

REBEL SOFTWARE · RebelPSA

# Brand Board Guide

Managing multiple brand identities — logos, colors, and contact details — under a single RebelPSA tenant.

|                   |                              |
|-------------------|------------------------------|
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## About This Guide

This guide covers Brand Boards — RebelPSA's mechanism for representing more than one market-facing identity under a single tenant. It's written for administrators who set up and manage Brand Boards, and for technicians who'll see brand scoping show up in tickets, queues, SLAs, and a few other places day to day.

**Tip.** Every tenant has at least one Brand Board from day one — a seeded "Default" board covering all surfaces — whether or not you ever think about multiple brands. This guide is important if you operate more than one brand, and is useful background even if you don't.

## What a Brand Board Is (and Isn't)

A Brand Board is a top-level organizational identity: a name, a set of contact details, a visual identity kit, and a set of surfaces (Help Desk, Marketing, Sales, Finance) it applies to. If your organization operates under one name, you'll likely never need to think about this beyond the seeded Default board. If you operate under multiple brands — a holding company with acquired subsidiaries, or distinct market-facing names — each one gets its own Brand Board.

A few things are worth clarifying up front, since it's easy to confuse a Brand Board with other, similarly named settings elsewhere in RebelPSA:

- **A Brand Board is not the same as Customer Portal branding.** The Customer Portal has its own independent branding configuration (its own logo, colors, and custom domain), managed separately. See Section 8.
- **A Brand Board does not currently support its own custom domain.** The closest available field is a plain public Website URL — not a login or portal domain. A dedicated custom-domain-per-Brand-Board capability is planned for a future release, but isn't built yet.
- **A Brand Board has no Description field.** That field lives on a related but separate concept called Brand Scope (Section 5.2), not on the Brand Board itself.

## Brand Board Fields: What You Can Configure

The following fields are real, implemented, and editable on a Brand Board today:

| Field | Notes                           |
|-------|---------------------------------|
| Name  | Required, up to 128 characters. |

| Field                            | Notes                                                                                                                                                                                                                                                                        |
|----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Code (3 letters)</b>          | Exactly 3 letters, unique per tenant. This is the prefix that shows up in your ticket numbers — the reason two brands under the same tenant show visibly different ticket ID prefixes.                                                                                       |
| <b>Default Board</b>             | One Brand Board per tenant is marked as the default. The default board cannot be deleted.                                                                                                                                                                                    |
| <b>Active</b>                    | Whether the board is currently in use. Defaults to active.                                                                                                                                                                                                                   |
| <b>Country</b>                   | A supported country (currently US, CA, AU, GB, with more planned) — used to format the phone number field below.                                                                                                                                                             |
| <b>Website URL</b>               | A public website address. This is informational only — not a login domain or portal domain.                                                                                                                                                                                  |
| <b>Support Email, Main Phone</b> | Contact details shown wherever this brand's identity is surfaced -- for example, signatures and survey emails.                                                                                                                                                               |
| <b>Logos</b>                     | Large logo, small logo, favicon, and a separate dark-mode logo — each uploaded and stored as a file, not a pasted URL.                                                                                                                                                       |
| <b>Color Kit</b>                 | Primary, secondary, accent, background, and text colors, plus an open-ended list of additional named colors. Edited with color pickers and a live preview in the editor.                                                                                                     |
| <b>Fonts</b>                     | A heading font and a body font, chosen from a curated list in the editor.                                                                                                                                                                                                    |
| <b>Footer Details</b>            | A physical address, a legal disclaimer, and social links — used in footers wherever this brand's identity is applied.                                                                                                                                                        |
| <b>Outbound Email Identity</b>   | From name, from address, reply-to address, plus an HTML and plain-text signature.                                                                                                                                                                                            |
| <b>Communications Links</b>      | A sender identity and a sending domain from the Communications module can be associated with a Brand Board. These are stored on the board, but the actual send path resolves through a Sending Profile — the association doesn't yet drive live outbound sending on its own. |
| <b>Surface Availability</b>      | Four independent flags: available in Help Desk, Marketing, Sales, and Finance. A newly created board defaults to Help Desk only; opening it up to other surfaces is a separate, explicitly permissioned action. The seeded Default board is available everywhere.            |

**Tip.** Two heading/body font URL fields exist on the underlying record and are preserved if already set, but the current editor doesn't expose them for you to change — if you need custom font files rather than the curated font list, raise this with an administrator who can set it directly.

**Important.** Two fields you might reasonably expect do not exist on a Brand Board: a free-text Description, and a custom domain. If you're looking for either of these, you're likely thinking of Brand Scope (Section 5.2) or Customer Portal branding (Section 8) respectively.

## Managing Brand Boards

### Where to Find It

Brand Boards live under Administration -> Branding, on a dedicated list page. Opening a specific board takes you to its detail page, covering its overview, its uploaded assets, and its inbound email routing rules.

### Permissions

| Action                                              | What's Required                                                                                                                  |
|-----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| View the Brand Board list and detail pages          | View permission                                                                                                                  |
| Create a new Brand Board                            | Create permission -- plus the scope-management permission below if you also want to open it up beyond Help Desk at creation time |
| Edit an existing board                              | Edit permission -- plus scope-management permission if you're changing which surfaces it's available on                          |
| Delete a board                                      | Delete permission — blocked entirely for the default board                                                                       |
| Change which board is the default                   | A separate, dedicated permission                                                                                                 |
| Upload or remove a logo, favicon, or dark-mode logo | Edit permission                                                                                                                  |

**Tip.** Large and dark-mode logo files are served without requiring the viewer to be logged in — this is deliberate, since these images need to render in places like public-facing survey emails and PDFs where the recipient isn't a RebelPSA user. Small logo and favicon files still require view access.

## Creating a New Brand Board

- Go to Administration -> Branding and choose New Brand Board.
- Fill in the required basics: name, a unique 3-letter code, and country.
- Add contact details, colors, fonts, and footer content as needed — all of this can also be filled in or adjusted later.
- Choose which surfaces (Help Desk, Marketing, Sales, Finance) the board should be available on, if different from the Help Desk-only default.
- Save. The board is created immediately.
- Open the new board's detail page to upload its logos and configure any inbound email routing rules.

A couple of constraints worth knowing going in: the 3-letter code must be unique within your tenant, only one board can be the default at a time, and setting a board as default is a separate, explicit action from editing it.

## Brand Scoping: Two Different Models

Once you have more than one Brand Board, other parts of RebelPSA need a way to say "this belongs to Brand X" or "this applies to every brand." RebelPSA uses two distinct mechanisms for this, and it's easy to mix them up.

### 5.1 Single Brand Board Assignment

Some records simply carry a direct reference to one specific Brand Board:

| Record Type                                           | How It Works                                                                                                                                                                                           |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Ticket</b>                                         | Every ticket requires a Brand Board. If one isn't explicitly set at creation, RebelPSA resolves it to your tenant's default Help Desk-scoped board automatically — a ticket is never left without one. |
| <b>Ticket list filters</b>                            | Optional — leaving it unset simply means no brand filter is applied.                                                                                                                                   |
| <b>Booking pages</b>                                  | Optional — a page can be tied to a specific brand or left unassigned.                                                                                                                                  |
| <b>Survey templates and dispatches</b>                | Optional.                                                                                                                                                                                              |
| <b>Marketing campaigns, templates, and activities</b> | Optional — unset resolves through the campaign, template, or a default Marketing-scoped board.                                                                                                         |
| <b>Ticket numbering sequences</b>                     | Optional — unset means the sequence is tenant-wide rather than brand-specific.                                                                                                                         |

**Tip.** For this model, there's no special "All Brands" Brand Board record — the absence of a value (null) is what represents "not tied to a specific brand."

## 5.2 Brand Scope (Named, Many-to-Many)

A handful of areas need something more flexible than a single brand — the ability to say "this applies to these three brands" or explicitly "this applies to all brands, including ones added later." These use a different underlying concept called Brand Scope:

| Record Type                   | How "All Brands" Works                                                                                                                                                                                                    |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Queues</b>                 | Carries a list of Brand Board IDs. An empty list means no brand filter — effectively all brands — rather than a special record.                                                                                           |
| <b>SLA Definitions</b>        | Reference a named Brand Scope. Every tenant is automatically seeded with a system-managed Brand Scope literally named "All Brands," which has no specific members and matches every ticket regardless of its Brand Board. |
| <b>Contracts / Agreements</b> | Use the same named Brand Scope concept as SLAs, including the same seeded "All Brands" system scope.                                                                                                                      |

**Important.** There is no Brand Board row that itself means "All Brands." That idea only exists as either an empty list (Queues) or a dedicated system-managed Brand Scope record (SLAs and Contracts). If you're looking for an "All Brands" option in a Brand Board picker specifically, it isn't there — it's a property of the scope, not the board.

## Where Brand Scoping Is Actually Enforced

Referencing a Brand Board and filtering or theming it are two different things. The table below is a direct account of which modules do which, as of this guide:

| Module         | Enforced Today?                                                                                                                    |
|----------------|------------------------------------------------------------------------------------------------------------------------------------|
| <b>Tickets</b> | Yes — every ticket requires a resolved Brand Board, list views can filter by it, and ticket numbers use the board's 3-letter code. |
| <b>Queues</b>  | Yes — a queue's brand list actively filters which tickets appear in it; an empty list means no filtering.                          |
| <b>SLA</b>     | Yes — SLA cascade resolution checks whether a ticket's Brand Board falls within the SLA's Brand Scope before that SLA can apply.   |

| Module                                   | Enforced Today?                                                                                                                                                                                                |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Contracts / Agreements</b>            | Yes — brand scope narrowing is enforced relative to the parent agreement's scope.                                                                                                                              |
| <b>Mailbox routing</b>                   | Yes — inbound email routing can resolve and assign a Brand Board (or fall back to a profile default) when creating a ticket.                                                                                   |
| <b>Communications (inbound)</b>          | Yes — inbound email routing rules can match a message to a specific Brand Board.                                                                                                                               |
| <b>Communications (outbound)</b>         | Stored only — a Brand Board can be linked to a sender identity and sending domain, but the live send path currently resolves through a Sending Profile, not through the Brand Board link.                      |
| <b>Marketing</b>                         | Yes for eligibility — a campaign resolves to a Brand Board and respects the Marketing-availability flag. Template HTML itself is not automatically re-colored to match the resolved brand's color kit.         |
| <b>Survey</b>                            | Partially — a Brand Board's identity (from-name, logo, support contact) is applied to survey emails, but it isn't used as a list filter.                                                                       |
| <b>Scheduling (booking pages)</b>        | Stored only — an admin can assign a Brand Board to a public booking page, but the public-facing page currently doesn't filter or visually theme based on it.                                                   |
| <b>Sales documents (quotes/invoices)</b> | Partially, and not quite as you'd expect — PDFs use your tenant's default active Brand Board's large logo and a separate Sales color setting, not the specific quote's own brand or the board's own color kit. |
| <b>Finance</b>                           | Not referenced — the Finance-availability flag exists on the Brand Board, but nothing in Finance currently reads it.                                                                                           |
| <b>Service Boards</b>                    | Not modeled — Service Boards have their own color/icon, entirely separate from Brand Board.                                                                                                                    |
| <b>Customer Portal</b>                   | Independent — the portal uses its own separate branding configuration; a ticket created from the portal can optionally carry a Brand Board, but portal appearance itself doesn't come from it.                 |

**Tip.** If something brand-related doesn't seem to be "working" the way you'd expect — a booking page not showing the right logo, a quote PDF using the wrong color — check this table first. In several cases, that's expected current behavior rather than a bug: the field exists and is stored, but the rendering or filtering logic hasn't been wired up to it yet.



## Where a Brand Board's Look Actually Renders

A Brand Board's color kit is fully editable and previewed live in the admin editor — but today, that preview is largely where it stays. Here's exactly where a Brand Board's visual identity does and doesn't show up outside the admin screen itself:

| Surface                   | Logo?                                                               | Colors?                                             |
|---------------------------|---------------------------------------------------------------------|-----------------------------------------------------|
| Admin login page          | No                                                                  | No                                                  |
| Customer Portal           | No — uses the Portal's own separate logo                            | No — uses the Portal's own separate color variables |
| Public booking page       | No                                                                  | No                                                  |
| Sales quote / invoice PDF | Yes — the tenant's default board's large logo                       | No — uses a separate Sales color setting instead    |
| Survey invitation email   | Yes                                                                 | No — styling is currently fixed regardless of brand |
| Help Desk snippets        | Partial — signature and contact fields available as merge variables | No — colors aren't exposed as merge variables       |
| Marketing email body      | Depends on how the template itself was authored                     | No — not auto-applied from the resolved brand       |

**Important.** *In short: the color kit is a real, stored, and previewable part of every Brand Board, but it is not yet a live theme engine anywhere in the product. If your goal is to have a specific brand's colors showing up on a customer-facing page today, that isn't currently possible through Brand Board configuration alone — logos have some outbound presence, but colors are effectively admin-preview-only for now.*

## Brand Board vs. Customer Portal Branding

These are two genuinely separate systems that happen to sound similar, and they're managed in two different places:

|  | Brand Board | Customer Portal Branding |
|--|-------------|--------------------------|
|--|-------------|--------------------------|

|                              |                                                                                                 |                                                                                              |
|------------------------------|-------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| <b>Where it's managed</b>    | Administration -> Branding                                                                      | Administration -> Customer Portal                                                            |
| <b>Covers</b>                | Name, contact info, logos, colors, fonts, footer, outbound email identity, surface availability | Portal name, logo, colors, custom CSS, login background, and (uniquely) a real custom domain |
| <b>Custom domain support</b> | Not currently available                                                                         | Available — this is the one place a genuine custom domain exists today                       |
| <b>Used by</b>               | Tickets, Queues, SLA, Contracts, Marketing, Survey, Mailbox routing                             | The Customer Portal application specifically                                                 |

**Tip.** *If what you actually want is a client-facing portal at your own domain with your own look and feel, that's Customer Portal branding, not Brand Board — even though a ticket created from the portal can separately carry a Brand Board reference for internal routing purposes.*

## Common Workflows

### Setting up a second brand after an acquisition

- Create a new Brand Board with a distinct 3-letter code so its tickets are visibly distinguishable.
- Upload its logos and set its color kit, understanding that colors will preview in admin but won't yet theme customer-facing pages.
- Set its surface availability (Help Desk at minimum; add Marketing/Sales/Finance as needed).
- Configure inbound email routing on the new board's detail page so mail for that brand resolves correctly.

### Investigating why a queue shows tickets from the wrong brand

- Open the queue's brand configuration and check its Brand Board list.
- Remember: an empty list means no filtering at all (all brands show), which is easy to mistake for a bug.
- Add the specific Brand Board(s) that should be included if the queue should actually be brand-restricted.

## Explaining an SLA that applied when you expected a brand-specific one

- Check the SLA Definition's Brand Scope.
- If it's the system "All Brands" scope, it will match every ticket regardless of Brand Board — that's expected, not a resolution error.
- Create or select a narrower Brand Scope if the SLA should genuinely be limited to specific brands.

## Common Misconceptions

- **"I'll just add a description to the Brand Board."** There isn't one. Descriptions live on Brand Scope, a separate concept used by SLAs and Contracts.
- **"I'll set a custom domain on the Brand Board."** Not currently possible. The closest available field is a plain public Website URL. Currently a real custom domain exists only for the Customer Portal.
- **"There should be an 'All Brands' option when I pick a Brand Board."** Not as a Brand Board itself. It's either an empty list (Queues) or a dedicated system Brand Scope (SLAs, Contracts).
- **"I set colors on the Brand Board, so my booking page should reflect them."** Not yet. The color kit currently renders only in the admin preview — no customer-facing surface applies it live.
- **"TenantBranding must be the same as Brand Board."** They're not the same thing, and TenantBranding is not currently an available feature, but may show up elsewhere in reference to future features.

## Quick Reference & Glossary

| Term                        | Meaning                                                                                                                                                       |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Brand Board</b>          | A tenant's representation of one market-facing brand identity: name, contact info, logo kit, colors, fonts, and the surfaces it's available on.               |
| <b>Code (3-letter)</b>      | The unique per-tenant 3-letter prefix used in that brand's ticket numbers.                                                                                    |
| <b>Brand Scope</b>          | A separate, named concept (used by SLAs and Contracts) representing either specific member Brand Boards or the system-managed "All Brands" scope.             |
| <b>Surface Availability</b> | The four independent flags controlling whether a Brand Board can be used in Help Desk, Marketing, Sales, and Finance.                                         |
| <b>Default Brand Board</b>  | The one board per tenant marked as default; used as the fallback when nothing else resolves a brand and cannot be deleted.                                    |
| <b>Sending Profile</b>      | The Communications module concept that controls outbound email delivery — distinct from (and not currently driven by) a Brand Board's linked sender identity. |

| Term                            | Meaning                                                                                           |
|---------------------------------|---------------------------------------------------------------------------------------------------|
| <b>Customer Portal Branding</b> | A separate branding system for the Customer Portal, including its own real custom domain support. |