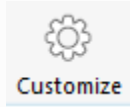# Reports and Graphs preferences

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ⓘ **I actually want to customize my report**

The instructions below are about setting report preferences, to make changes to an individual report, select **Customize** at the top of your report screen.

⚙️
Customize

For more information see How do I customize a report or graph?

You can change report and graph preferences such as the default date and comparison date ranges for all reports and graphs, how accounts and categories are identified in reports, whether color (**Colour** in Canada) is used in reports, and more.

1. Choose **Edit** menu > **Preferences**.
2. In the left pane, choose **Reports and Graphs**.
3. You can update any of the following:
   - **Default date range**
     Select a default date range or select **Custom dates** to set your own starting and ending dates for all reports and graphs. Quicken displays that range as the starting date range each time you create a report or graph, and adjusts the years of the From and To dates to put today's date within the range. For example, if today is 8/24/14, and you set the From and To dates to November 1 and November 30, Quicken will use the range from 11/1/14 to 11/30/14 when you create a report or graph.

     If you select the Include all dates or Earliest to date option in this dialog, the date range you see here might be different from the date range that you see when you run the report. This is because this dialog shows the date range for all the transactions in your data file, while a specific report shows the date range for the transactions in the accounts selected for that report. For example, if the earliest transaction in your Quicken data file is January 1, 2008, and you didn't start tracking your investments until April 26, 2011, when you select Earliest to date, this dialog shows January 1, 2008 as the starting date. When you run an investment report, Quicken shows April 26, 2011 as the starting date.

     > ⓘ The date ranges you set here apply to all reports and graphs. If you want to change the date range for just the report or graph you are viewing, customize the report or graph instead.

   - **Default comparison date range**
     Select a date range for the second time period for all comparison reports and graphs. You can select a default date range, a custom date (to set your own starting and ending dates), or a prior year period (to compare a specified time period to the same time period last year). Quicken displays that range as the comparison date range each time you create a comparison report or graph.
   - **Report toolbar**
     Select **Show icons** and text to include a text label on the **Report** toolbar icons.

     Select **Show icons** only to exclude a text label on the Report toolbar icons. If you hover over the icons you will get help on what they do.
   - **Customizing reports and graphs**
     Select Customizing creates new report or graph to retain the original report in the report history and add each customized version of the report to the history.

     Select Customizing modifies current report or graph to replace the original report with the customized version of the report in the report history.

     In any report window, click the Customize icon to open the Customize dialog. This can be helpful if you want to customize some settings before you run the report. (This setting doesn't apply to the reports you run from the Reports & Graphs window.)
   - **Cash-basis reporting if applicable (only in Quicken Business & Personal)**
     Select this check box to have Quicken automatically set to cash-basis every one of the applicable business reports, or click to clear this check box to have Quicken automatically set to accrual-basis every one of the applicable business reports. For more information about accrual- and cash-basis reports, see Choose accrual- or cash-basis reports.
4. Click **OK**.

Notes

The **Reports & Graphs** window is a popup window. This means that you can modify its behavior through the setup preferences, specifically the Automatically minimize popup windows check box. Click to clear this check box to display the **Reports & Graphs** window until you close it. Select the check box to minimize the **Reports & Graphs** window each time you run a report.