

# Select a Portal / Report Header

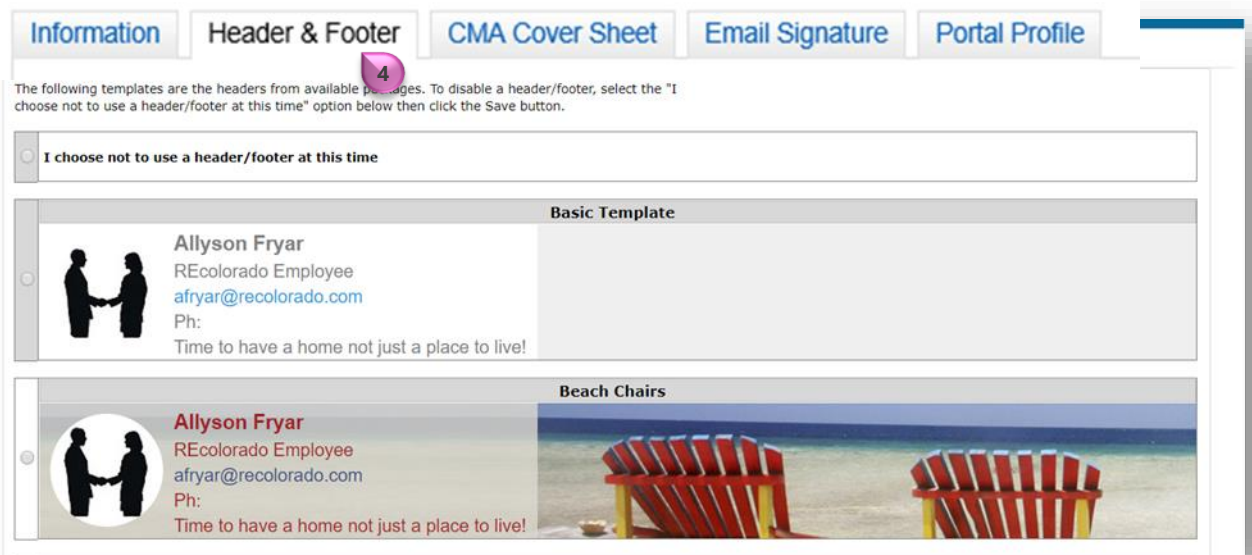
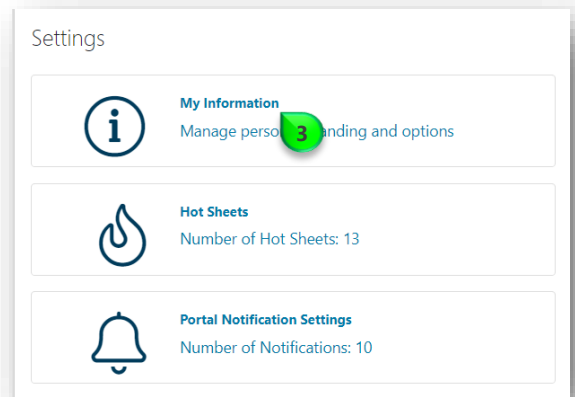
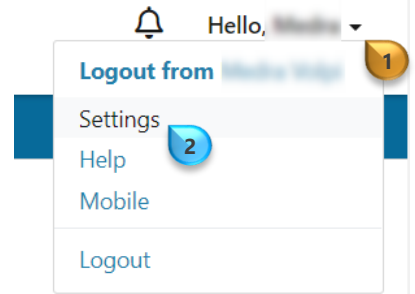
Matrix allows you to select a header for your Client Portal and printable reports.

Click the *drop down arrow* next to your name 

Select **"Settings"** 

Click **"My Information"** 

Click **"Header & Footer"** 



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

Information Header & Footer 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

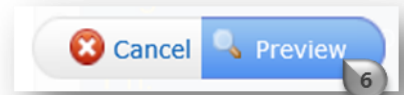
**Basic Template**

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

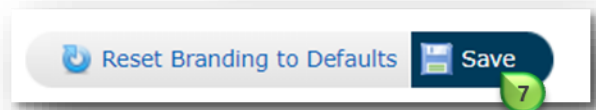
**Beach Chairs**

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

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 **9**

Information
Header & Footer
CMA Cover Sheet
Email Signature
Portal Profile

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](http://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 ▼ **9**  
www.recolorado.com ▼  
Your listing Your lead ▼

Colors: 
 Use theme defaults  
 Use custom colors

Click **"Save"** **10**

🔄 [Reset Branding to Defaults](#)
📄 Save

10