



PivotPrime

Enhancements Guide

January 2022

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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.

You have selected 2 accounts **1**

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

Account Selected	Report Setting	
Rustin Group	Customized	
Pacific Partners	Customized	

Default Report Settings

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-II	
File Type		

Default Report Settings **4**

Customer Field Captions:

Account: Organization

Activity: Job

Phase:

Task:

Customer Logo: **2**

Customer Logo: **3**

Statement of Reimbursable Expenses

Expenses with Dates Between: 08/29/2021 through 01/15/2022 Total Amount Billed: \$ 320.00

Billed to Client: Pacific Partners
Project Name: Shoreline
Project ID: Shoreline
Phase Name:
Task Name: null

Expense Type	#	Date	Type	Original Amount	Converted Amount	Billed Amount
Hotel	1	09/07/2021	Hotel	320.00 USD	\$ 320.00	\$ 320.00
Total					\$ 320.00	\$ 320.00

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

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-ll	
File Type	PDF	

Customer Field Captions:

Account: **2**

Activity: **2**

Phase:

Task:

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.

