

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:

The screenshot displays the 'Product/Service List' report interface. At the top left, there is a 'Back to reports' link and a 'Product/Service List' header with an edit icon. Below the header is a 'This year to date' dropdown menu, annotated with 'Select report dates'. On the top right, there is a 'Give feedback' link, a 'Switch to classic view' button (annotated with 'Click to return to old view'), an 'Export' dropdown, and a 'Save' button. Below these are icons for 'Group', 'Filter', and 'Customize' (annotated with 'Customization Options'). The main table lists various products and services, including 'Design:Design', 'Design:Fountains:Co...', 'Design:Fountains:Pump', 'Design:Fountains:Roc...', 'Design:Lighting', 'Landscaping:Mainten...', 'Landscaping:Sod', 'Landscaping:Soil', 'Landscaping:Sprinkle...', 'Landscaping:Sprinkle...', 'Landscaping:Trimming', 'Pest Control:Pest Com...', and 'Refunds & Allowances'. Each row contains details such as the product name, type, description, prices, inventory start date, quantity on hand, creation and modification dates, and a 'Deleted' status.

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 screenshot shows a 'Group' dialog box with a title bar containing a 'Group' button. The dialog has a close button (X) in the top right. Below the title, it says 'Select how you want to group your data.' There is a 'Group' label above a dropdown menu currently showing 'Select'. To the right of the dropdown is a small 'x' icon. Below the dropdown, a list of options is shown: 'Name', 'Product/Service type', 'Description', and 'Deleted'. A large red bracket on the right side of this list is labeled 'Options' vertically.

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.

The screenshot shows a 'Filter' dialog box with a title bar containing a 'Filter' button and a close button (X). Below the title, it says 'Select how you want to filter your data.' and a 'Clear all' link. The main area contains two rows of filter criteria. Each row has three dropdown menus labeled 'Filter', 'Operation', and 'Value'. The first row is highlighted with a red border. To the right of each row is a trash icon. At the bottom left, there is a green button labeled '+ Add Filter'.

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.

Group 1 Filter 2 Customize

Filter X

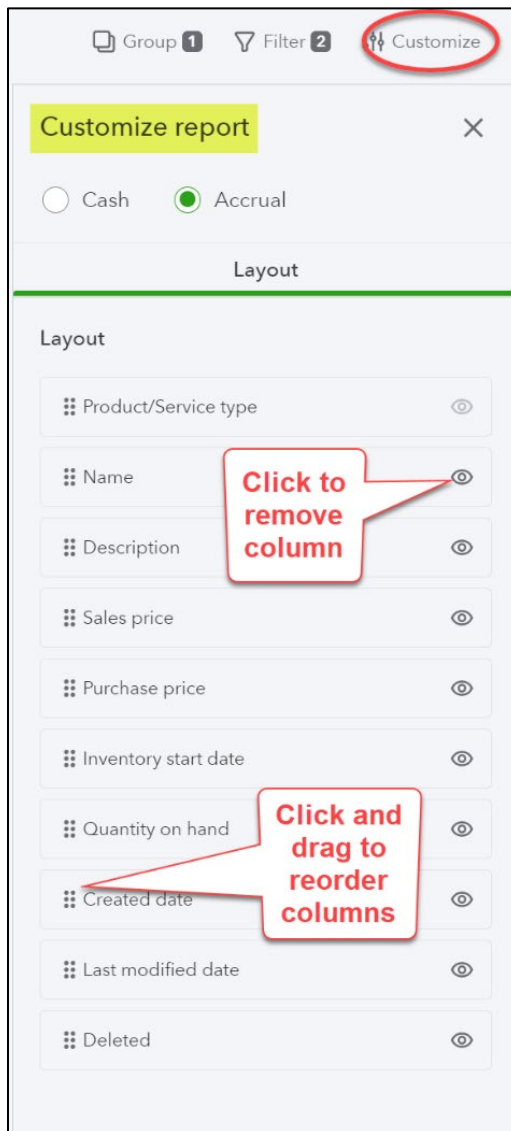
Select how you want to filter your data. [Clear all](#)



Filter	Operation	Value	
Product/Servi... ▼	equals ▼	Inventory ▼	🗑️
Sales price ▼	is greater than ▼	50	🗑️


[+ Add Filter](#)

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.