

How to Add Custom header/footer

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Follow the steps below to guide you on how to add custom report header.

1. A new row will be available in the grid section.
2. In the **Type** field, select Custom.
3. Enter a value in the **Header/Footer Name** field. Since this is a custom header and footer type, the value entered here is what will be shown in the report when previewed/printed.
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5. In the **Alignment** field, set how the value for the column be displayed. Set this to Center.
6. In the **With** field, select Page. This will occupy the entire page.
7. Leave **Column Description** field blank.

This is how Custom header/footer setup will look like.

The screenshot shows a window titled "Report Header and Footer - Test Header Company". It has a menu bar with "New", "Save", "Search", "Delete", "Undo", "Duplicate", "Options", and "Close". Below the menu bar are two tabs: "Details" (selected) and "Audit Log". The "Details" tab contains several input fields: "Name" (Test Header Company), "Description" (Test Header Company), "Type" (Report Header), and "Column Name". Below these fields is a toolbar with "Remove", "Up", "Down", "Export", "View", and a "Filter (F3)" input. The main area is a table with columns: "Type", "Header/Footer Name", "Row Number", "Alignment", "With", "Column From", and "Column To". The table has one row with "Custom" type, "Test I21 Company" name, "1" row number, "Left" alignment, and "Page" width. There is a checkbox to the left of the table.

Type	Header/Footer Name	Row Number	Alignment	With	Column From	Column To
Custom	Test I21 Company	1	Left	Page		

Select this Report Header in the Report Builder and make sure that the checkbox before it is checked when printing/previewing the report.

The screenshot shows a window titled "Report Builder - Balance Sheet - June 25, 2019 17:53:56". It has a menu bar with "New", "Save", "Search", "Delete", "Undo", "Duplicate", "Generate", and "Close". Below the menu bar are four tabs: "Details" (selected), "Runtime Log", "Financial History", and "Audit Log". The "Details" tab contains several input fields: "Report Name" (Balance Sheet - June 25, 2019 17:53:56), "As of Date" (06/25/2019), "Row" (Balance Sheet - June 25, 2019 17:53:56), "Segment Filter", "Column" (Balance Sheet - June 25, 2019 17:53:56), "Description" (Standard Balance Sheet Template), and "Orientation" (Portrait). Below these fields is a section titled "Header & Footer" with four rows: "Page Header", "Page Footer", "Report Header" (checked), and "Report Footer". The "Report Header" row has a value of "Test Header Company".

Header & Footer	
Page Header	
Page Footer	
Report Header	Test Header Company
Report Footer	

Here's how it is shown when report is previewed/printed. Highlighted section is the Custom type header/footer. Since this is a report header, this will show on the first page of the report only.

Test i21 Company				
	Current Year	Current Units	Prior Year	Prior Units
Asset				
Asset	36,886,600	28,888,448	36,784,018	28,888,448
Cash Accounts	-79,545,020	-29,108,521	-78,466,735	-29,108,477
Receivables	25,035,157	3,739,651	24,712,446	3,692,276
Prepays	1,790,236	3,022,819	1,790,236	3,022,819
Inventories	1,120,448,855	79,188,581	849,891,599	72,783,243
Other Assets	-1,468,117	-8,023,023	-1,455,776	-7,091,840
Total Assets :	1,103,147,711	77,707,955	833,255,788	72,186,469
Liability				
Liability	280,527	8	271,752	8
Payables	36,218,273	2,986,400	11,622,715	-412,393
Other Payables	981,190,200	53,077,903	736,208,705	51,305,985
Sales Tax Payables	861,468	0	861,438	0
Payroll Tax Liabilities	496	0	496	0
Pending Payables	554,020	242,238	415,437	151,163
Payroll Taxes Current	203,601	0	200,993	0
Payroll Deductions	42,521	0	41,749	0
Employer Liability	76,430	-4	75,335	-4
Total Liabilities :	1,019,427,536	56,306,545	749,698,620	51,044,759

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Sample Company				
	Beginning Balance	Total Debit	Total Credit	Ending Balance
10000-0000-000 - Wells Fargo - Disbursement - Home office - Admin	6,973,127.02	0.00	0.00	6,973,127.02
10000-9002-006 - Wells Fargo - Disbursement-Austin Tech Hub-Gas	(231,889.21)	0.00	0.00	(231,889.21)
10001-0000-000 - Wells Fargo - Payroll - Home office - Admin	(2.50)	0.00	0.00	(2.50)
10001-0003-000 - Wells Fargo - Payroll - Richmond - Admin	513.18	0.00	0.00	513.18
10002-0000-000 - Fifth Third - AG Operations - Home office - Admin	(67,406.62)	0.00	0.00	(67,406.62)
10003-0000-000 - Fifth Third - Petro Operations - Home office - Admin	(35,677,355.03)	0.00	0.00	(35,677,355.03)
10003-0007-000 - Fifth Third - Petro Operations-Port Albert-Admin	52,558.69	0.00	0.00	52,558.69
10003-0007-001 - Fifth Third - Petro Operations-Port Albert-Grains	23,574.00	0.00	0.00	23,574.00
10003-0007-002 - Fifth Third - Petro Operations-Port Albert-Chemicals	(1,972.00)	0.00	0.00	(1,972.00)
10003-0007-003 - Fifth Third - Petro Operations-Port Albert-Fertilizer	52,588.90	0.00	0.00	52,588.90
10003-0007-004 - Fifth Third - Petro Operations-Port Albert-Petro	(70,975.09)	0.00	0.00	(70,975.09)
10003-0007-006 - Fifth Third - Petro Operations-Port Albert-Gas	62,409.02	0.00	0.00	62,409.02
10003-0101-001 - Fifth Third - Petro Operations-iRely Mart-Grains	1,000.00	0.00	0.00	1,000.00
10003-0101-003 - Fifth Third - Petro Operations-iRely Mart-Fertilizer	(50,000.00)	0.00	0.00	(50,000.00)
10003-0102-007 - Fifth Third - Petro Operations-Dubai Emirates-Diesel	1,000.00	0.00	0.00	1,000.00
10003-0103-003 - Fifth Third - Petro Operations-Amman - Jordan-Fertilizer	1,000.00	0.00	0.00	1,000.00
10003-0103-007 - Fifth Third - Petro Operations-Amman - Jordan-Diesel	1,000.00	0.00	0.00	1,000.00
10003-9000-003 - Fifth Third - Petro Operations-Silicon Valley -Fertilizer	2,000.00	0.00	0.00	2,000.00
10003-9000-005 - Fifth Third - Petro Operations-Silicon Valley -Feed	60.00	0.00	0.00	60.00
10004-0000-000 - Three Rivers - Operating - Grain - Home office - Admin	(12,785,539.42)	0.00	0.00	(12,785,539.42)
10005-0000-000 - Chase- Cash in Bank - Home office - Admin	(3,256,699.17)	0.00	0.00	(3,256,699.17)
10005-9002-006 - Chase- Cash in Bank -Austin Tech Hub-Gas	(41,029,906.40)	0.00	0.00	(41,029,906.40)
10006-0000-000 - Canadian Cash - Home office - Admin	46,233,475.62	0.00	0.00	46,233,475.62
10006-9001-007 - Canadian Cash-Boston Tech Hub-Diesel	(1.08)	0.00	0.00	(1.08)
10010-0000-000 - Common Capital - Home office - Admin	(10,194,650.00)	0.00	0.00	(10,194,650.00)
10011-0000-000 - Cash on hand-Home office-Admin	(26,819.19)	0.00	0.00	(26,819.19)
10013-0000-000 - Cash on hand-Home office-Admin	(50.00)	0.00	0.00	(50.00)
10051-0000-000 - Cash offset-Home office-Admin	50.00	0.00	0.00	50.00
10242-0000-000 - Beginning Inventory - Home office - Admin	2,025.00	0.00	0.00	2,025.00
10242-0007-001 - Beginning Inventory-Port Albert-Grains	(5,000.00)	0.00	0.00	(5,000.00)
10243-0000-000 - Ending inv - Home office - Admin	24,750.00	0.00	0.00	24,750.00
10500-0000-000 - Undeposited Funds - Home office - Admin	472,345.17	0.00	0.00	472,345.17
10500-0001-000 - Undeposited Funds - Fort Wayne - Admin	62,501.14	0.00	0.00	62,501.14
10500-0003-000 - Undeposited Funds - Richmond - Admin	(1.00)	0.00	0.00	(1.00)
10500-0004-000 - Undeposited Funds - South Bend - Admin	(1.00)	0.00	0.00	(1.00)
10500-0101-000 - Undeposited Funds - iRely Mart - Admin	2.00	0.00	0.00	2.00

You can enhance this header/footer by setting its **Font Properties** and **Row Height**. See [How to Configure header and footer font properties and row height](#) topic to guide you on how to do this.

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Report Header and Footer - Custom Header

New Save Search Delete Undo Duplicate Options Close

Details Audit Log

Name * Custom Header Description Test Company Header

Type * Report Header Column Name

Remove Up Down Export View Filter (F3)

Type*	Header/Footer Name	Row Number*	Alignment	With	Column Description
☒	Custom	i21 Test Company	1	Center	Page
☐					

Select this Report Header in the Report Builder and make sure that the checkbox before it is checked when printing/previewing the report.

Report Builder - Balance Sheet - X

New Save Search Delete Undo Duplicate Generate Close

Details Runtime Log Financial History Audit Log

Report Name * Balance Sheet - X As of Date 04/06/2020

Row Balance Sheet - April 06, 2018 16:30:58 Segment Filter

Column Balance Sheet - April 06, 2018 16:30:58 Description Standard Balance Sheet Template Test

Orientation * Portrait

Header & Footer

☐ Page Header ☐ Report Header Custom Header

☐ Page Footer ☐ Report Footer

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i21 Test Company				
	03/31/2020 - 04/27/2020	03/31/2020 - 05/27/2020	04/28/2020 - 05/27/2020	03/31/2020 - 04/27/2020
Asset				
Liability				
Equity				
Retained Earnings	77,050,828	791,011	77,050,828	791,011
Total Equity :	77,050,828	791,011	77,050,828	791,011
Total Equity :	77,050,828	791,011	77,050,828	791,011
Total Liabilities and Equity :	77,050,828	791,011	77,050,828	791,011

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i21 Test Company				
Income Statement A				
As Of 12/31/2015				
Row ID	Row Name	2015	2014	Total
R4	Revenue	18,329.75	1,000.00	19,329.75
R5	Expense	16,952.74	0.00	16,952.74
R7	Net Income	1,377.01	1,000.00	2,377.01

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Report Header and Footer

Name: RH Description: Report Header

Type: Report Header Column Name:

Description	Type	Group	Alignment	With	Column Description
Report Title	Report Title	1	Center	Page	
Sample Company	Custom	2	Center	Page	
Date Range	Date Range	3	Center	Page	

Select this Report Header in the Report Builder and make sure that the checkbox before it is checked when printing/previewing the report.

Report Builder

Report Name: Income Statement Description: Income Statement by Account

Row: IS Column: Prev-Cur Orientation: Portrait

Header & Footer

☒ Page Header: ☒ Report Header: RH

☐ Page Footer: ☐ Report Footer:

Margins

Top: 5 Bottom: 5 Left: 5 Right: 5

Options

☐ Show Default Header & Footer ☒ Show Report Settings

Here's how it is shown when report is previewed/printed. Highlighted section is the Custom type header/footer.

Income Statement				
Sample Company				
As Of 4/14/2015				
		2014	2015	Total
R1	40000 - Sales	1,000.00	4,400.00	5,400.00
R2	50000 - Cost of Goods Sold	150.00	1,200.00	1,350.00
R7	Gross Margin	850.00	3,200.00	4,050.00
R9	Gross Margin Rate	85.00%	72.73%	75.00%
R4	60000 - Other Expenses	50.00	980.25	1,030.25
R6	70000 - Other Revenues	0.00	200.00	200.00
R11	Net Income	800.00	2,419.75	3,219.75

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Report Header and Footer

NewSaveSearchDeleteUndoDuplicateFontsClose

Name: RHDescription: Report Header

Type: Report HeaderColumn Name:

DeleteUpDownFilter Records (F3)

Description	Type	Group	Alignment	With	Column Description
	Report Title	1	Center	Page	
MY Company	Custom	2	Center	Page	
	Date Range	3	Center	Page	

Select this report header/footer in the Report Builder and make sure that checkbox before it is checked when printing/previewing the report.

Report Builder

NewSaveSearchDeleteUndoGenerateClose

Report Name: ISSDescription: This is an Income Statement Summary.

Row: ISSColumn: Prev-CurOrientation: Portrait

Header & Footer

Page Header:

☒ Report Header: RH

Page Footer:

Report Footer:

Margins

Top: 5Bottom: 5Left: 5Right: 5Gutter: 0

Options

Show Default Header & Footer

☒ Show Report Settings

Edited

Page 1 of 1

Here's how it is shown when report is previewed/printed. Highlighted section is the Custom type report header.

Income Statement		
MY Company		
As Of 12/31/2014		
	2013	2014
Sales	4,260.00	4,960.00
Less: COGS	1,110.00	1,510.00
Gross Profit	3,150.00	3,450.00
Gross Profit Rate	73.94%	69.56%
Less: Expenses	486.00	990.00
Add: REvenues	1,050.00	1,416.00
Net Income (Loss)	3,714.00	3,876.00

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