PivotPrime

Enhancements Guide

January 2022

Contents

About this Guide

This Guide details how to use the features announced in the January 2022 release.

Adding Your Company Logo

You may include a logo or other image on PivotPrime PDFs. The image will display on the first page of all PDFs.

1. Click 'Default Report Setting'
2. 'Select file' button
   Find the image you want.
3. Image thumbnail displays
4. Click the 'X' in upper right

File Types Supported

- GIF
- JPG
- PNG

Need to delete the logo?
Click 'Delete Logo' to remove the selected image and PDFs will only display the name of your organization.

Need to change the logo? Click 'Select file' again to choose a different image. No need to delete the logo first.

Customizing PDF Labels

Follow these instructions to customize your PDF text labels:

1. Click 'Default Report Setting'
2. Enter the text for your labels
3. Click the 'Save' button
4. Click the 'X' in upper right

Labels Supported

- Account
- Activity
- Phase
- Task

Note – most customers only have Account and Activity.

You have selected 2 accounts

You can create reports with **Default Report Setting** or customize setting for some of your accounts selected in the grid below.

1

Account Selected
Rustin Group
Pacific Partners

Default Report Settings **4** ×

Setting Name	Value	
Page Size	Letter Portrait(8.5" x 11")	✎
Language	English	✎
Date Format	MM/dd/yyyy	✎
Currency Symbol	$	✎
Report Format	Standard with Expense Detail as Sub-li	✎
File Type	PDF	✎

Customer Field Captions:

Account	Organization
Activity	Job Number
Phase	
Task	

2

3 Save

Customer Logo:

Delete Logo   Select file

Ravenna Group

Statement of Reimbursable Expenses

Expenses with Dates Between: **08/29/2021** through **01/15/2022**

Billed to Organization: Rustin Group

Charged to Job Number: Technology Review Phase

Include or Exclude Images

PDFs may be generated with or without images. Choose the Report Format and create reports.