

Quick Trial Balance Pro - Manage Favorite Reports

Report Favorites

Quick Trial Balance Pro allows you to setup favorite reports that you can quickly access from the Home screen or the Reports menu.

Client File Selected

Company: ABC Custom Wheels, Inc. - 12/31/2014

File: C:\QTBPro_Data\abc.qtb

Last Modified: Friday - December 20, 2013 9:23 AM

Accounts: 43

Book	Book Description	Balance Sheet	Income Statement
1. TX	INCOME TAXES	0.00	0.00
2. BK	FINANCIAL STATEMENTS	0.00	0.00

Quick Access

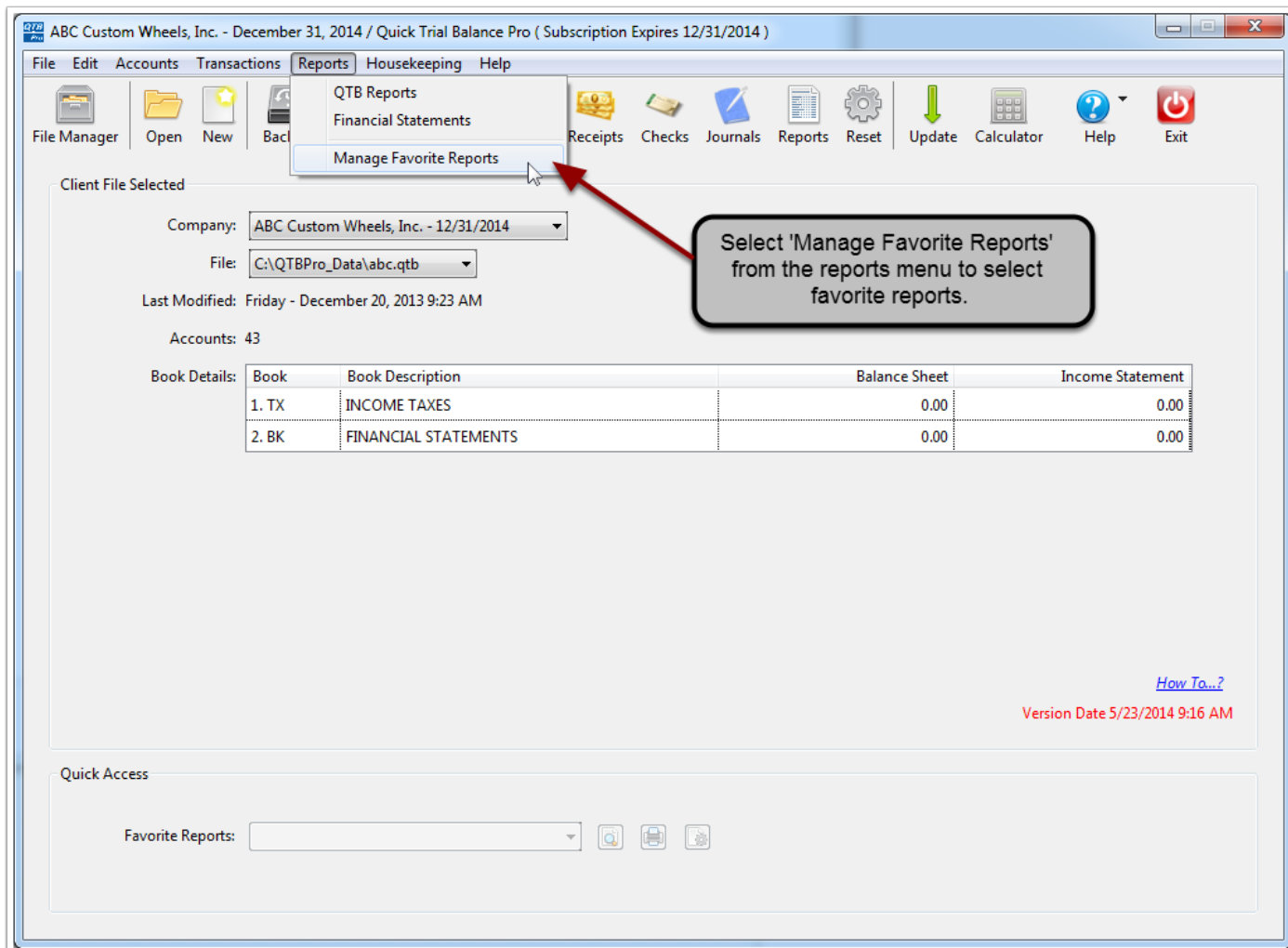
Favorite Reports:

How To...?
on Date 5/23/2014 9:16 AM

Quickly preview, print, and configure favorite reports from the Home Screen

Setup Report Favorites

When you first install Quick Trial Balance Pro, a pre-defined list of favorite reports is setup for you. The list of favorite reports can be changed by selecting Manage Favorite Reports the Reports menu or from the Reports section of the Preferences screen. The Preferences screen is accessible by selecting Preferences from the Edit menu or Preferences from the Quick Trial Balance Pro menu on a Mac.



Review and Select Report Favorites

Currently selected favorites are highlighted in yellow and are checked. Simply use the checkbox to add or remove reports from your list of favorites. By default, all reports are visible in the grid. If you wish to narrow the list to find a report faster, you can use the Report Category selection at the top of the screen. When you have selected all the reports, click the 'Save' button.

Check the reports that you want to be included

Change the report category to narrow the list of reports if you are having a hard time finding a report.

Report Category: All Reports Total number of reports selected: 3

Report Name	Favorite?
Chart of Accounts	<input type="checkbox"/>
Beginning / Prior Year Balances	<input checked="" type="checkbox"/>
Grouped Accounts Listing	<input type="checkbox"/>
Primary / Secondary	<input type="checkbox"/>
Journals Listing	<input type="checkbox"/>
Account Document	<input type="checkbox"/>
Working Trial Balance	<input checked="" type="checkbox"/>
Lead Schedules	<input type="checkbox"/>
Journal Entries Listing	<input type="checkbox"/>
Adjusted Trial Balance	<input checked="" type="checkbox"/>
Grouped Trial Balance	<input type="checkbox"/>
Grouped Accounts Detail Report	<input type="checkbox"/>
Comparative Grouped Trial Balance	<input type="checkbox"/>
Trial Balance Comparison	<input type="checkbox"/>
Proforma Financial Statement	<input type="checkbox"/>
Cash Disbursements Listing	<input type="checkbox"/>
Cash Receipts Listing	<input type="checkbox"/>
General Ledger	<input type="checkbox"/>
Account Comparison Report	<input type="checkbox"/>
Expense A/C Analysis Report	<input type="checkbox"/>

Check the checkbox next to any reports you wish to setup as a favorite.

Clear All To quickly remove all favorite reports, you can click the Clear All button. Save Cancel

Preview, Print, or Configure Favorite Report

Once a report is setup as a favorite, you can select it from the Favorite Report drop-down on the Home screen or the Reports menu. Using the buttons to the right you can quickly preview, print, or configure the report. The preview and print will automatically use the settings saved for the report, if any. If no saved settings were found, it will print using Quick Trial Balance Pro defaults. These settings can be viewed and changed using the configure button.

