



BEACONSHIRE ADVISORY

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White-Label Workflow for Advisors

BRANDING CUSTOMIZATION GUIDE

Make It Your Own

A complete walkthrough for re-delivering this package
under your own firm's brand.

For accountants, bookkeepers, fractional CFOs, and advisors
who want to ship this system to their clients — fully branded.

INTRODUCTION

Why This Guide Exists

You are an accountant, bookkeeper, fractional CFO, or advisor. You want to hand the Cash Flow Command Center to your clients — but not looking like someone else's product. This guide shows you exactly how to re-skin every component of the package so it reads as a native deliverable from your firm.

We built the package to be customized. The dashboard exposes a Brand Panel with one-click theming. The Excel template isolates every brand element on a dedicated sheet. The PDFs — this one and the Implementation Playbook — can be re-rendered with your firm's colors, logo, and footer by anyone with basic Python.

Total time to fully white-label the package, start to finish, averages about forty-five minutes.

Before you begin, gather four things

1) Your firm's logo as a transparent PNG or SVG, minimum 400px wide. 2) Your brand's primary color and accent color as hex values. 3) Your firm's name and a one-line tagline. 4) Your website URL and a contact email address. Having these four items in front of you before you start will cut the customization time roughly in half.

What's Included

This guide covers customization of three components:

- The interactive browser dashboard
- The Excel template workbook
- The two companion PDFs (Implementation Playbook + this guide)

The marketing assets (Instagram reel scripts, landing page copy, and email sequences) ship with their own internal customization notes in the Marketing Kit.

PART 01 · DASHBOARD CUSTOMIZATION

Customizing the Interactive Dashboard

The dashboard was built to re-skin without touching a line of code. Every brand element lives behind a single Brand Panel accessible via the gear icon in the top-right corner.

Opening the Brand Panel

Click the gear icon in the top-right of the dashboard. The Brand Panel slides in from the right with six fields:

Firm name	Replaces the “Beaconshire Advisory” text in the top-left of the dashboard and every print export.
Tagline	The single-line descriptor under the firm name. Keep this to eight words or fewer.
Logo	Upload a PNG or SVG. The dashboard will base64-encode it in state; it persists for the session but is not uploaded to any server.
Primary color	The main brand accent. Used for the runway line, positive cash indicators, and primary buttons. Enter any hex value.
Accent color	Secondary highlight color. Used for chart gradients, tab underlines, and the Brand Panel trim.
Preset palettes	Six one-click color schemes: Beaconshire (default), Forest, Burgundy, Charcoal, Slate, and Bronze. Clicking a preset overwrites both color fields.

Persistence & Sharing

Because the dashboard runs entirely in the browser with no backend, customizations persist only for the active session. When you hand the dashboard to a client, send them the file with your logo already embedded — either export a pre-branded HTML snapshot or have them re-upload their logo on first open. The color palette and firm name survive a browser refresh.

Reset to Beaconshire

The Brand Panel includes a Reset button that restores the default Beaconshire theme. If you're demo'ing the tool to a prospect and want to show the original look, that's your one-click path back.

PART 02 • EXCEL TEMPLATE CUSTOMIZATION

Customizing the Excel Workbook

The Excel template is structured so that every brand element lives in one of three places: the Cover sheet, the Branding Guide sheet, or the workbook footer. Change these three and the entire workbook is re-branded.

Five-Step Walkthrough

- 1 Swap the cover logo**

Open the workbook. Navigate to the Cover tab. Right-click the Beaconsire logo and select Change Picture. Choose your firm's logo file. For best results, use a transparent PNG sized at least 400×400 pixels.
- 2 Update firm name and tagline**

Still on the Cover tab, double-click the firm name ("BEACONSHIRE ADVISORY") and replace with yours. Do the same for the tagline directly below it. Both are plain text cells — no formulas to worry about.
- 3 Replace the color palette**

Navigate to the Branding Guide sheet. The left column lists every color used in the workbook with its hex code. Replace the hex codes with your firm's colors. The workbook uses Excel's theme color system, so updating the hex values propagates throughout every sheet automatically.
- 4 Edit the footer**

On every tab, the footer reads "Beaconsire Advisory, LLC · beaconsireadvisory.com". To change this globally: Page Layout → Print Titles → Header/Footer → Custom Footer. Update the left-section text to your firm name and the right-section text to your URL. Apply to all sheets via the Entire Workbook print range.
- 5 Rename the file**

Save As → give the file a name that includes your firm. Recommended pattern: [FirmName]_CashFlow_Template_2026.xlsx. This becomes the filename your client sees in their downloads folder — make it land.

Named ranges are sacred

The workbook uses six named ranges (StartingBalance, StartDate, TaxRate, TargetRunway, WeeklyInflow, WeeklyOutflow) that connect the Inputs tab to the Forecast tab. Do not rename them. Do not delete the cells that define them. If you need to move them around, do it through Formulas → Name Manager, not by cutting and pasting cells.

PART 03 • COLOR SYSTEM REFERENCE

The Beaconsire Palette

Before you swap the palette, it helps to know what each color does. The Beaconsire system uses six colors; your firm's palette should map to these six roles for the customization to translate cleanly.

Deep Navy #0B1628	Beacon Blue #2E407C	Beacon Gold #C4AA72	Off-White #FDFEFE
Charcoal #212020	Slate Gray #B5B3B5	Paper #F7F5F0	Light Gold #EFE6D2

Deep Navy (#0B1628)

Primary brand color. Used on cover pages, headers, and any large background block. Swap to your firm's darkest brand color.

Beacon Blue (#2E407C)

Secondary navy. Used for sub-headers and accent lines. Swap to a color one or two shades lighter than your primary.

Beacon Gold (#C4AA72)

The critical accent. Used for highlights, buttons, corner brackets, and emphasis. Choose a warm color that contrasts strongly with your navy. Avoid pure yellow (too bright for document context).

Off-White (#FDFEFE)

Light text on dark backgrounds. Almost always stays the same. If your navy is significantly lighter, consider pure white.

Charcoal (#212020)

Body copy color on light backgrounds. Rarely needs to change — near-black text is universal.

Slate Gray (#B5B3B5)

Metadata, page numbers, secondary captions. A neutral mid-gray usually reads best here.

PART 04 • RE-RENDERING THE PDFS

Re-Branding the Companion PDFs

The Implementation Playbook and this Branding Guide are generated from Python scripts using the ReportLab library. If you have basic Python comfort — or a developer on staff — you can re-render both documents under your firm's brand in under ten minutes.

What You'll Need

- Python 3.8 or higher
- The reportlab library (pip install reportlab)
- The source files: build_playbook.py and build_branding_guide.py
- Your logo as a PNG at branding_assets/your_logo.png

The Three Sections to Edit

Both Python scripts expose three editable blocks near the top. Change these three and rebuild.

```
# 1. BRAND COLORS
NAVY      = colors.HexColor('#YourPrimary')
BEACON    = colors.HexColor('#YourSecondary')
GOLD      = colors.HexColor('#YourAccent')

# 2. LOGO PATH
LOGO_PATH = 'branding_assets/your_logo.png'

# 3. FIRM METADATA (inside cover_page function)
canv.drawString(x, y, 'YOUR FIRM NAME')
canv.drawString(x, y, 'Your tagline here')
```

Running the Rebuild

With the three blocks updated, rebuild from the command line:

```
$ python3 build_playbook.py
✓ Playbook saved: pdfs/Implementation_Playbook.pdf

$ python3 build_branding_guide.py
✓ Branding Guide saved: pdfs/Branding_Guide.pdf
```

Not comfortable with Python?

We offer a white-label rebuild service. Send us your logo, your hex codes, and your firm metadata; we'll return a fully re-branded set of PDFs (both Implementation Playbook and this guide) within two business days. Pricing: flat \$395 per firm, unlimited updates for 12 months. Email hello@beaconshireadvisory.com.

PART 05 • QUALITY CHECKLIST

Before You Ship

Before you deliver the customized package to a client, run through this checklist. Nothing on it is optional.

- Dashboard opens in the client's browser (test on Chrome, Safari, Firefox)
- Firm logo displays correctly in the top-left corner
- Color palette matches brand guidelines (primary, accent, both)
- Firm name and tagline are spelled correctly (read aloud)
- Footer shows correct URL and firm name on every page
- Excel template opens in both Excel and Google Sheets without errors
- Cover tab shows your logo, not Beaconsire's
- Branding Guide tab color swatches match your palette
- Named ranges still work — change StartingBalance, verify forecast recalculates
- Implementation Playbook PDF cover shows your firm name
- Playbook footer shows your firm name on every page
- Playbook contact email in closing is yours, not james@beaconsireadvisory.com
- Filename of every file includes your firm name
- Total package size is under 10MB for easy email delivery

One final check

Open the package on a different device than the one you built it on — ideally a device that has never seen the Beaconsire version. This is the single best way to catch residual branding that escaped your customization pass.

FINAL NOTE

A Word on Licensing

This package is offered free of charge for use with your own clients. You may re-brand it, edit it, extend it, and re-deliver it under your own firm's name. You may charge your clients for your time in delivering it.

You may not resell the un-customized package as your own product, distribute it on a platform that monetizes file downloads, or remove the legal disclaimers and limitation-of-liability text. That's it.

If your firm builds a modified version that you think should be the new default — a better collection script, a smarter forecasting formula, a clearer explanation of something — please send it to us. We incorporate community improvements into the next version and credit contributors.

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