Changes to Customization of Certain Reports

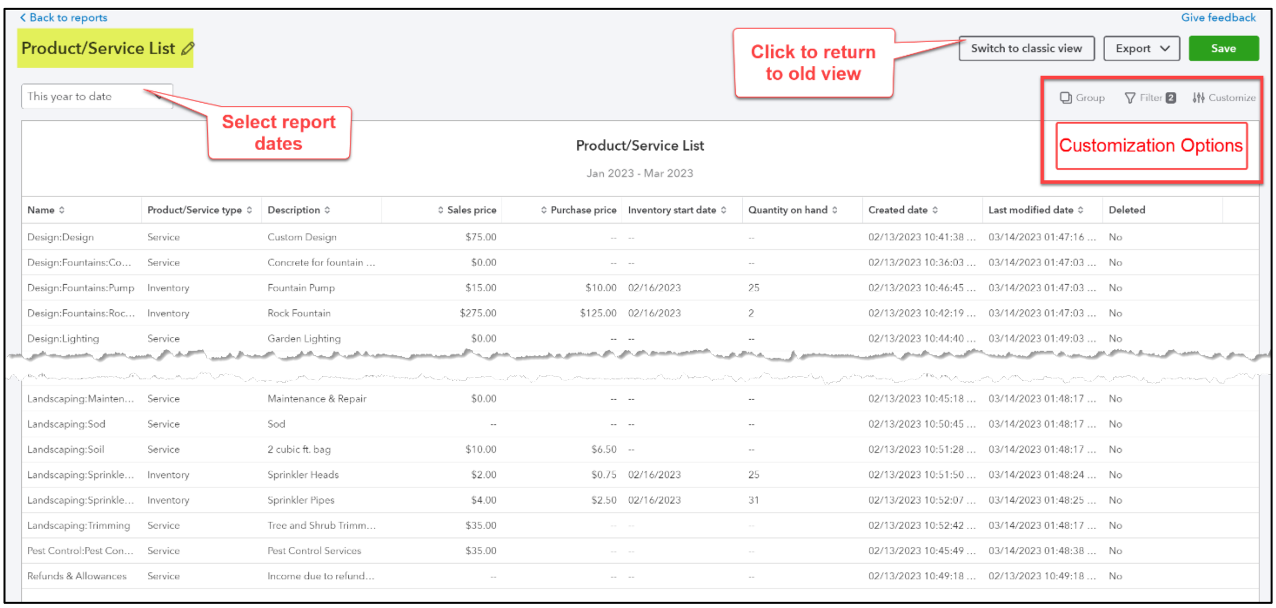
Intuit has made changes to the customization tools on a few of the standard reports. Examples include:

- Product/Service List
- Transaction List By Vendor
- Transaction List By Customer
- Transaction List By Date
- Invoice List

Currently, you can revert to the old format by clicking **Switch to classic view** in the report screen.

Since you will likely be using the **Product/Service List** report most often, we'll use that to review the changes. The tools and features are essentially the same for all reports using the new view.

The new report screen looks something like this:

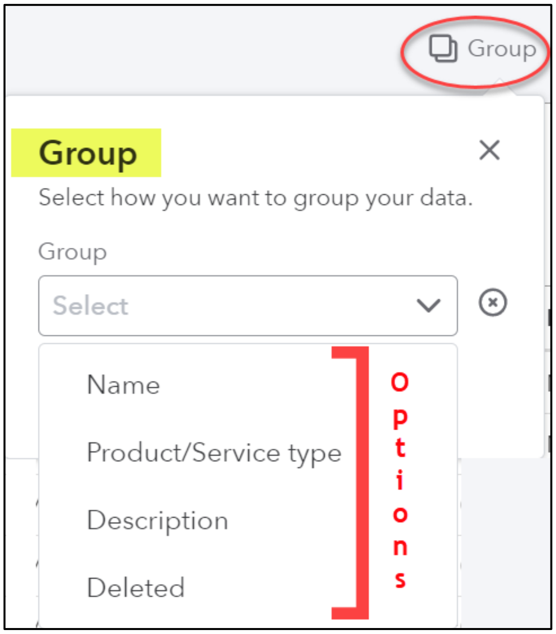


Report dates are changed using the dropdown menu at the top left of the screen.

Other customization options include the following

- **Group**
  - Provides options for grouping items by row
- **Filter**
  - Provides options for restricting the types of items included in the report
- **Customize**
  - Provides options for changing the layout (columns included) of the report

1. Grouping



The options for grouping will depend on the report being customized.

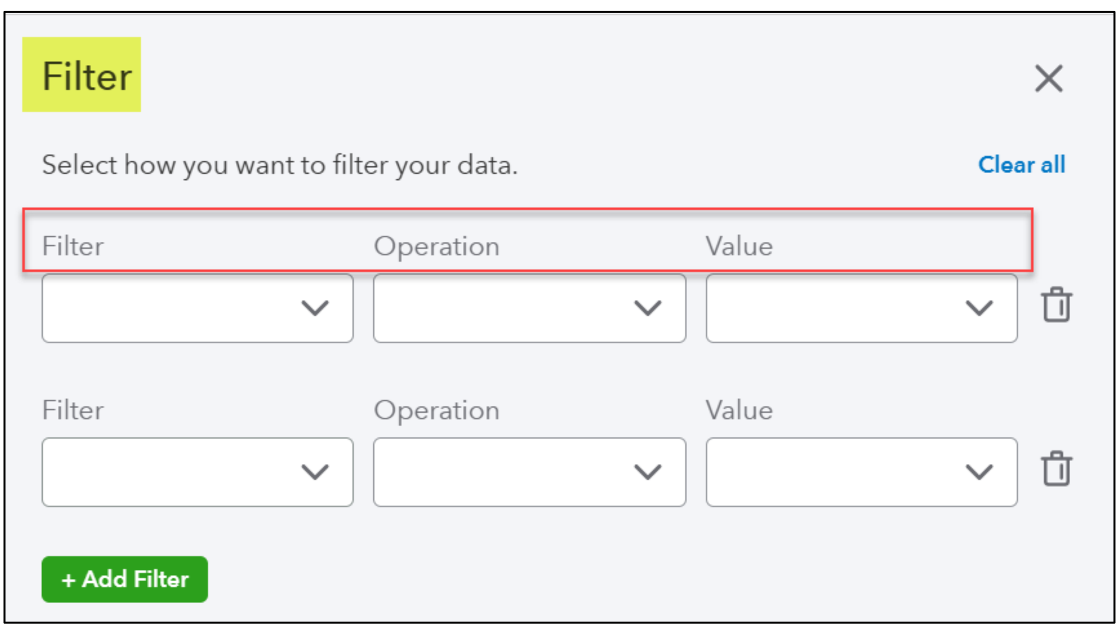
For a list of products and services offered for sale, the most common choice would be **Product/Service type**.

TIP: **Deleted** means inactivated in QBO.

2. Filtering

Filtering allows users to limit the report to display only those items that match one or more criteria.

A panel is displayed when **Filter** is selected in the top right section of the report screen.

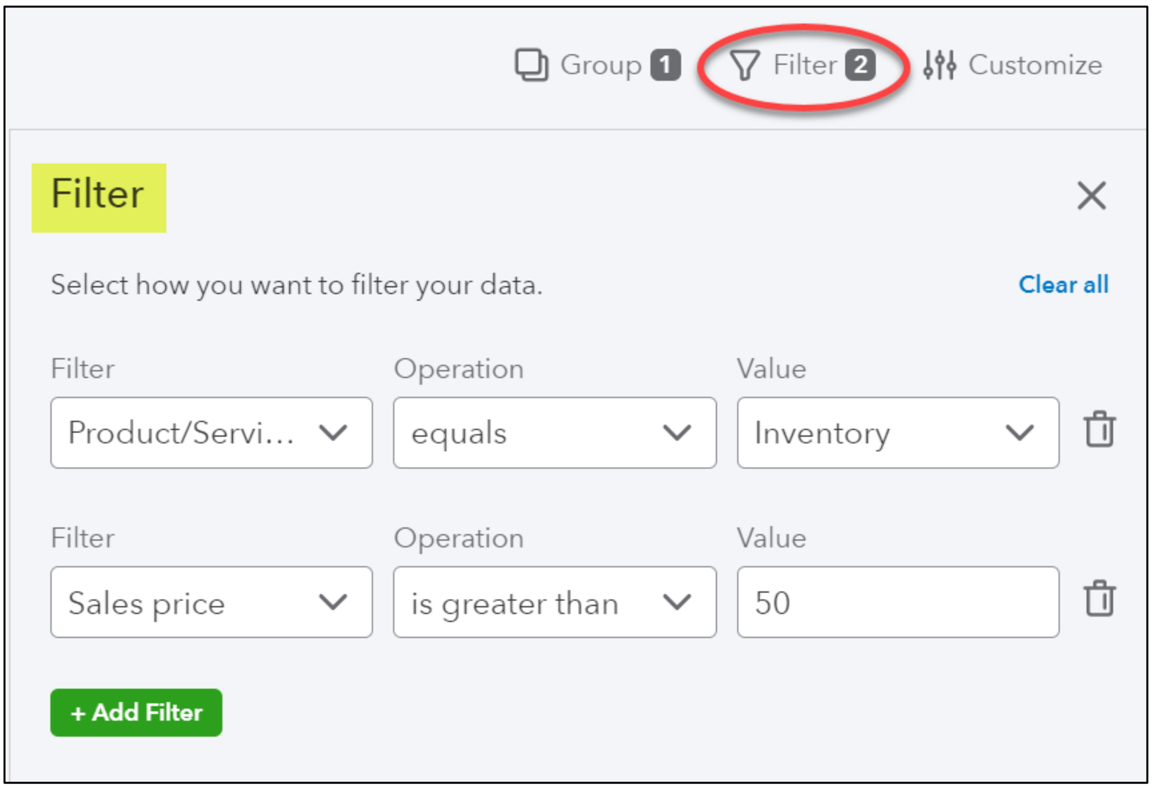


There are three choices made for each **filter**:

- **Filter** – which field should be filtered
- **Operation** – what criteria should be used
  - Operations for text fields would be limited to equals, not equals, is empty, is not empty
  - Operations for numeric fields would include greater than, less than, equals, is empty, etc.
- **Value** – what is the match value(s)
  - For text fields, the match would typically be a dropdown menu
  - For numeric fields, the match would be an amount

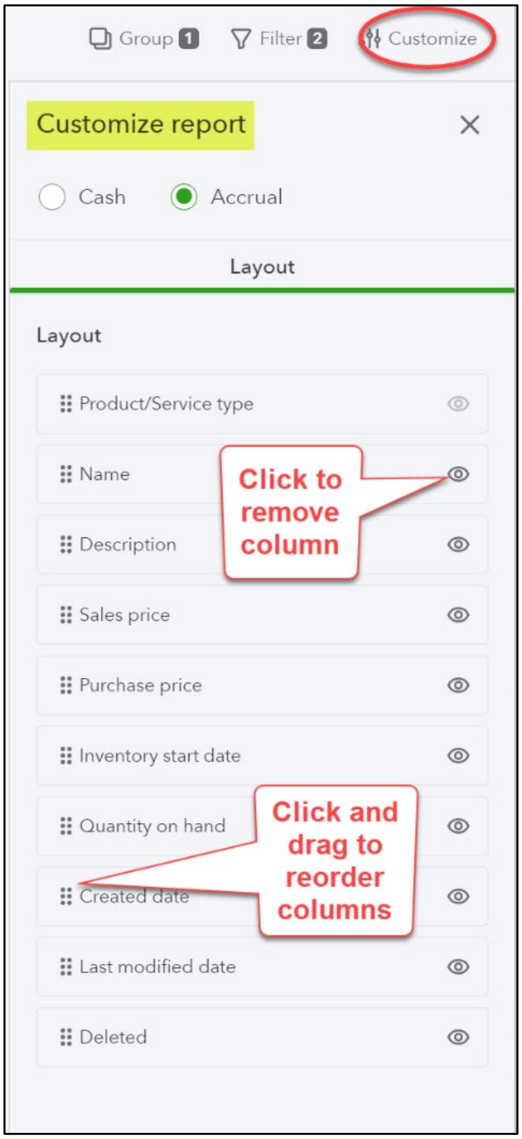
The report itself changes as the various filters are identified.

The filter panel would look like the screenshot below if a **Product/Service List report** was filtered to include only those **inventory** items that sell for more than $50 per unit.



3. Customizing

The fields (columns) to be included in the report are selected by clicking **Customize** in the top right section of the report screen.



To remove a field (column), click the (eye icon). To add a field back, click the . If the icon is greyed out, the field can not be removed. Icons for fields that have been selected for filtering would be greyed out.

To reorder the layout, click and drag the (double vertical ellipsis).

Saved customized reports are found on the **Custom** tab in the Report Center.