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

You can modify a number of settings for reports and graphs on the **Advanced** tab. (Not all options are available for every type of report or graph.)

Amounts

Specify whether transactions must be a certain amount to be included in the report or graph.

If you don't want transaction amount to be a factor, select **All amounts.**

If you want only transactions that meet an amount criteria to appear in the report or graph, enter the appropriate amount and select whether Quicken limits the transactions to those less than, greater than, or equal to the amount you enter, and enter the amount by which to limit the transaction.

Include unrealized gains

Quicken displays this option only if you've set up investment accounts. Select this check box to have the report or graph show unrealized (paper) gains and losses. These gains and losses reflect increases and decreases in the values of your securities as their prices change.

Click to clear this check box to omit display of these unrealized gains.

Tax-related transactions only

Select this check box to include only those transactions categorized with tax-related categories.

Click to clear this check box to include all transactions (those categorized with tax-related categories as well as all other categorized transactions).

Transaction types

Specify the type of transactions to include in your report or graph. Your options are:

Payments: Includes payments only and included checks (**Cheques** in Canada). For nonbank accounts, payments are decreases to cash and other asset accounts, and increases to credit card and other liability accounts.

Deposits: Includes deposits only.

Unprinted Checks: Includes only unprinted checks.

All Transactions: Includes all transactions.

Status

Specify the status that transactions must have to appear in the report or graph.

To include transactions of all statuses in the report or graph, don't change or clear any of the check boxes. (Quicken selects all of the check boxes by default.)

To omit a transaction with a certain status from the report or graph, click to clear the check box. This can be useful if you want to create a report or graph that contains only cleared ("c"), uncleared, or reconciled ("R") transactions.

Transfers

Specify the transfers to include in the report or graph. Your options are:

Include all: Includes all transfers in the report or graph.

Exclude all: Excludes all transfers from the report or graph (use for a report or graph showing income and expenses without transfers, such as the business P&L statement report).

Exclude internal: Excludes transfers within accounts that are included in the report or graph (such as the opening balance or adjustment transactions).

Subcategories (income and expense or budget reports and graphs only)

Specify the subcategories to include in the report or graph. Your options are:

Show all: Includes all subcategories and groups them under their main categories. Subcategories are indicated and separated by a colon (:), for example, Auto:Fuel.

Hide all: Hides all subcategories.

Categories (budget reports and graphs only)

Specify the categories to appear in the report or graph. Your options are:

Include all: Includes all categories (even unused ones) in the report or graph.

Non-Zero actual/budgeted: Includes categories that you've used, or categories to which you've assigned budget amounts in the **Budget** dialog.

Budgeted only: Includes only those categories to which you've assigned budget amounts in the Budget dialog.

Show me change alerts for this report

Select this check box to have Quicken alert you when you're recalling a saved report to which new categories, tags, or securities might apply. For this alert to apply, you must have already saved the report after customizing it to include only a subset of the available categories, tags, or securities. This is because the purpose of this alert is to check whether the new item should be added to the subset included in the report. If the saved report already includes all categories, tags, or securities by default, Quicken automatically includes the new items in the report without first displaying an alert.

Tax form (only in **Quicken Business & Personal**)

Quicken displays this list only if you've set up Quicken to use tax schedules with categories.

Select the tax schedule line item to which you want to assign your category. If you select a tax schedule line item for a category, the category is included in the Tax Schedule report.

Report Basis (only in **Quicken Business & Personal**)

Select the report basis for only the open or selected report. This setting appears only for applicable business reports. If you have purchased **Quicken Business & Personal**, this setting also applies to the **Business** tab snapshots and the **Tax Planner.** For more information about accrual- and cash-basis accounting, see Choose accrual- or cash-basis accounting.

Note for our Canadian Customers

The following terms will be different in the Canadian releases of Quicken.

Canada: "Cheque" / United States: "Check"
Canada: "Colour" / United States: "Color"
Canada: "Centre" / United States: "Center"
Canada: "Realise" / United States: "Realize"
Canada: "Behaviour" / United States: "Behavior"
Canada: "Analyse" / United States: "Analyze"