

# Personalizing Report Headers

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This guide explains adding custom report headers for business documents. It is intended for advanced users.

aACE allows you to use a single report header or personalize the report headers by office.

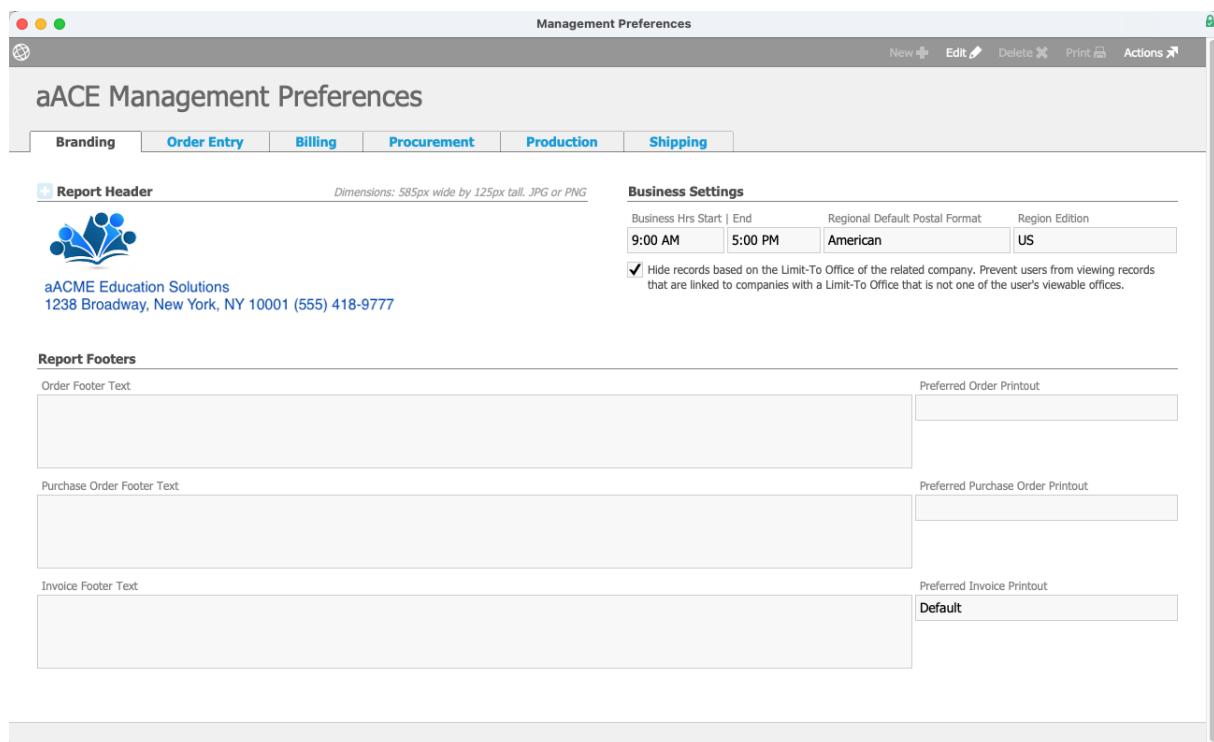
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## Update a Report Header for All Offices

Report headers for all offices display on documents such as invoices, purchase orders, and receipts regardless of which office a user is logged in to.

1. From the Main Menu, go to **Internal > Management Preferences > Branding**.



The screenshot shows the 'Management Preferences' page with the 'Branding' tab selected. The 'Report Header' section contains a logo and company information: 'aACME Education Solutions' and '1238 Broadway, New York, NY 10001 (555) 418-9777'. The 'Business Settings' section includes fields for 'Business Hrs Start' (9:00 AM), 'End' (5:00 PM), 'Regional Default Postal Format' (American), and 'Region Edition' (US). A checkbox for hiding records based on the limit-to office is checked. The 'Report Footers' section contains three text input fields: 'Order Footer Text', 'Purchase Order Footer Text', and 'Invoice Footer Text', each with a corresponding 'Preferred Order Printout', 'Preferred Purchase Order Printout', and 'Preferred Invoice Printout' dropdown menu.

2. Select **Edit**.
3. Select the **Add icon** (  ) to upload a new header.
4. Locate the new header image file and select **Open**.

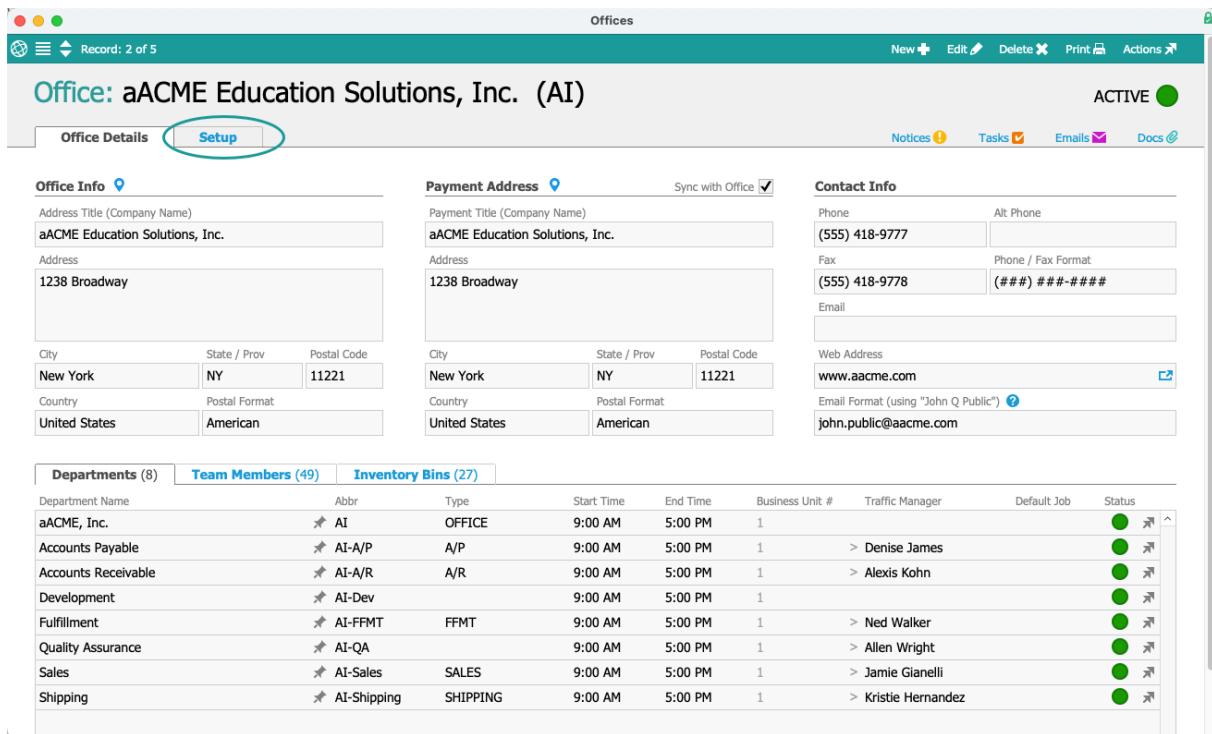
Use images measuring 585 x 125 pixels in .jpg, or .png format. Select **Save**.

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## Update a Report Header for an Office

Once you upload an office-specific report header, documents such as invoices, purchase orders, and receipts for that office will include the branding.

1. From the Main Menu, go to **Internal > Offices**.
2. Use the Quick Search bar to locate the office record.
3. At the detail view, select **Setup**.



Department Name	Abbr	Type	Start Time	End Time	Business Unit #	Traffic Manager	Default Job	Status
aACME, Inc.	AI	OFFICE	9:00 AM	5:00 PM	1	> Denise James		
Accounts Payable	AI-A/P	A/P	9:00 AM	5:00 PM	1	> Alexis Kohn		
Accounts Receivable	AI-A/R	A/R	9:00 AM	5:00 PM	1	> Ned Walker		
Development	AI-Dev		9:00 AM	5:00 PM	1	> Allen Wright		
Fulfillment	AI-FFMT	FFMT	9:00 AM	5:00 PM	1	> Jamie Gianelli		
Quality Assurance	AI-QA		9:00 AM	5:00 PM	1	> Kristie Hernandez		
Sales	AI-Sales	SALES	9:00 AM	5:00 PM	1			
Shipping	AI-Shipping	SHIPPING	9:00 AM	5:00 PM	1			

4. Select **Edit**.
5. Disable the preference **Use default Report Header**.

The screenshot shows the 'Offices' module in a web browser. The title bar says 'Offices' and 'Record: 2 of 5'. The main content area is titled 'Office: aACME Education Solutions, Inc. (AI)'. There are two tabs: 'Office Details' (selected) and 'Setup'. The 'Setup' tab has tabs for 'Office Details', 'Setup' (selected), 'Tax Details', and 'Additional Info'. The 'Office Details' tab shows the company name 'aACME Education Solutions, Inc.' and a search icon. The 'Tax Details' tab shows Tax ID '555555', Entity # '1', and Tax Automation Code. The 'Additional Info' tab is empty. The 'Setup' tab has a 'Report Header' section with a preview of a logo and company address, and a note about dimensions and file format. A checkbox 'Use default Report Header' is circled with a green oval.

6. Select the **Add icon** (  ) to upload a new header.
7. Locate the new header image file and select **Open**.  
Use images measuring 585 x 125 pixels in .jpg, or .png format.
8. Select **Save**.