

How do I use the Categories tab to customize a report?

You can control which categories are included in a report or graph by modifying the categories selected in the Category list. To show or exclude hidden categories, use the **Show (hidden categories)** check box. You can also specify criteria that transactions must meet to appear in the report or graph.

Select Categories

In the **Type** category name to search list, type the name of the category you're looking for. Quicken displays the category that is the closest match in the **Category** list. If you want subcategories to appear in the list, click **Expand All**.

In the list of categories, select the categories and subcategories you want to include in the report or graph. Including a category or subcategory means that the transactions with that category or subcategory will be computed as part of the report or graph.

To include transactions with no category or subcategory assigned, select **Not Categorized**.

To include transfers between specific accounts, select the account names at the bottom of the list. You can also control the transfers in the report with the **Transfers list** on the **Advanced tab**.

Matching

Specify the **criteria** that transactions must meet to appear in the report or graph. For example, you can include only transactions with a specific payee by typing the payee's name in the **Payee** field.

Show (hidden categories)

Select this check box to include in the **Select Categories** list all the categories that are hidden in Quicken. When you do this, Quicken surrounds the name of hidden categories with parentheses and selects them in the **Select Categories** list. Quicken displays both the categories you've **hidden** in the Quicken Category List and the categories that Quicken hides by default (namely any Investment or mileage categories that begin with an underscore). If you don't want a specific hidden category included in report totals, clear the check box next to it.

Click to clear this check box to exclude from report totals the categories hidden in the Quicken **Category List** and by Quicken.

Show only new categories

Select this check box to show in the **Select Categories** list only the new categories you've added to Quicken since you last saved this report. For this check box to appear, the saved report must already include only a subset of the available categories. This is because the purpose of this check box is to identify only new categories that you might want to add to the existing subset. If the report already includes all categories by default, Quicken automatically includes the new category in the report.