

How to... Configure the dashboard

CloseNet's customisable dashboard allows you to quickly and easily configure the content and layout of your homepage using what are called 'widgets'

Widgets enable you to choose your personalised onscreen display, showing only the features and functionality that your business requires at any given time.

This option is available at Agreement level only. They cannot be used on an Aggregation/Group level.

1. From your [Agreement Summary](#) page:
Select [Click here to add widget](#) on the right hand side of the window.

The screenshot shows the Close Brothers dashboard interface. On the left is a navigation sidebar with icons for Home, Agreements, Debtors, Ledger, and Data Exchange. The main header displays the company logo and 'Close Brothers'. Below the header, there's a 'Selected Client' dropdown set to 'A Client Ltd' and 'Agreement Type: Non Recourse Factoring'. A horizontal menu includes 'Agreement Summary', 'Movements', 'In-Payment Enquiry', 'Out-Payment Enquiry', 'Ageing', 'Statistics', and 'Snapshot'. The 'Agreement Summary' section contains fields for 'Request Funds', 'Available Funds' (-4,455.92 GBP), 'Payment Type' (CHAPS GBP), 'Payment Recipient' (ain Account), and 'Amount Requested' (0.00 GBP). A dashed box on the right side of the main content area contains the text 'Click here to add widget'.

2. The widget selection pop-up menu is displayed, as highlighted. Select the widget you wish to add by clicking on it.
For example, we have selected the [Breakdown](#) menu, which displays how your availability has been calculated.

This screenshot is similar to the first one but shows a widget selection pop-up menu on the right side of the dashboard. The menu lists several options: 'Ageing Graph', 'Breakdown' (highlighted in yellow), 'Limits', 'Main Balances', 'Movements & DSO', 'Movements This Month', 'Out-Payments Today', and 'Pending Reminders'. The 'Breakdown' option is circled in blue. The background dashboard content is partially visible and dimmed.

You can add as many widgets as you like, simply scroll the columns to access the one you need to use at a particular item.

3. The new **Breakdown** widget will then be displayed. It provides links to items like Availability Breakdown and Disapproved Breakdown, Disputes etc.

The screenshot shows the Close Brothers dashboard for 'A Client Ltd'. The 'Request Funds' form is visible with the following details:

- Selected Client: A Client Ltd
- Agreement Type: Non Recourse Factoring
- Available Funds: -4,455.92 GBP
- Payment Type: CHAPS GBP
- Payment Recipient: ain Account
- Amount Requested: 0.00 GBP

The 'Breakdown' pop-up window is open, showing the following data:

Availability Breakdown		Disapproved Breakdown		
Borrowing Base	-	Deductions	=	Availability
99,602.56 GBP	-	104,058.48 GBP	=	-4,455.92 GBP
Borrowing Base				99,602.56 GBP
Sales Ledger				128,431.56 GBP
Funding Disapproved				0.00 GBP
Funding Approved Balance				128,431.56 GBP
Prepayment Percentage				@ 85%
Deductions				104,058.48 GBP
Funds in Use				104,058.48 GBP
Pending Out-Payments				0.00 GBP
Concentration Retention				11,252.08 GBP
Additional Information				
Client Balance Amount				28,829.00 GBP

5. Once you have the dashboard as you require, save the changes by clicking on the **drawing pin icon**, located on the top right hand side of the screen.

A pop up will advise you that your default view has been changed and saved.

The screenshot shows the CloseNet user interface. The user profile 'user1234' is visible, along with a 'Logout' button and a yellow drawing pin icon circled in blue, indicating where to click to save the dashboard configuration.

6. Removing a widget is just as straightforward. Simply click on the X button on the upper right and it will be temporarily removed from the current display.

The screenshot displays the Close Brothers dashboard interface. On the left is a vertical navigation menu with icons for Agreements, Debtors, Ledger, Data Exchange, Reporting, and Administration. The main content area is titled 'Selected Client: A Client Ltd' and 'Agreement Type: Non Recourse Factoring'. It features several tabs: Agreement Summary (selected), Movements, In-Payment Enquiry, Out-Payment Enquiry, Ageing, Statistics, and Snapshot. The 'Request Funds' widget is the central focus, showing 'Available Funds' at 9,068.62 EUR and 'Aggregated Available Funds' at 20,870.47 EUR. It includes a 'Payment Type' dropdown set to 'Take-on CHAPS EUR' and a 'Payment Recipient' dropdown set to 'Main'. Below this is an 'Amount Requested' field with '9,068.62' entered. A text box provides instructions: 'Priority payment requests received by 10:00 are sent before 11:00 and come with an additional charge. Same day payments CHAPS can be requested up to 14:00 and BACS payments can be requested up to 14:30. All payments are subject to approval.' There are 'Add Payment Details' and 'Request Funds' buttons. To the right of the 'Request Funds' widget is a 'Breakdown' widget with a close button (X) in its top right corner. The 'Breakdown' widget shows 'Availability Breakdown' and 'Disapproved Breakdown' tables. The 'Availability Breakdown' table has columns for 'Borrowing Base', 'Deductions', and 'Availability'. The 'Disapproved Breakdown' table is currently empty. Below these are sections for 'Borrowing Base' (39,068.62 EUR), 'Sales Ledger' (59,210.28 EUR), 'Funding Disapproved' (1,691.00 EUR), 'Funding Approved Balance' (58,948.88 EUR), 'Prepayment Percentage' (@ 85%), 'Deductions' (30,000.00 EUR), 'Funds in Use' (0.00 EUR), 'Pending Out-Payments' (30,000.00 EUR), 'Concentration Retention' (11,556.20 EUR), and 'Additional Information' (Client Balance Amount: 18,450.66 EUR). At the bottom of the dashboard, it says 'Date Updated 26/08/20 16:08'.