

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

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.

Viewing data for: **All Accounts** | Search accounts | Change

Announcements:

- Quarterly reports v...
Posted by Demo U...
- A new document...
Posted by Demo User 4 on 8/16/2010 [Delete](#)
- A new document [tam_u_dates.docx](#) (Upcoming Seminar Dates) has been posted.
Posted by System on 8/02/2010 [Delete](#)

Asset Allocation

Holdings

Description	Quantity	Current Value	Accounts
Franklin Income Advantage (FRIAX)	40,094	2,756,884	3
Google Inc (GOOG)	3,214	1,287,271	1
Fidelity Select Chemical (FSCHX)	12,387	851,722	3
Lockheed Martin (LMT)	7,218	791,598	3
Apple Computer, Inc. (AAPL)	6,876	781,526	3
International Business Machines (IBM)	6,377	745,854	3
Fidelity Latin America (FLATX)	17,128	744,048	4
Stone Money Market (STMXX)	656,603	656,603	4
Amazon Com Inc (AMZN)	8,599	625,663	3
Arheuser Busch Co Inc (BUSC)	9,009	584,504	3

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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, all of the available reports will be listed:

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

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.

The screenshot displays the Henssler Financial Live Ready dashboard. At the top, it says "Welcome, Demo Client 5" and "Powered by Tamarac". The main navigation includes Home, Accounts, Reports, Documents, and Setup. Below the navigation is a search bar for accounts. The "Announcements" section is highlighted with an orange border and contains three posts: a new document "Welcome Tips.docx", a performance report ready by 8/15, and another document "tam_u_dates.docx". Below the announcements is an "Add Report" button. The "Asset Allocation" report is shown as a pie chart, and the "Holdings" report is a table with columns for Description, Quantity, Current Value, and Accounts.

Description	Quantity	Current Value	Accounts
Franklin Income Advantage (FRIAX)	40,094	2,756,884	3
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