

Select a Portal / Report Header

Matrix allows you to select a header for your *Client Portal* and printable reports.

Click the *expand collapse arrow* next to your name 1

Select "**Settings**" 2

Click "**My Information**" 3

Click "**Header & Footer**" 4

 Hello, Allyson  1

- Admin
- Settings 2
- Help
- Mobile

Settings



My Information 3

Manage personal branding and options



Hot Sheets

Number of Hot Sheets: 20



Portal Notification Settings

Number of Notifications: 11

Information | **Header & Footer** 4 | CMA Cover Sheet | Email Signature | Portal Profile

The following templates are the headers from available packages. To disable a header/footer, select the "I choose not to use a header/footer at this time" option below then click the Save button.

I choose not to use a header/footer at this time

Basic Template

 **Allyson Fryar**
REcolorado Employee
afryar@recolorado.com
Ph:
Time to have a home not just a place to live!

Beach Chairs

 **Allyson Fryar**
REcolorado Employee
afryar@recolorado.com
Ph:
Time to have a home not just a place to live!



Select a Portal / Report Header

Select a *header* by clicking the *radio button* **5** next to the *header* of interest

Information
Header & Footer
CMA Cover Sheet
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I choose not to use a header/footer at this time

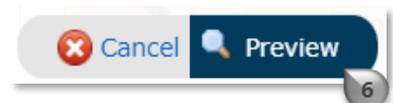
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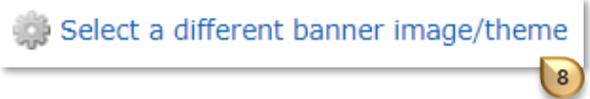
Scroll to the bottom of the page and click **"Preview"** **6**



Click **"Save"** **7** to keep the selected banner



Click **"Select a different banner image/theme"** **8** to start the selection process over



To select *Contact Information* to display on the banner click on the **Branding** drop downs and select the options of interest 

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Use this page to customize your personal Header which is displayed on your contacts' Portals and also available when you print displays and reports. You can select from a library of standard banner images for your Header, each with a complimentary color scheme for your branding, or upload your own. You can also customize your Print Footer.

? Portal Header:



Stacy Anderson-Oakes

Mobile: 303-555-1234

Ph: 303-850-9576

www.recolorado.com

Your listing Your lead

Banner Image: Your current banner image is displayed above. [Select a different banner image/theme](#)
[Upload a custom banner image](#)

Photo: No Photo Use Custom Photo [Change photo](#)

Branding:

Stacy Anderson-Oakes ▼

Mobile: 303-555-1234 ▼

Ph: 303-850-9576 ▼ 

www.recolorado.com ▼

Your listing Your lead ▼

Colors: Use theme defaults Use custom colors

Click **"Save"** 

 Reset Branding to Defaults  Save

