

How do I filter reports and graphs?

Quicken provides filters that let you define what must be true about a transaction for it to be included in a report or graph. For example, you can include transactions with only certain payees or categories, or specific securities.

1. [Display](#) the report or graph you want to filter.
2. Click **Customize**.
3. Click the **Advanced** tab to [limit transactions](#) by their amounts or transaction types.
4. Click the **Categories, Payees, Tags, or Securities** tab.
 - **Where is the Tags tab?**
Quicken displays the Tags tab in the Customize dialog only if you've created tags.
5. In the **Payee, Memo, and Category** fields, enter the payee, memo, or category to match.
 - **How do I enter match information?**

Match character	Type of match
= (equal sign)	An exact match (include only transactions that exactly match the text you type)
.. (two periods)	A match that contains unspecified characters where you type .. (at the beginning, in the middle, or at the end of the text you type)
? (question mark)	A match with one unspecified character
~ (tilde)	The report or graph excludes all matches for the text that follows

◦ **Match character is: = (equal sign)**

Example	This report or graph includes	This report or graph doesn't include
=tax	tax, Tax, TAX	taxable, tax deduction, Tax Self:state, surtax, new tax loss, rent, utilities
~tax	taxable, tax deduction, Tax Self:state, surtax, new tax loss, rent, utilities	tax, Tax, TAX

◦ **Match character is: .. (two periods)**

Example	This report or graph includes	This report or graph doesn't include
=..tax	tax, Tax, TAX, surtax, property tax	taxable, tax deduction, Tax Self:state, new tax loss, rent, utilities
tax..	tax, Tax, TAX, taxable, tax deduction, Tax Self:state	surtax, new tax loss, rent, utilities
t..x	trix, tx, tkx, t----x, tax, Tax, TAX	taxable, tax deduction, Tax Self:state, surtax, new tax loss, rent, utilities
..	tax, rent, utilities	transactions that are blank in the specified field (for example, uncategorized transactions)

◦ **Match character is: ? (question mark)**

Example	This report or graph includes	This report or graph doesn't include
==t?x	tkx, tax, Tax, TAX	trix, tx, t----x, taxable, tax deduction, Tax Self:state, surtax, new tax loss, rent, utilities

◦ **Match character is: ~ (tilde)**

Example	This report or graph includes	This report or graph doesn't include
~tax	rent, utilities	tax, Tax, TAX, taxable, tax deduction, Tax Self:state, surtax, new tax loss
~..	transactions that are blank in the specified field (for example, uncategorized transactions)	tax, rent, utilities, and so on

• **What should I keep in mind as I enter match information?**

If you don't know the exact item you want, you can use several special match characters. You can use upper- or lowercase characters (it doesn't matter). Quicken also ignores any spaces before or after the phrase you enter.

For a category or tag or memo match, Quicken also searches through entries in the **Split Transaction** dialog.