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

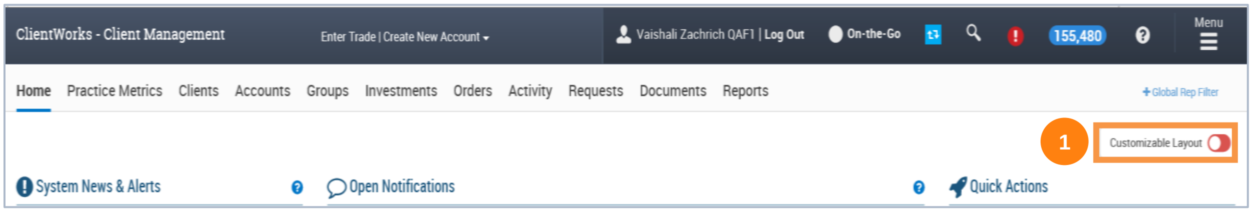
Information or Note

CONTENTS

HOME TAB

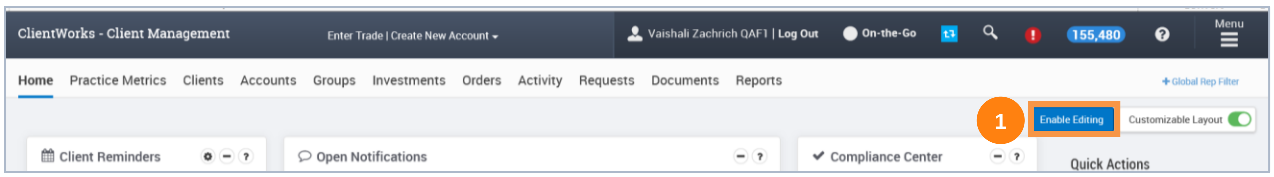
TURNING ON CUSTOMIZATION

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.

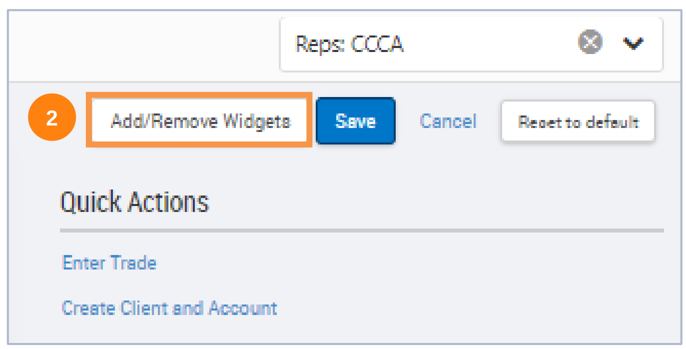


ADDING/REMOVING WIDGETS

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



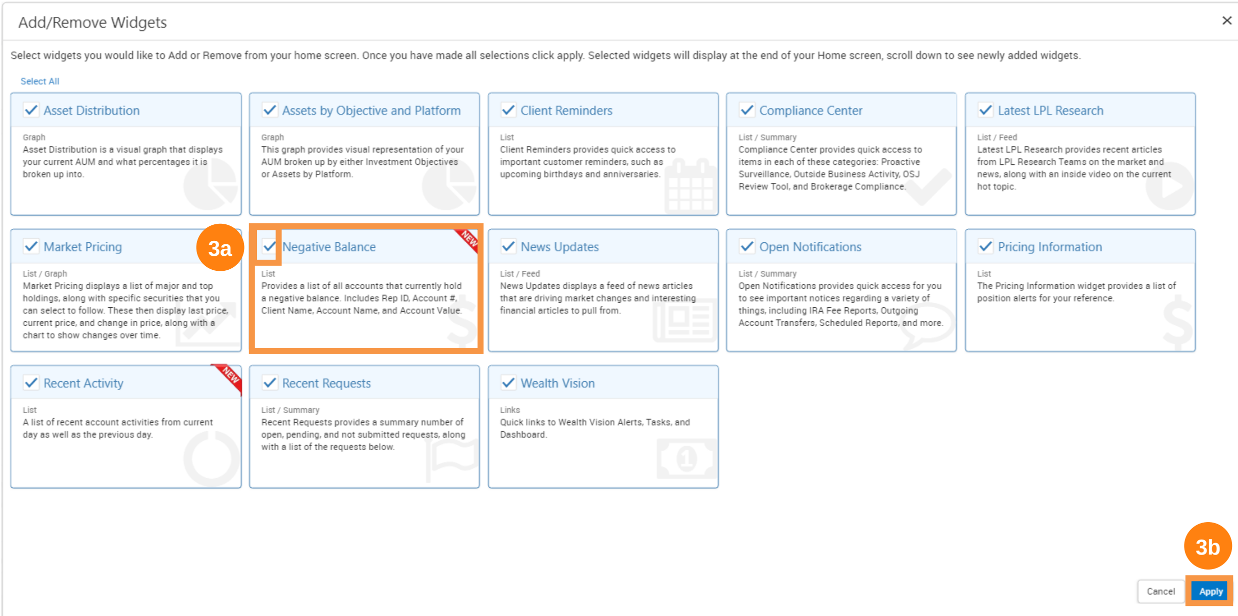
2. Click the **Add/Remove Widgets** button to add or remove widgets based on your business need.



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.



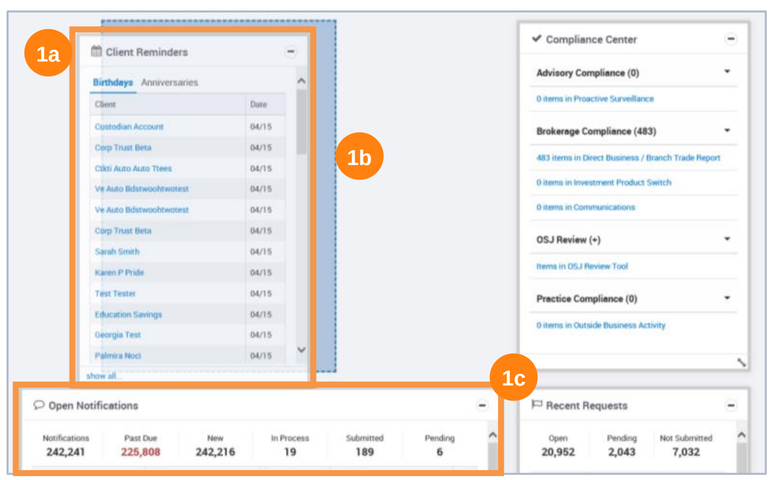
RELOCATING WIDGETS

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

   a. Click a widget, for e.g. the **Client Reminders** widget, drag and place it where the **Open Notifications** widget is placed.

   b. 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.

   c. Note that the **Open Notifications** widget automatically moves downward as you try to place the **Client Reminders** in its place.

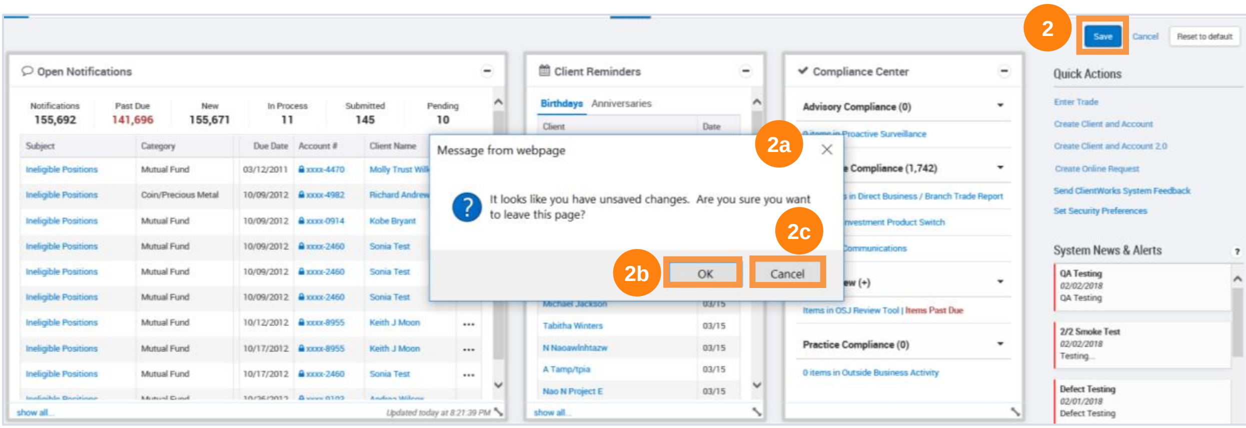


2. Ensure you click **Save**, if you don't want to lose the updates.

   a. If you try to leave the page without saving the updates to the dashboard, a reminder pops up asking you to save the changes.

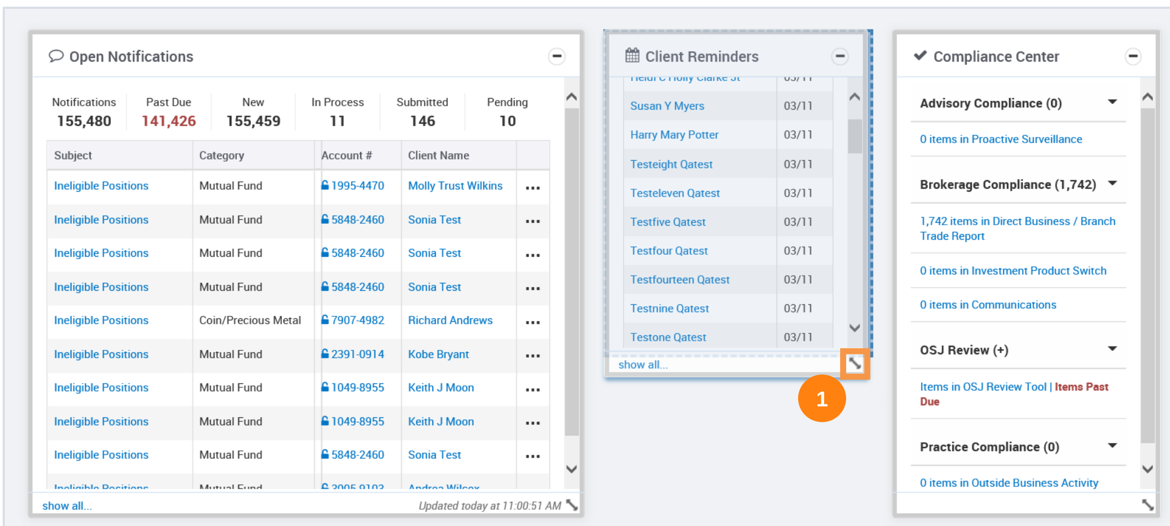
   b. You can click **OK** to exit the dashboard without saving the updates.

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

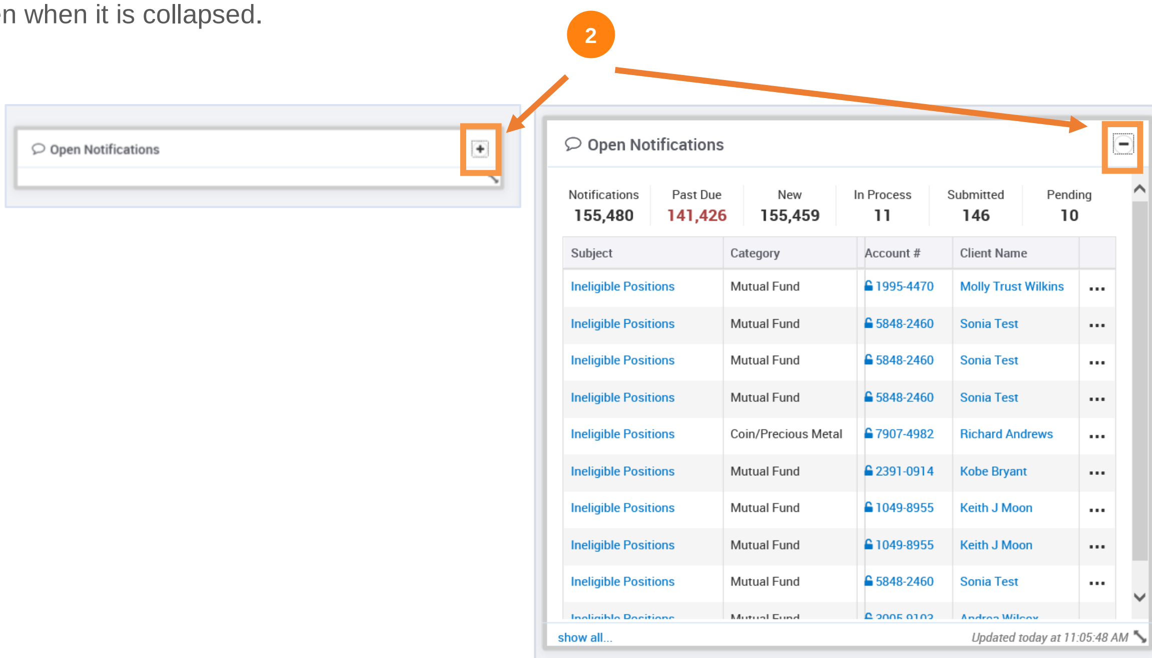


RESIZING WIDGETS

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

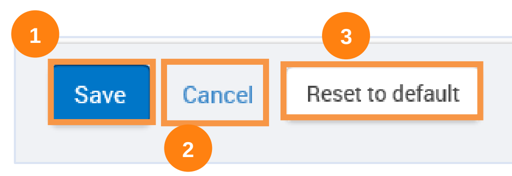


2. Click the **+** or **–** on the widget to expand or collapse a widget. You can relocate a widget on the page even when it is collapsed.

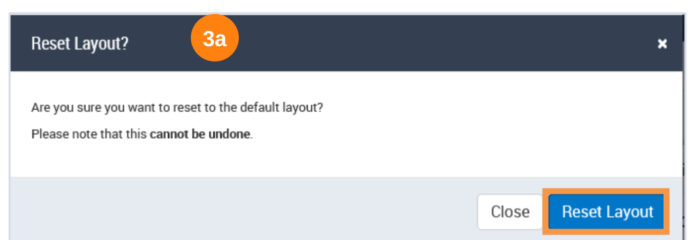


SAVING THE UPDATES

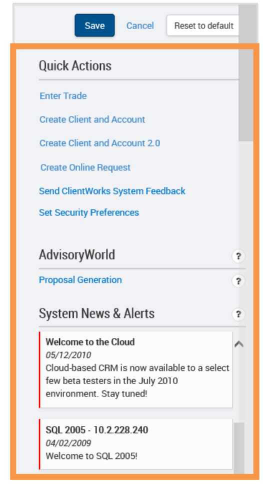
1. Remember, click **Save** to keep the changes.
2. Click **Cancel** if you don't want to save the changes.
3. Click **Reset to default** to revert to the original dashboard layout.



   a. A pop-up message appears asking to confirm if you want to reset to the default layout.

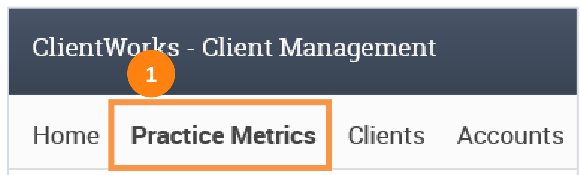


The **Quick Actions** links and the **System News & Alerts** section are not editable when customization is turned on. They remain stationary on the right side of the dashboard. When customization is turned off, they're located with the other widgets on the dashboard.



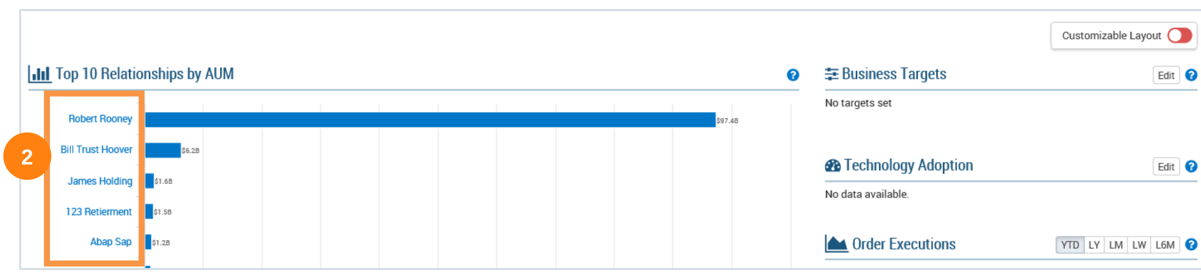
PRACTICE METRICS TAB

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

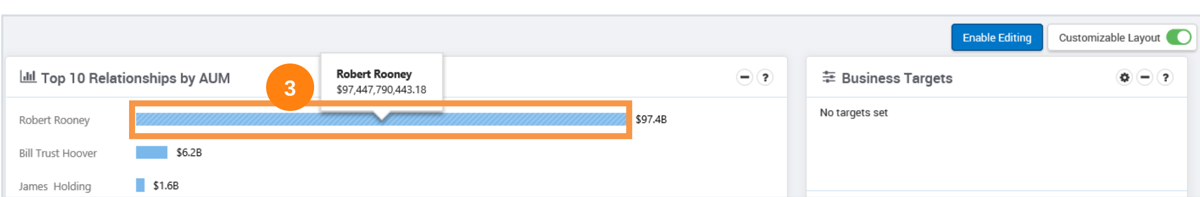


KEY POINTS TO NOTE

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.



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.