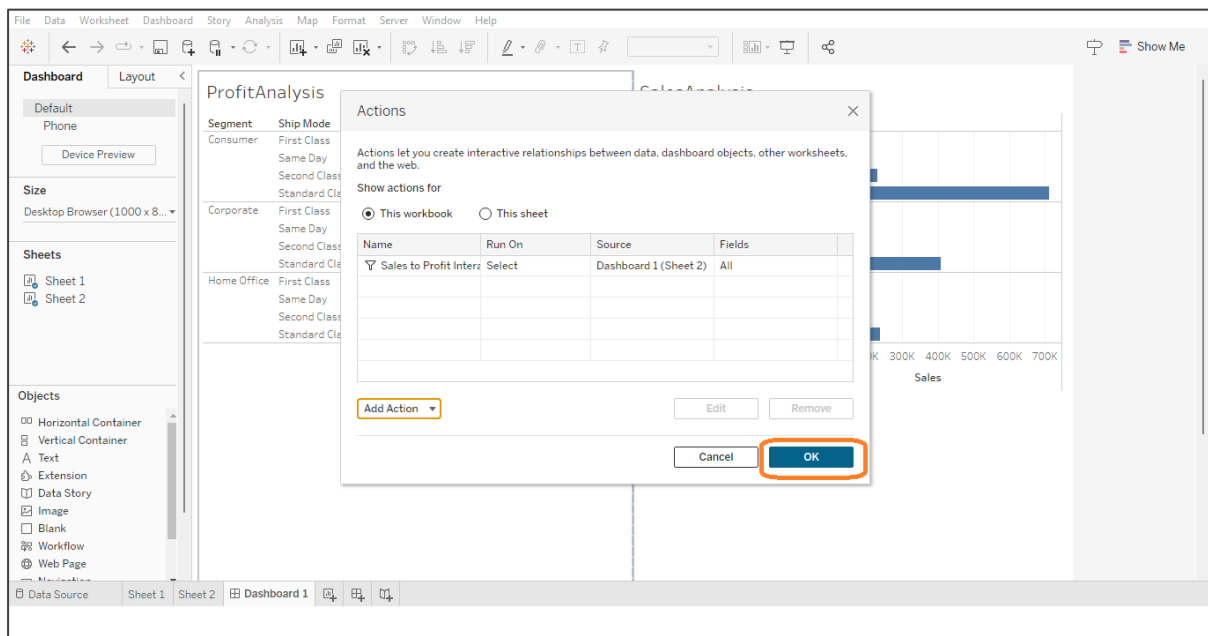
2.1 Click on **Add Action** dropdown and select **Filter**



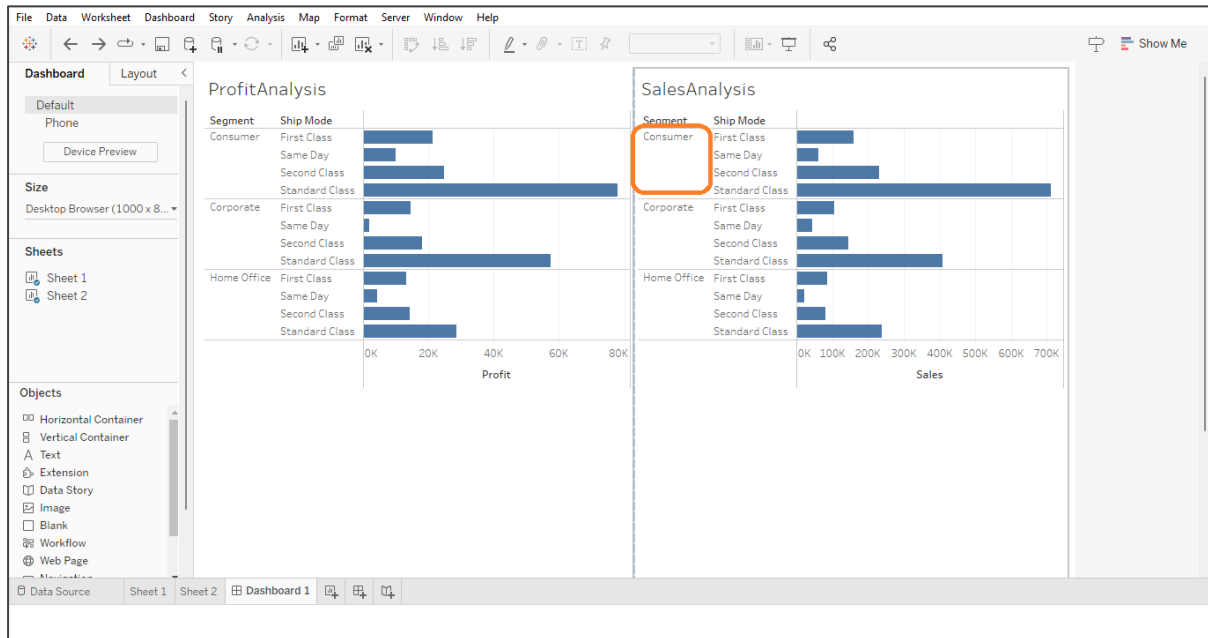
2.2 Name the Filter action as **Sales to Profit Interaction**, select the Source Sheets as **Sheet 2**, Run action on as **Select**, Target Sheets as **Sheet 1**, and **Clearing the selection will** as **Show all values**. Then, click on **OK**



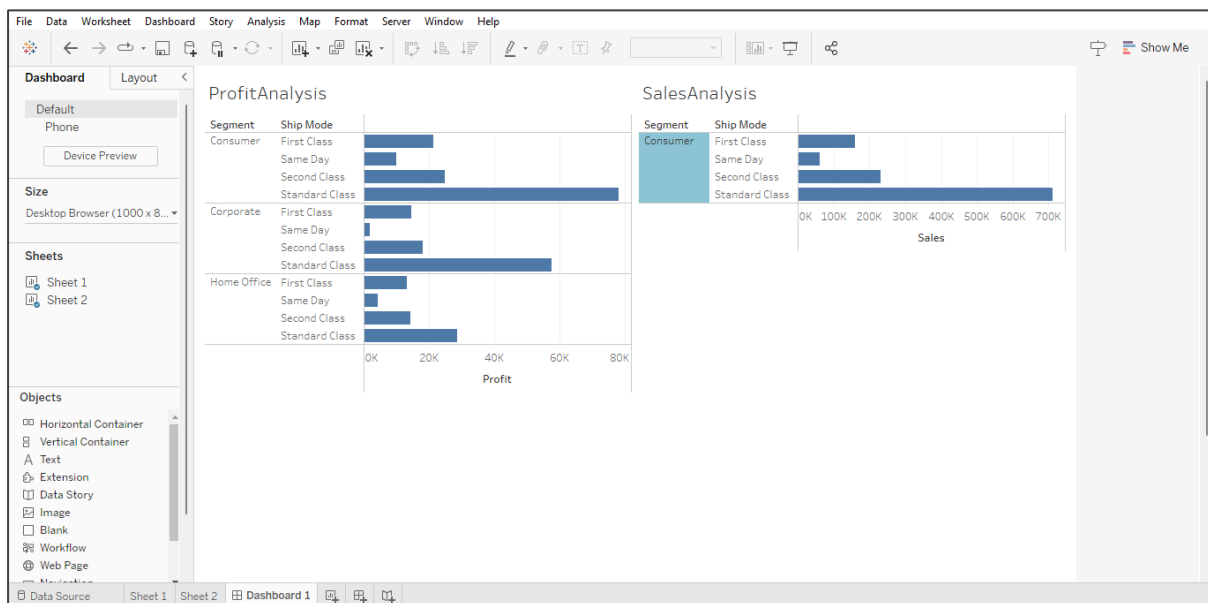
2.3 Click on **OK** to close the actions table



2.4 Click on the **Consumer** segment in the **SalesAnalysis** chart in the dashboard. The corresponding segment will only be visible in the **SalesAnalysis** chart in the dashboard.



The output will appear as shown below:



With these steps, you have successfully created a Filter action that will filter the profit chart based on your selection on any part of the sales chart.