

How to Duplicate the Layout

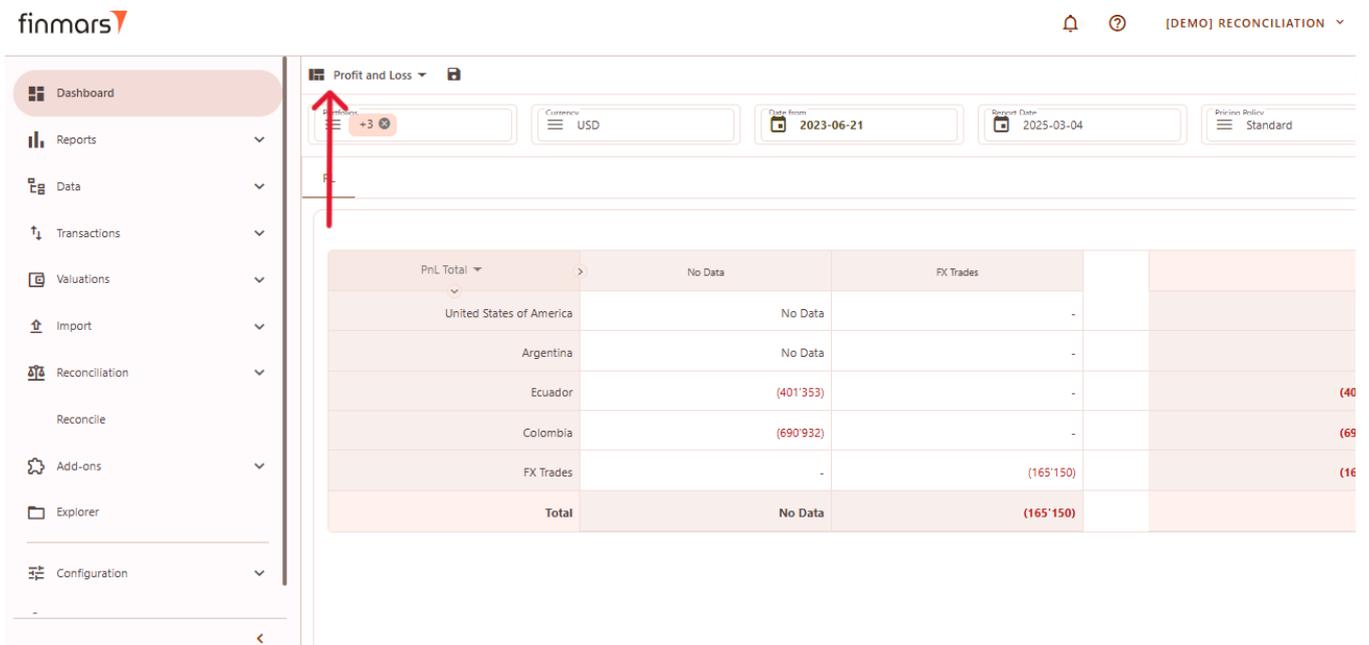
Prerequisites

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

1. If needed: the VPN is configured to access the Finmars resources
2. If needed: access to the Virtual Machine to work with the sensitive information
3. Must have: registered in Finmars in the needed region environment (self-registered or registered by Finmars)
4. Must have: having permissions set to allow continue with the Action in the Guide

Duplicating 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 includes options like Dashboard, Reports, Data, Transactions, Valuations, Import, Reconciliation, Add-ons, Explorer, and Configuration. The main content area displays a 'Profit and Loss' report for the period from 2023-06-21 to 2025-03-04. A red arrow points to the dropdown menu icon next to the 'Profit and Loss' title.

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 dashboard with a dropdown menu open. The menu items are: Collateral, Configuration Helper, Maturity, Overview, Profit and Loss, Save, Open, Make a copy (highlighted with a red arrow), Edit Dashboard Layout, Export, Select from list, Invites (0), Rename, Share, Make default, and Delete. The background shows a reconciliation table with columns for 'No Data' and 'FX Trades'.

	No Data	FX Trades		
	No Data	-		
	No Data	-		
	(401'353)	-		(40
	(690'932)	-		(69
	-	(165'150)		(16
	No Data	(165'150)		

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 dashboard with the 'Profit and Loss_copy' layout selected. A red arrow points to the dropdown menu at the top left of the main content area, which now displays 'Profit and Loss_copy'. The background shows a reconciliation table with columns for 'No Data' and 'FX Trades'.

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

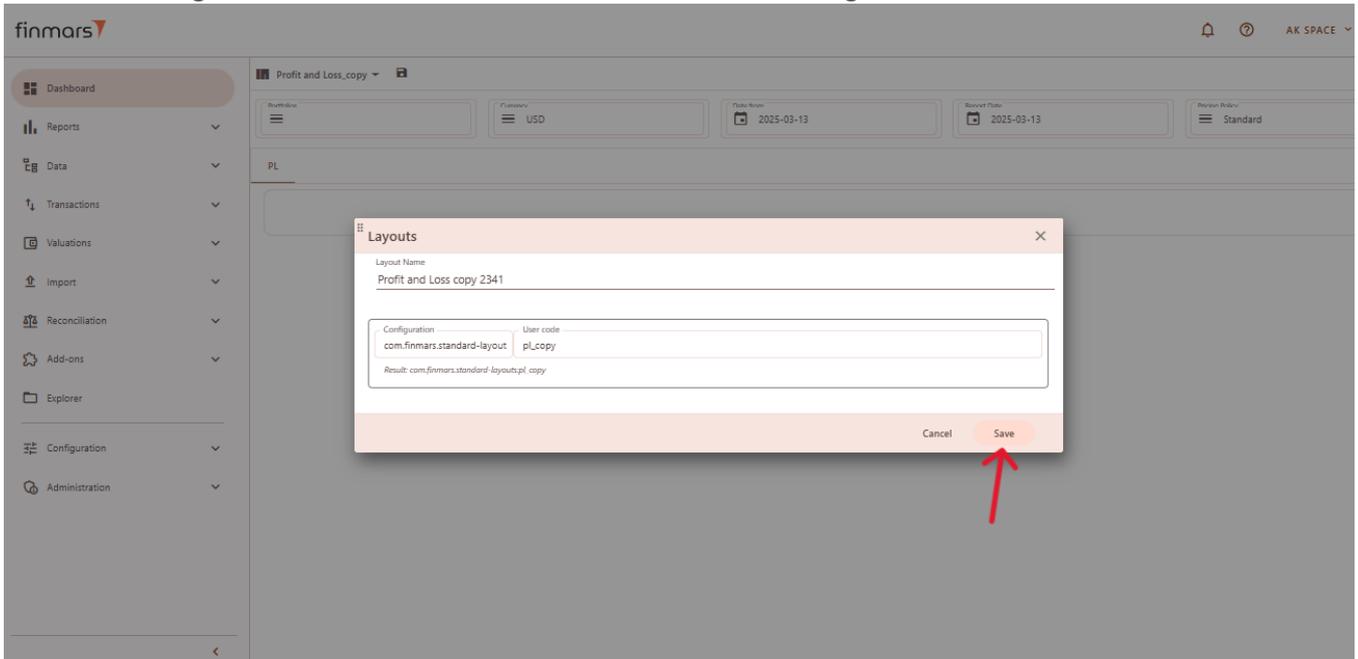
4. After copying, you can **Rename** the new layout for clarity and organization. Click on the **Rename** option.

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 report titled 'Profit and Loss' with filters for 'Date from' (2023-06-21) and 'Report Date' (2025-03-04). A table with columns 'No Data' and 'FX Trades' is visible. A context menu is open over the table, 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.

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 a 'Layout Name' field with the text 'Profit and Loss_copy'. Below this is a 'Configuration' field with the text 'com.finmars.standard-layout' and a 'User code' field with the text 'pLcopy'. A 'Result' field shows 'com.finmars.standard-layouts:pLcopy'. At the bottom 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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