View a minireport on a payee or category

About minireports

Minireports provide instant insights into your spending. Quicken provides two types of payee minireports and one type of category minireport. The payee minireport types differ only with regard to date range and grouping; see the notes below for a description of each type of report.

Minireports are not available from investment account transaction lists.

1. Open the account register that contains transactions with the payee or category you want to report on.
2. Depending on the type of minireport you want to run, select either the Payee or Category field in the transaction you want to work with.
3. Click the minireport buttonto the right of the selected field.
   - To create a category minireport in a split transaction
     - Hold your mouse over the word Split in the Category field.
     - In the Split Transaction flyover, click the minireport icon to the left of any category to view the minireport details.
4. Click the down arrow to select a date range from the predefined list. (Optional)
5. Where they are available, click the blue hyperlink(s) to examine specific transactions included in the report.
6. Click the Show Report button to view additional detail or to customize the report display. (Optiona)
   The Show Report button is not available for minireports that are accessed from graphs.

Notes

More about payee minireports

Quicken looks in all accounts for transactions that match the selected payee and time period. Quicken displays a minireport for the smallest time interval (last 30 days, last 60 days, last 90 days, and so on) that contains at least six matching transactions.

If fewer than six transactions are found, Quicken displays a three-year minireport, itemized by date.

If the current category is a transfer, Quicken includes only transactions from the current ("transfer from") account that match the selected payee and time period.

Payee minireports are available as flyovers from some locations in Quicken. For example, in any checking account register, a minireport shows the average of the last few payments for the selected payee.

More about category minireports

In the category minireport, Quicken displays the activity (payments and deposits) for the selected category over the time interval that you specify (last 30 days, last 60 days, last 90 days, and so on). For time intervals of 90 days or less, the minireport is subtotaled by payee. Otherwise, it is subtotaled by date.

How can I use minireports?

Use the information provided in payee and category minireports to answer questions such as the ones listed below.

- Did I already pay ...? (for example, my garbage bill)
- How much have I already spent this month for...? (for example, dining out)
- How much do I typically spend for...? (for example, a specific payee or category such as Megamart or grocery shopping)

What's the difference between the average and monthly average amounts?

- Average is the average of the total number of transactions shown in the report.
- Monthly average is the total divided by the number of months included in the report.

How do I clean up my data so that my minireports are more useful?

For redundant categories, use the merge and recategorize tools. Read the overview of Managing the way transactions are categorized if you need help determining when to recategorize and when to merge.

For redundant payees in existing transactions, use Find All. If you use online payment from within Quicken, either through Quicken Bill Pay or through the bill pay service of a financial institution, you won't be able to change the names of online payees (since that's how that payee is identified).

To standardize payee names in future downloaded transactions, use renaming rules.