How do I customize a report or graph?

Anytime you create a report or graph, you can customize it to display just the information that you want to see. You can change the layout, the date range, the accounts to include, and various other settings that vary from report to report.

1. Display the report or graph you want to change.
2. Click **Customize**.
3. Set the report dates.
   - Select another date if the default dates don't include the period you want.
   - For comparison reports, enter two date ranges for comparison.
   - For tax reports of schedule items, enter the tax year you want.
   - If the date range you want isn't in the default list, you can specify your own. In the Date range list, select Custom dates and enter the appropriate date range.
   - You can also set up Quicken to adjust to your fiscal year.

   ### Notes

   The date ranges you set here apply to just the report or graph you are viewing. If you want to change the default date ranges for all reports and graphs, change the preferences instead.
4. Click any of the tabs to make further changes. Click a topic below to learn more.
   - Display tab
   - Accounts tab
   - Categories tab
   - Payees tab
   - Tags tab
   - Category Groups tab
   - Securities tab
   - Actions tab
   - Security Types tab
   - Investing Goals tab
   - Advanced tab
5. Click **OK**.
6. Click **Save** to save the report. (Optional)
   - **Are my customizations saved with the report?**
     Yes. Quicken saves your customized settings and displays them the next time you rerun the report.

Notes

If the report or graph you end up with after customization is wider than standard printer paper, try modifying the print options.