

Duplicate the Layout

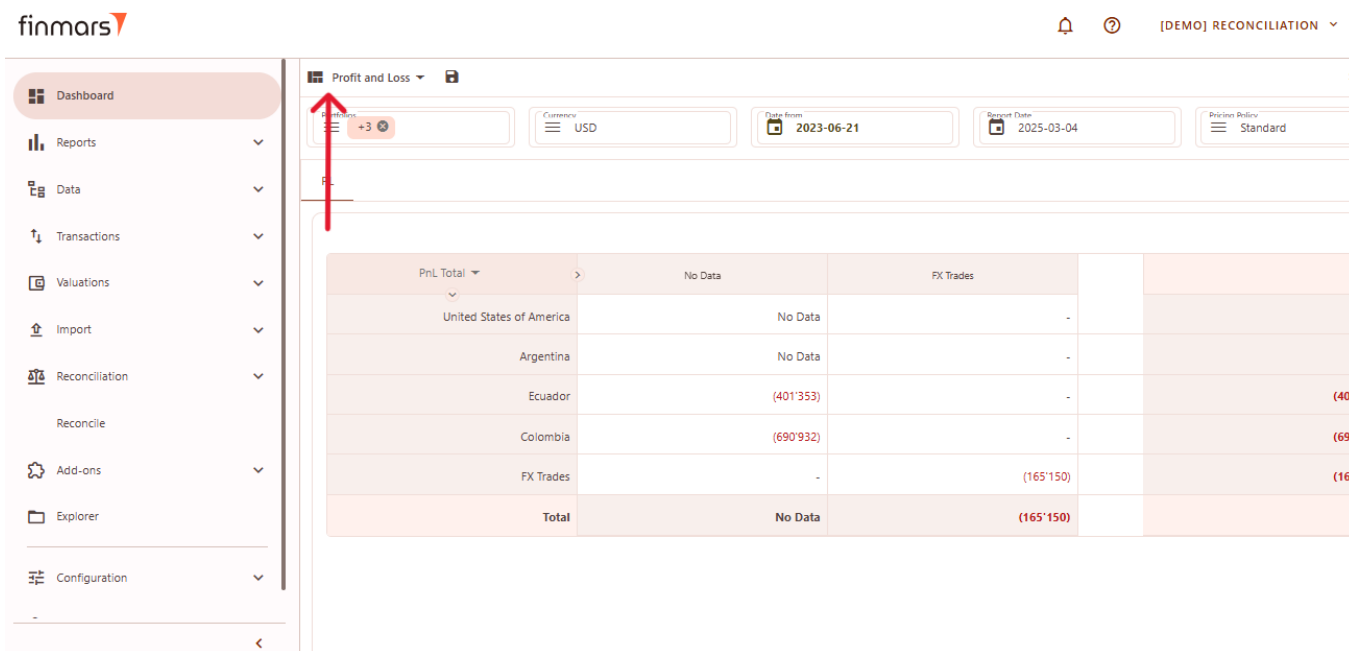
Prerequisites

We assume you have all prerequisites you may need, including:

1. [Get Access to Finmars](#)
2. [Link with Finmars ID](#)

Duplicate the Layout

1. Go to the layout list. Click on the layout name to open the dropdown menu. Choose the layout you want to duplicate (for example, **Profit and Loss**).



The screenshot shows the Finmars interface with a sidebar on the left and a main content area. The sidebar contains a navigation menu with items: Dashboard, Reports, Data, Transactions, Valuations, Import, Reconciliation, Add-ons, Explorer, and Configuration. The main content area displays the 'Profit and Loss' layout. At the top, there is a header with the Finmars logo, a notification bell, a help icon, and a dropdown menu labeled '[DEMO] RECONCILIATION'. Below the header, there are several filters: 'Currency' set to 'USD', 'Date from' set to '2023-06-21', 'Report Date' set to '2025-03-04', and 'Principles Policy' set to 'Standard'. The main content area shows a table with columns for 'PnL Total', 'No Data', and 'FX Trades'. The table has rows for 'United States of America', 'Argentina', 'Ecuador', 'Colombia', 'FX Trades', and 'Total'. The 'Total' row shows a value of '(165'150)'. A red arrow points to the dropdown menu icon next to the 'Profit and Loss' layout name.

PnL Total	No Data	FX Trades		
United States of America	No Data	-		
Argentina	No Data	-		
Ecuador	(401'353)	-		(40
Colombia	(690'932)	-		(69
FX Trades	-	(165'150)		(16
Total	No Data	(165'150)		

2. In the dropdown menu, select **"Make a Copy"** to create a duplicate of the selected layout.

The screenshot shows the finmars application interface. On the left is a navigation sidebar with categories like Dashboard, Reports, Data, Transactions, Valuations, Import, Reconciliation, Add-ons, Explorer, and Configuration. A dropdown menu is open, listing actions such as Collateral, Configuration Helper, Maturity, Overview, Profit and Loss, Save, Open, **Make a copy**, Edit Dashboard Layout, Export, Select from list, Invites (0), Rename, Share, Make default, and Delete. A red arrow points to the 'Make a copy' option. In the background, a reconciliation table is visible with columns for 'No Data' and 'FX Trades', and rows for various categories with numerical values.

3. To confirm that the copy was successfully created, check the selected layout name at the top. It should indicate that it is a copy (e.g., **Profit and Loss_copy**).

The screenshot shows the finmars application interface after creating a copy. The top navigation bar now displays 'Profit and Loss_copy' with a dropdown arrow. A red arrow points to this text. Below the navigation bar, there are filters for 'Date from' (2023-06-21) and 'Report Date' (2025-03-04). The main content area shows a table with columns for 'No Data' and 'FX Trades', and rows for 'United States of America', 'Argentina', 'Ecuador', 'Colombia', 'FX Trades', and 'Total'. The values in the table are: United States of America (No Data, No Data), Argentina (No Data, -), Ecuador (401'353, -), Colombia (690'932, -), FX Trades (-, (165'150)), and Total (No Data, (165'150)).

4. After copying, you can **Rename** the new layout for clarity and organization. Click on the **Rename** option.

The screenshot shows the finmars application interface. On the left is a navigation sidebar with categories like Dashboard, Reports, Data, Transactions, Valuations, Import, Reconciliation, Add-ons, Explorer, and Configuration. The main area displays a 'Profit and Loss' report for the period 2023-06-21 to 2025-03-04. A context menu is open over the report, listing actions such as Save, Open, Make a copy, Edit Dashboard Layout, Export, Select from list, Invoices (0), **Rename** (highlighted with a red arrow), Share, Make default, and Delete.

	No Data	FX Trades	
	No Data	-	
	No Data	-	
	(401'353)	-	(401'353)
	(690'932)	-	(690'932)
	-	(165'150)	(165'150)
	No Data	(165'150)	(165'150)

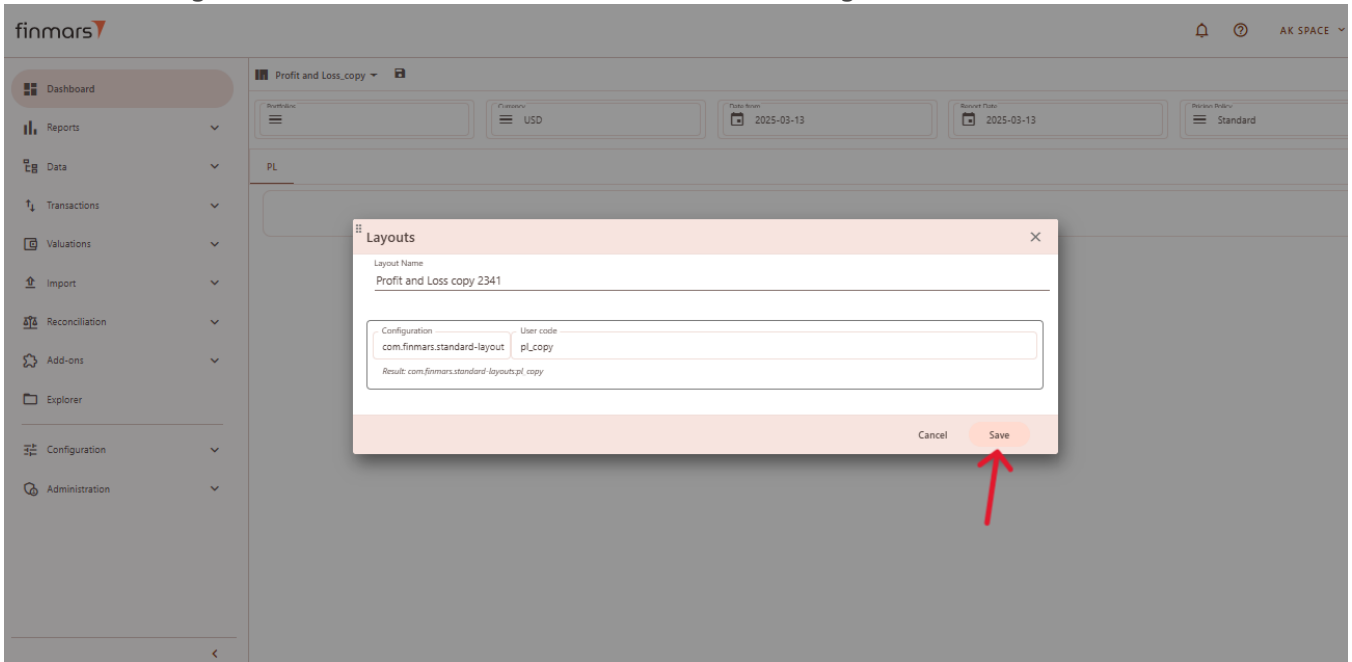
5. A dialog box will appear where you can enter any desired name for the copied layout. Also, you can change configuration and user code.

The screenshot shows the finmars application interface with a 'Layouts' dialog box open. The dialog box has a title bar 'Layouts' and a close button. It contains the following fields:

- Layout Name: Profit and Loss_copy
- Configuration: com.finmars.standard-layout
- User code: pLcopy

Below these fields, it shows the result: Result: com.finmars.standard-layouts:pLcopy. At the bottom right of the dialog are 'Cancel' and 'Save' buttons. A red arrow points to the 'Layout Name' field.

6. After choosing a new name, click **Save** to confirm the changes.



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