

# 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

Currency: USD

Trade From: 2023-06-21

Report Date: 2025-03-04

Previous Period: Standard

PnL Total <span>▼</span> <span>&gt;</span>	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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Dashboard

Reports

Data

Transactions

Valuations

Import

Reconciliation

Add-ons

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)		(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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Dashboard

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Import

Reconciliation

Add-ons

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Configuration

Profit and Loss\_copy

+3

USD

2023-06-21

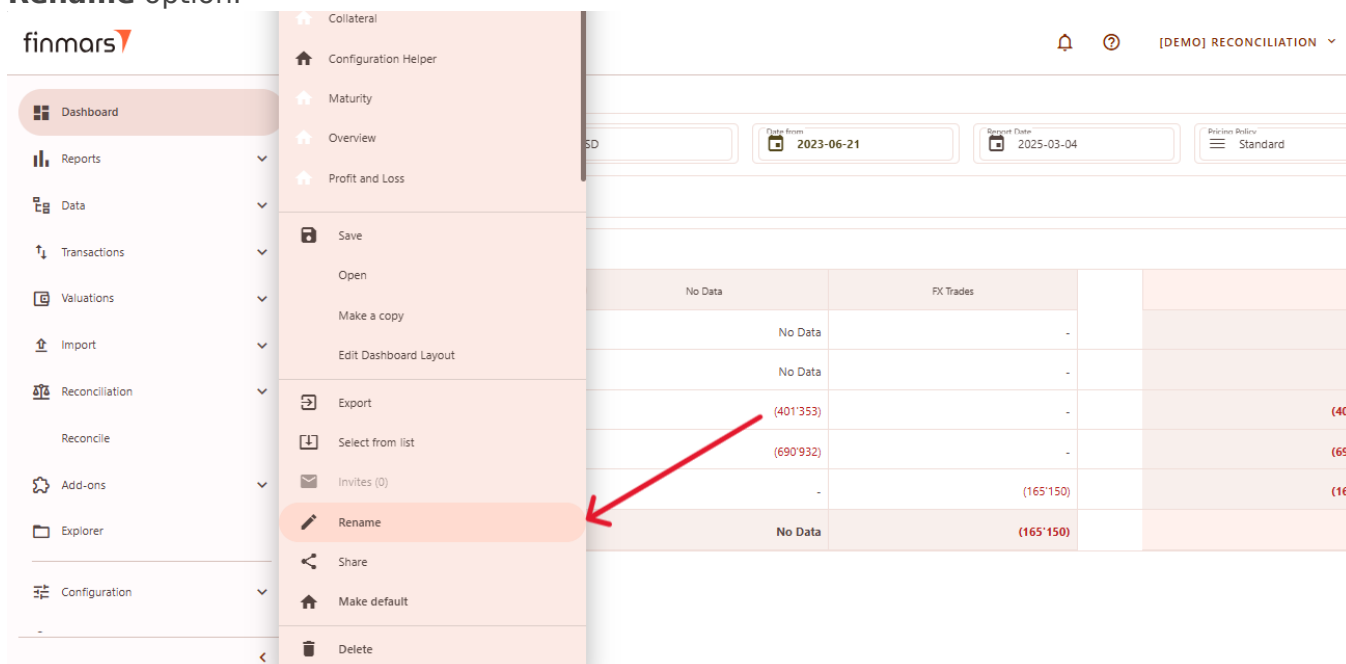
2025-03-04

Standard

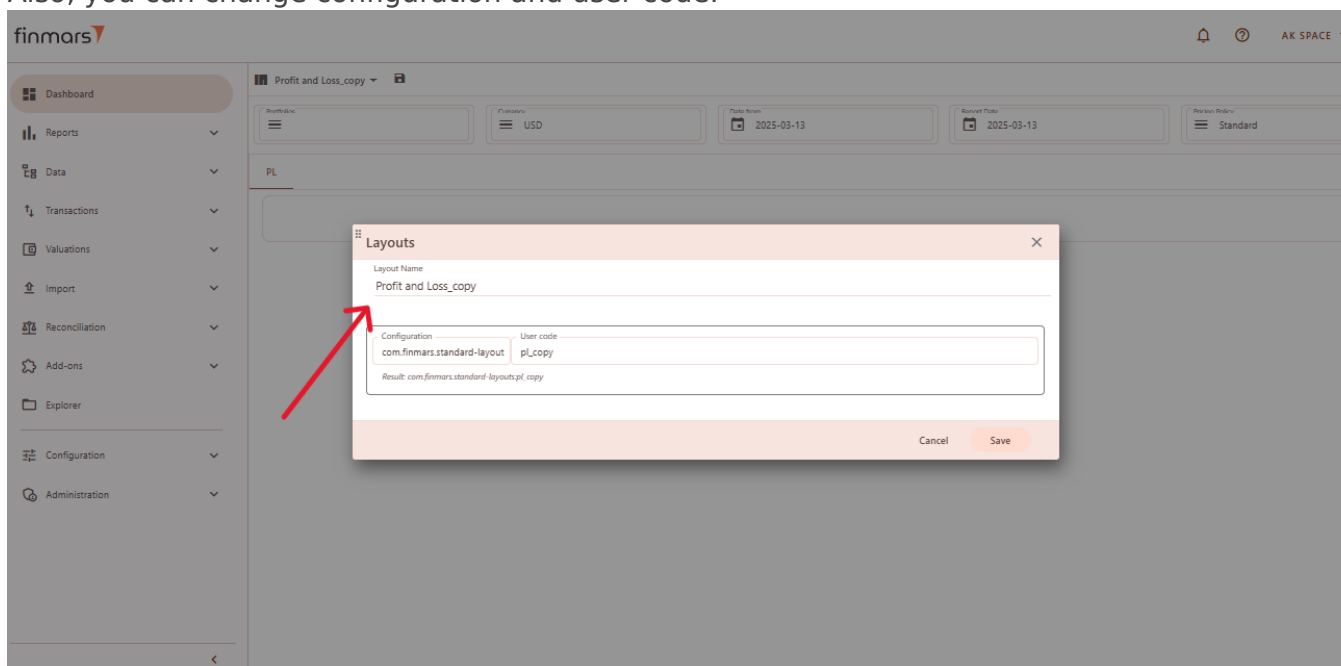
PL

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)		(165'150)

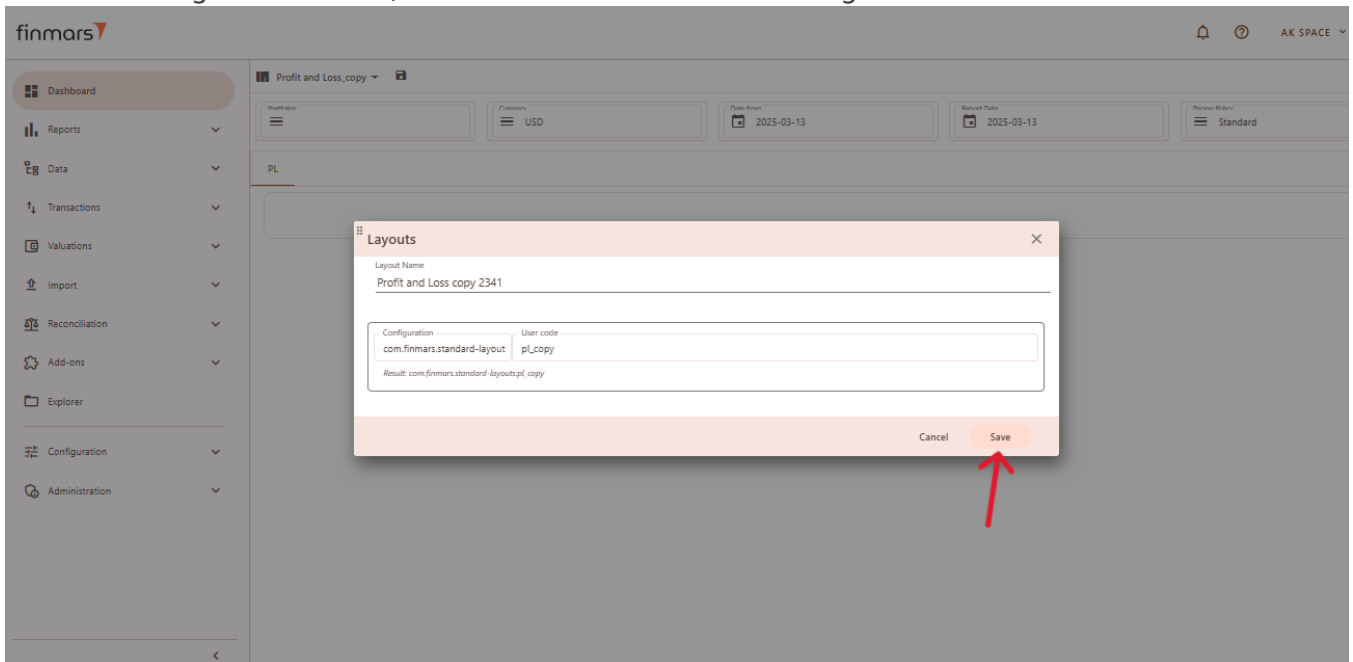
4. After copying, you can **Rename** the new layout for clarity and organization. Click on the **Rename** option.



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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