

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.

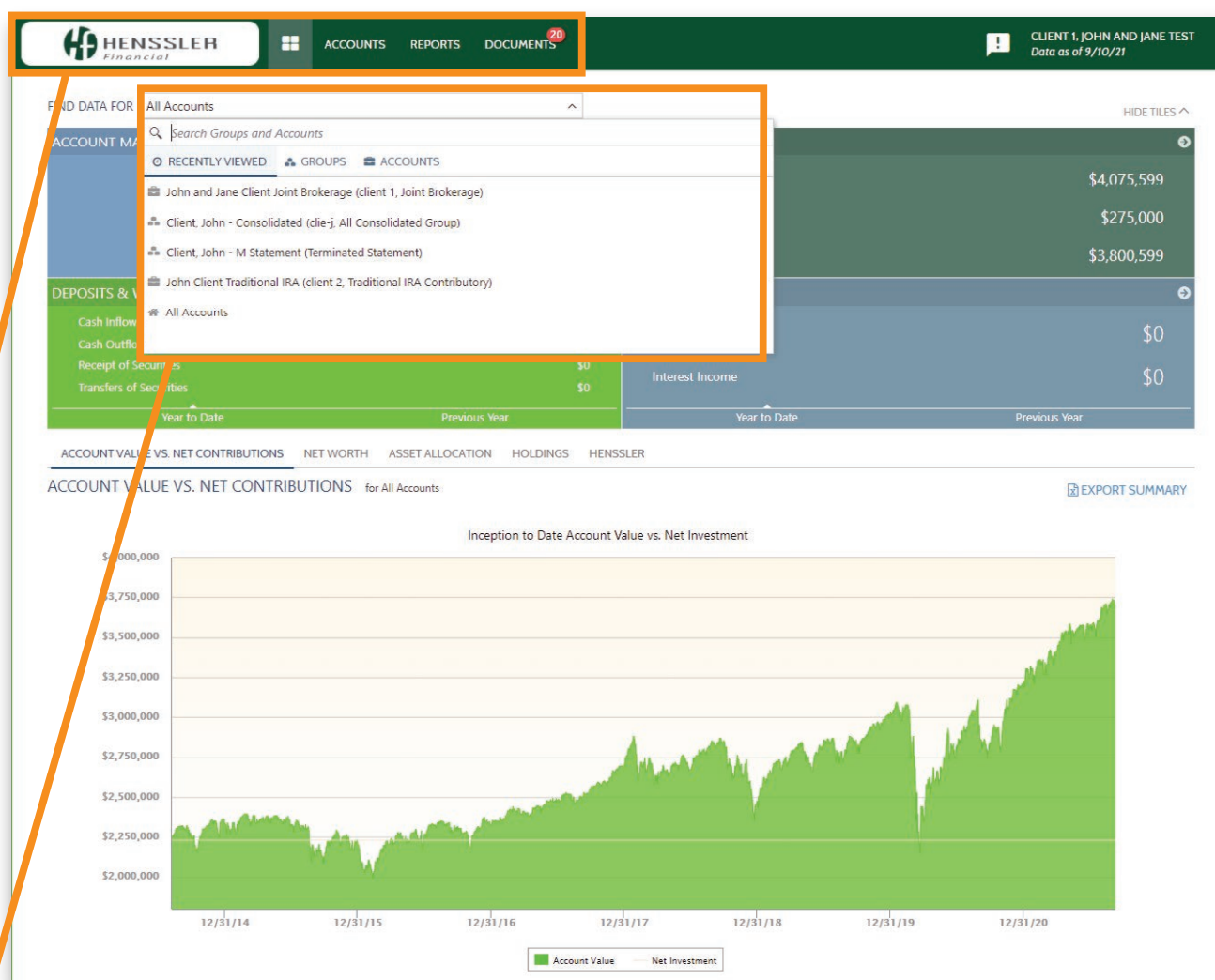
1. Menu Bar

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 you have posted to your adviser.

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.



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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 download link. If you delete the announcement for a new document, it will not delete the document. 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.

- Holdings
- Realized Gains/Losses
- Documents
- Income and Expenses
- Asset Allocation
- Unrealized Gains/Losses
- Transactions
- Net Worth
- Account Market Value

The reports on your Dashboard provide an at-a-glance view of the detailed reports available on the Reports page.

