

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**).

finmars 🔔 ? [DEMO] RECONCILIATION ▼

Dashboard

Reports

Data

Transactions

Valuations

Import

Reconciliation

Reconcile

Add-ons

Explorer

Configuration

Profit and Loss ▼

+3

USD

2023-06-21

2025-03-04

Standard

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.

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Explorer

Configuration

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

Delete

[DEMO] RECONCILIATION

2023-06-21

2025-03-04

Standard

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

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Profit and Loss_copy

+3

USD

2023-06-21

2025-03-04

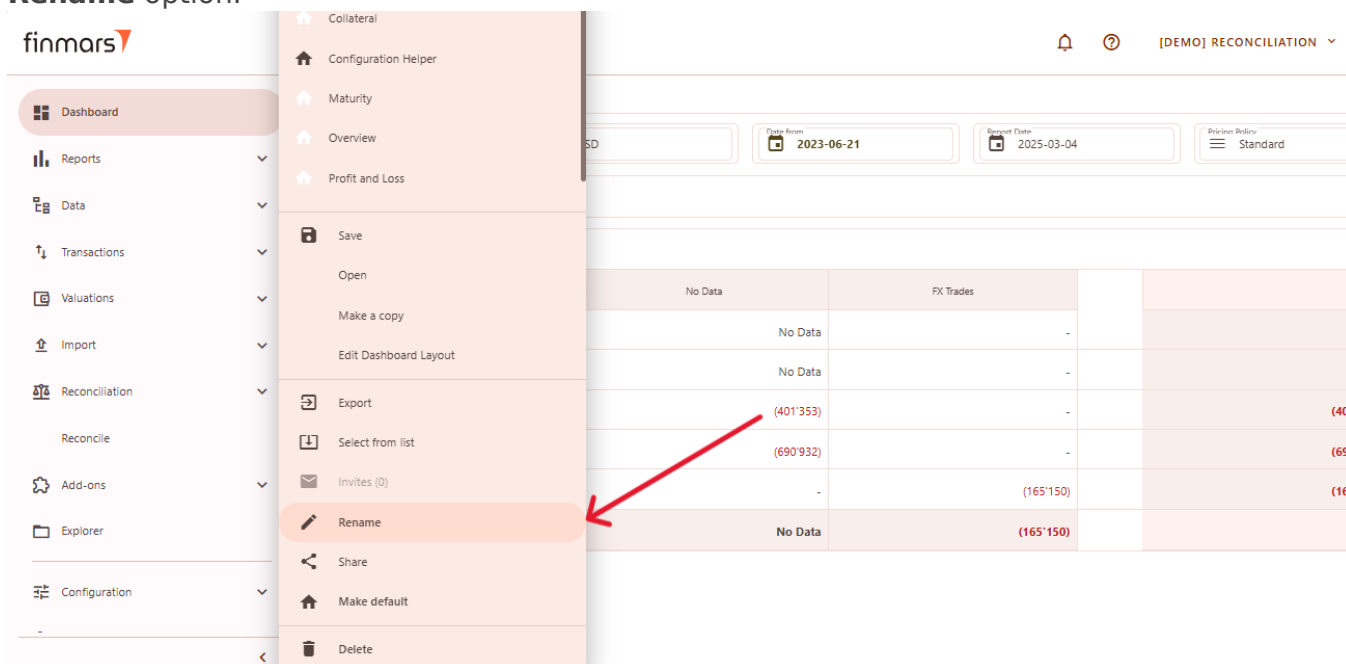
Standard

PL

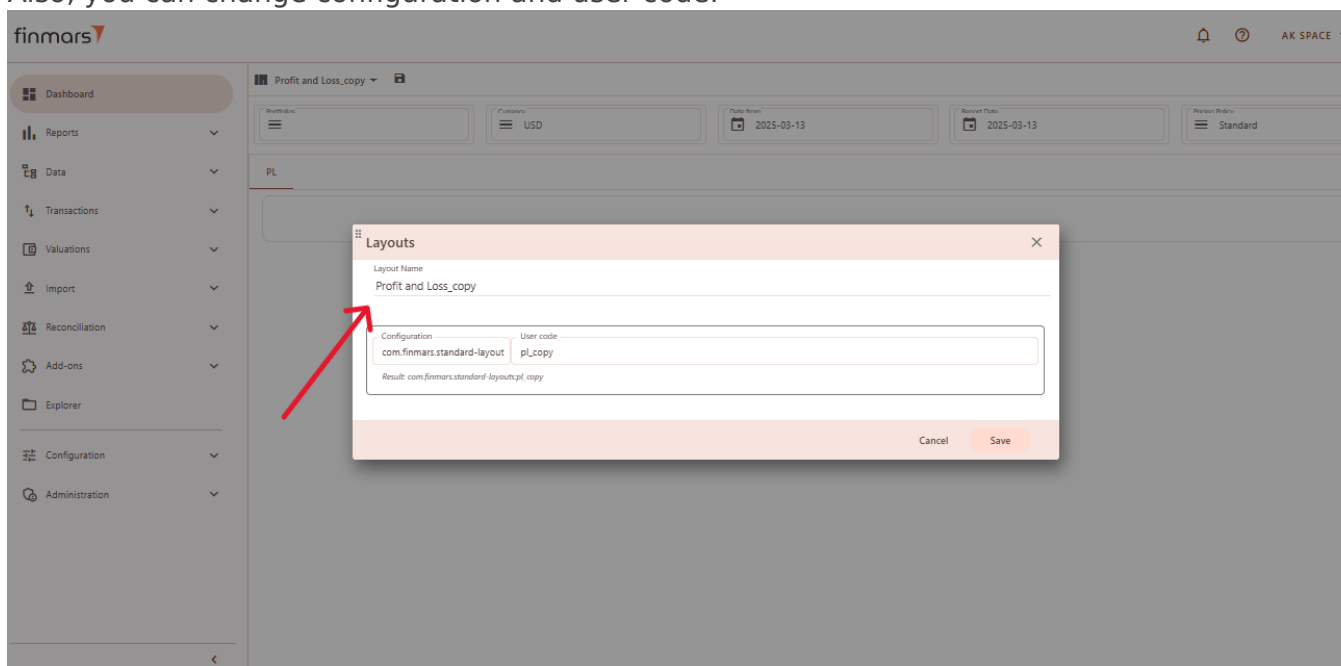
PnL Total

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

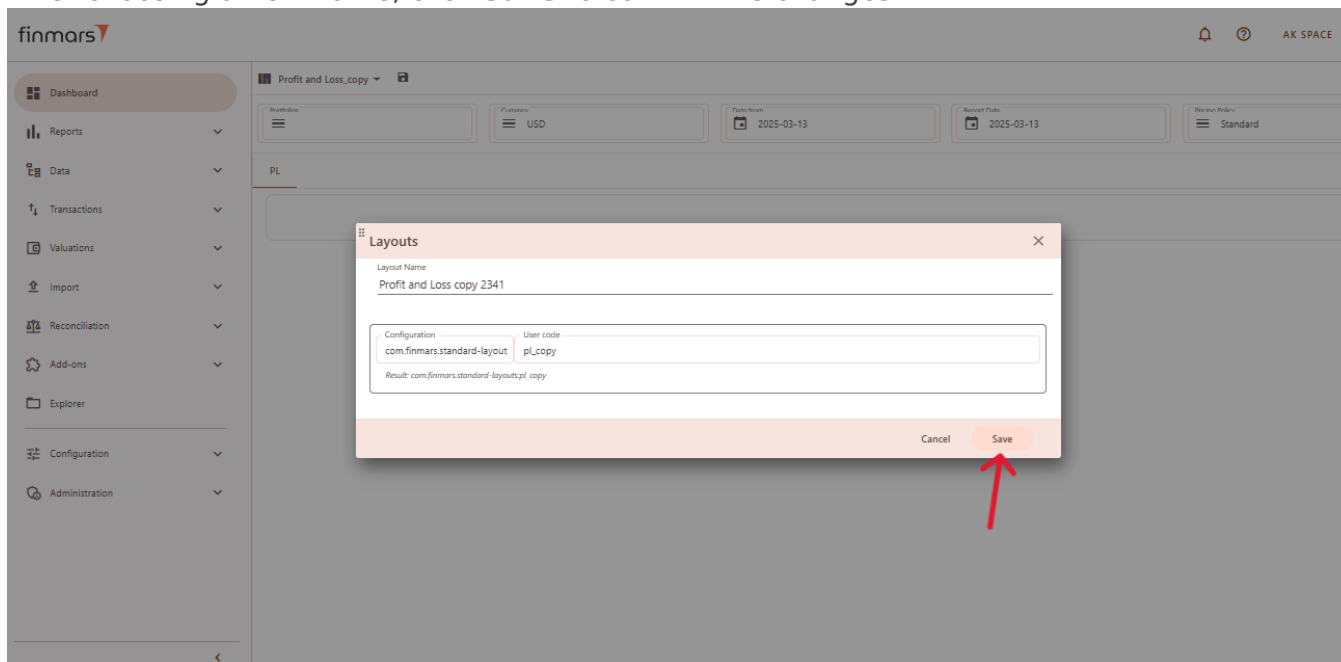
4. After copying, you can **Rename** the new layout for clarity and organization. Click on the **Rename** option.



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.



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



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