

QUICKBOOKS TIPS CORNER

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Customizing reports

QuickBooks comes with many different default report options, but the default reports don't always have exactly what you are looking for.

Start with the report that comes the closest, no need to reinvent the wheel. (Some of the options discussed below will not be available in every report. Some of the Financial Reports do not allow users to add columns or create custom filters).

It is important to realize that Creating Custom Reports can sometimes be frustrating and there are many different options available, this tip is only to get you started in the right direction. Remember, the more you “play” with different reports, the more meaningful the information you can get to help you run your business efficiently & effectively.

When the report has loaded, do the following:

1. Click Modify Report in the left corner of the report.
2. Under the Display tab look to the Columns section & choose those fields that you would like to see on your report. Remember, the more you choose the harder the report will be to follow, so choose wisely. These will be the columns that display on your report.
3. Click the Filters tab. Look to the Choose Filter section for options. Make selections as needed. This option will allow you to choose certain items to display, such as a particular account number or customer. You can click OK to see how the report will look. Continue to change #2 and #3 until you get what you are looking for.
4. Once you have made changes in #2 & #3 and the report seems to be what you are looking for and if this report is one you plan to use regularly in the future, click the Memorize button at the top of the report. Type a meaningful name that you will be able to find in the future and if necessary, choose to put the report in a specific Report Group (you can create your own group names as well), then Click OK.
5. To find your report, Click Reports and Choose Memorized Reports. Look for your report under the list given. Be sure to look under the group if you saved it under one of those.

There are many other options to choose from under the Modify Report tab, this is just to introduce some of those available to you. Go ahead “play” with MANY reports and make your books give you information about your business.