

| ClientWorks Dashboard Customization How to Guide

OVERVIEW

You can now customize the layout of your widgets on the Client Management Homepage and the Practice Metrics tab. This guide shows you how to turn the customization capabilities on, how to add, remove, relocate, and resize widgets on the page, and how to save the updated layouts as your new default view.

ICONS



Alert or Important



Information or Note

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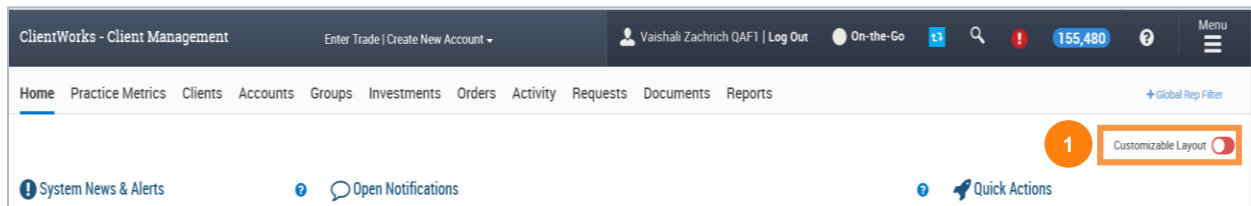


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HOME TAB

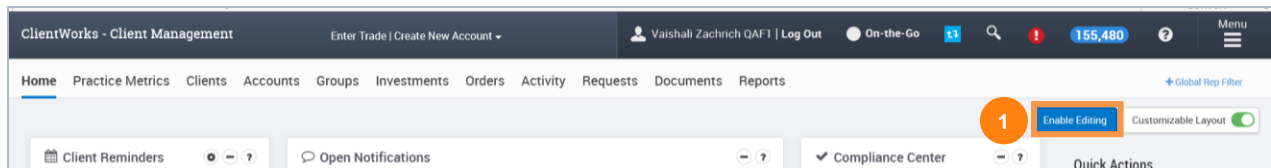
TURNING ON CUSTOMIZATION

1. To change the traditional dashboard to the customizable dashboard, click the **Customizable Layout** toggle button. This button allows you to turn on/off the customization capabilities.

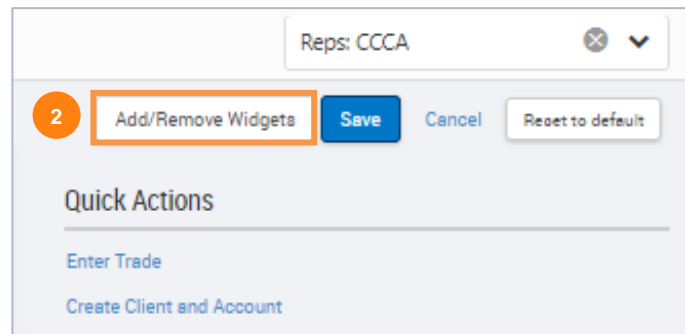


ADDING/REMOVING WIDGETS

1. From the displayed dashboard, click the **Enable Editing** button to begin customizing the layout.



2. Click the **Add/Remove Widgets** button to add or remove widgets based on your business need.



3. New widgets will be indicated with a red **"NEW"** banner.
 - a. Select or deselect the checkbox beside the widget headers to add or remove widgets.
 - b. Click **Apply** to confirm your selections. The newly selected widgets will be displayed at the bottom of the page. If you only wish to add or remove widgets, click **Save** to confirm the changes.



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Add/Remove Widgets

Select widgets you would like to Add or Remove from your home screen. Once you have made all selections click apply. Selected widgets will display at the end of your Home screen, scroll down to see newly added widgets.

Select All

☒ Asset Distribution

Graph
Asset Distribution is a visual graph that displays your current AUM and what percentages it is broken up into.

☒ Assets by Objective and Platform

Graph
This graph provides visual representation of your AUM broken up by either investment Objectives or Assets by Platform.

☒ Client Reminders

List
Client Reminders provides quick access to important customer reminders, such as upcoming birthdays and anniversaries.

☒ Compliance Center

List / Summary
Compliance Center provides quick access to items in each of these categories: Proactive Surveillance, Outside Business Activity, OSJ Review Tool, and Brokerage Compliance.

☒ Latest LPL Research

List / Feed
Latest LPL Research provides recent articles from LPL Research Teams on the market and news, along with an inside video on the current hot topic.

☒ Market Pricing

List / Graph
Market Pricing displays a list of major and top holdings, along with specific securities that you can select to follow. These then display last price, current price, and change in price, along with a chart to show changes over time.

☒ Negative Balance

List
Provides a list of all accounts that currently hold a negative balance. Includes Rep ID, Account #, Client Name, Account Name, and Account Value.

☒ News Updates

List / Feed
News Updates displays a feed of news articles that are driving market changes and interesting financial articles to pull from.

☒ Open Notifications

List / Summary
Open Notifications provides quick access for you to see important notices regarding a variety of things, including IRA Fee Reports, Outgoing Account Transfers, Scheduled Reports, and more.

☒ Pricing Information

List
The Pricing Information widget provides a list of position alerts for your reference.

☒ Recent Activity

List
A list of recent account activities from current day as well as the previous day.

☒ Recent Requests

List / Summary
Recent Requests provides a summary number of open, pending, and not submitted requests, along with a list of the requests below.

☒ Wealth Vision

Links
Quick links to Wealth Vision Alerts, Tasks, and Dashboard.

Cancel Apply

RELOCATING WIDGETS

1. The dashboard displays individual widgets that can be moved and relocated on the page.

- Click a widget, for e.g. the **Client Reminders** widget, drag and place it where the **Open Notifications** widget is placed.
- The blue dotted lines appear when the widget is being moved. As you move the widget, you will notice the blue box moving as well, and the widget will snap to this box when placed.
- Note that the **Open Notifications** widget automatically moves downward as you try to place the **Client Reminders** in its place.

The screenshot shows the dashboard with several widgets. A blue dotted box labeled '1a' is around the 'Client Reminders' widget, which is being dragged. Another blue dotted box labeled '1b' is around the 'Open Notifications' widget, which is being moved down. A third blue dotted box labeled '1c' is around the 'Recent Requests' widget. The 'Client Reminders' widget shows a table of client birthdays and anniversaries. The 'Open Notifications' widget shows a table of notifications with columns for Notifications, Past Due, New, In Process, Submitted, and Pending. The 'Recent Requests' widget shows a table of requests with columns for Open, Pending, and Not Submitted.

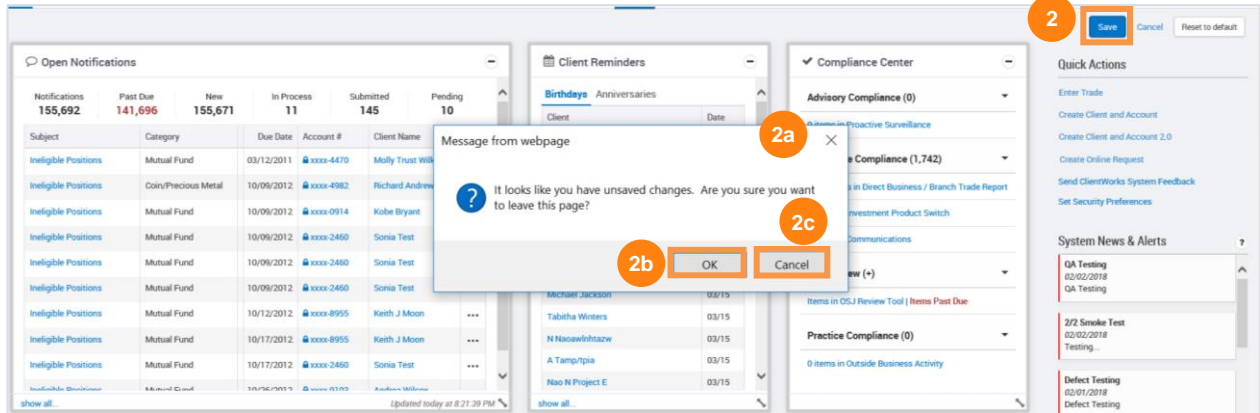
2. Ensure you click **Save**, if you don't want to lose the updates.

- If you try to leave the page without saving the updates to the dashboard, a reminder pops up asking you to save the changes.
- You can click **OK** to exit the dashboard without saving the updates.



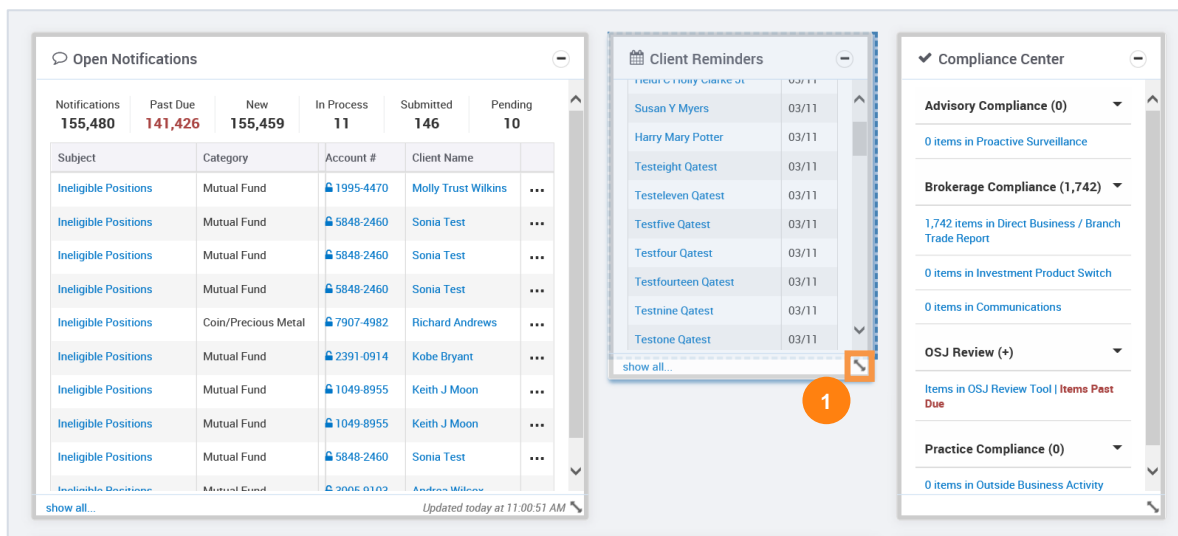
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- c. Or, click **Cancel** to go back to the dashboard. Save the updates and then proceed with the customization.



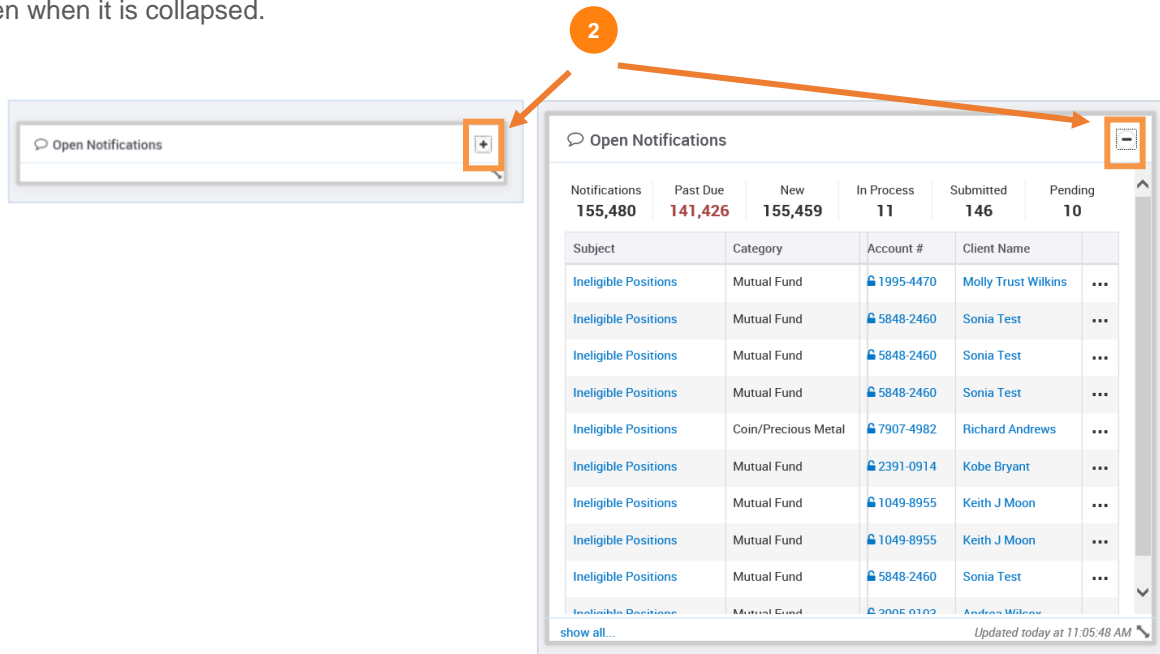
RESIZING WIDGETS

1. You can click the double-headed arrow and drag it up, down, left, or right to resize a widget.



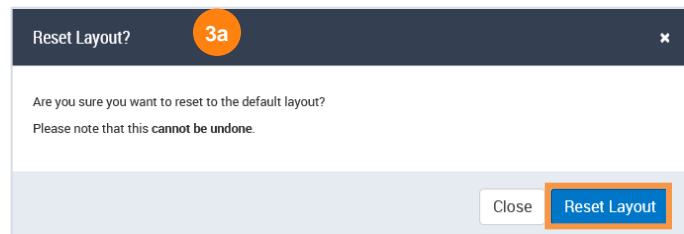
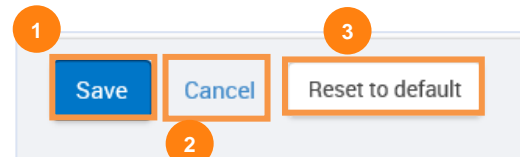
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2. Click the + or – on the widget to expand or collapse a widget. You can relocate a widget on the page even when it is collapsed.



SAVING THE UPDATES

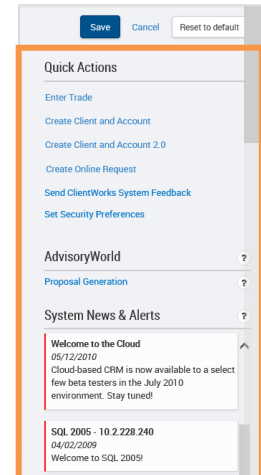
1. Remember, click **Save** to keep the changes.
2. Click **Cancel** if you don't want to save the changes.
3. Click **Reset to default** to revert to the original dashboard layout.
 - a. A pop-up message appears asking to confirm if you want to reset to the default layout.



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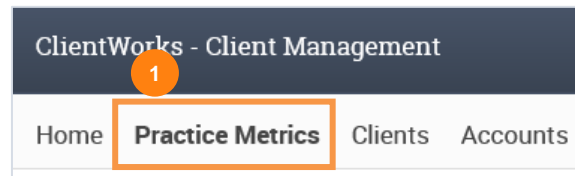


The **Quick Actions** links and the **System News & Alerts** section are not editable when customization is turned on. They remain stationary on the right side of the dashboard. When customization is turned off, they're located with the other widgets on the dashboard.



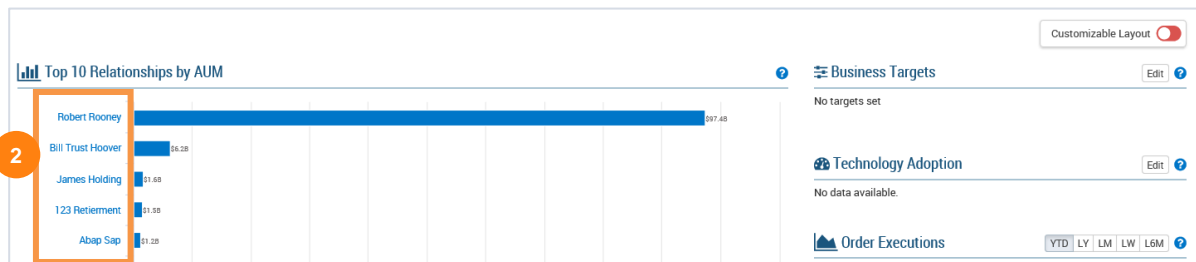
PRACTICE METRICS TAB

1. Similarly, you can also customize the layout of the **Practice Metrics** tab.

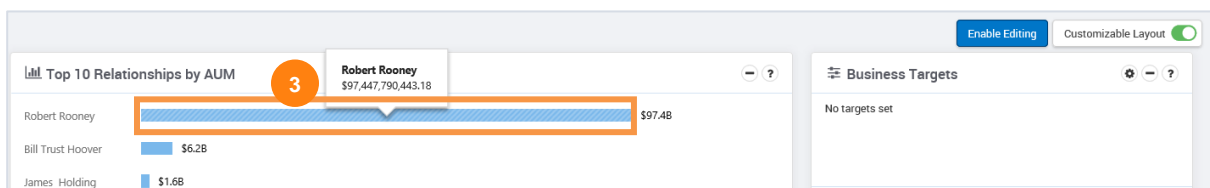


KEY POINTS TO NOTE

2. When the customization feature is turned off, the client names in the **Top 10 Relationships by AUM** section is displayed with hyperlinks.



3. When you turn the customization feature on, note that the bar graph is hyperlinked instead of the client name.



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There is a limitation under the customizable view where text cannot contain a hyperlink. However, if you select the actual bar graph instead of the client name within the widget, you can navigate to the Client Summary page just as when you selected the client name on the default layout.

ClientWorks - Client Management

Enter Trade | Create New Account

[Back to Clients List](#)

Robert Rooney

Client Name

Robert Rooney

SSN/TIN

xxx-xx-7220

Rep

2TGC

Total Accounts Value

\$97,447,790,443.18

Funds Available

\$97,444,930,346.35

Summary

Goals

Investments

Orders

Activity

Requests

Documents

Statements

Client Profile Summary

(262) 789-9056

TEST1@LPL.COM

(262) 789-9012

Edit

123 New Street, New Street, CA 92

Personal Info

Group Info

Birthday

Feb 4, xxxx - Age 74

SSN/Tax ID

xxx-xx-7220

Client Since

Oct 16, 2007

Client Group Name

East Ralph

Group Keyword

-

Group Reporting Title

EAST RALPH

Rep ID

2TGC

