Using the Dashboard

Dashboard Elements

The Dashboard is your portal to the information shared with you by your Associate. You can view reports that display your data in real time, view announcements from your adviser, and view and post documents. The Dashboard contains four main elements, which we explain below.

1. Menu Bar

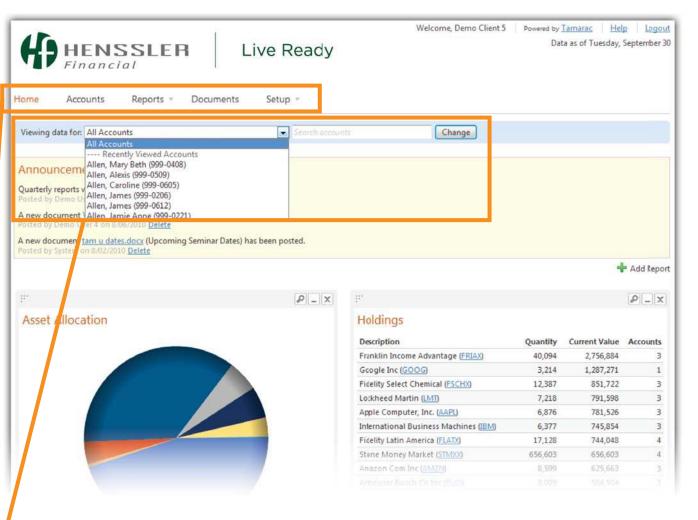
The menu bar provides access to all the content shared with you by your adviser.

- Home: Quick access to the Dashboard.
- Accounts: Displays your accounts.
- Reports: Quickly access all available reports.
- Documents: Access all the documents posted to you by your adviser, as well as the documents that you have posted to your adviser.
- Setup: Change your password.

2. View Options

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This view area is available for the Dashboard, Reports and Documents pages, and enables you to filter the displayed information. On the Dashboard and Reports areas, you can view data for all your accounts or select a specific account from the Viewing data list. On the Documents page, you can view all documents or select from the list of pre-defined filters.



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3. Announcements

The Announcements area is available on the Dashboard. This section displays any announcements or new documents posted by your Henssler team. You can delete an announcement by clicking the Delete link for each associated post. If the announcement is for a new document posted by your adviser, you can open the document directly by clicking the document link. If you delete the announcement for a new document, the document will not be deleted. It will still be available on the Documents page.

4. Dashboard Reports

The remainder of the Dashboard lists a collection of reports shared with you by Henssler. By default, tall of the available reports will be listed:

- Holdings
- Realized Gains/Losses
- Documents
- Income and Expenses
- Asset Allocation
- Unrealized Gains/Losses
- Transactions

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You can customize the layout of the reports on your Dashboard in either a one- or two-column display. The reports on your Dashboard provide an at-a-glance view of the detailed reports available on the Reports page.

HENSSLER PLANNING PORTAL

