# **Quick Trial Balance Pro - Printing Report Batches**

#### **Start the Reports Screen**

Quick Trial Balance Pro allows you to select from a list of reports and print them all at once instead of having to select each report individually and then printing it. Collectively, the selected reports are called a batch. To print a batch of reports, first, select QTB Reports from the Reports menu or click the Reports icon on the Home screen.

ABC Custom Wheels, Inc D	ecember 31,	2014 / Quick Trial Balance Pro ( Subscri	iption Expires 12/3	1/2014)			
File Edit Accounts Transa	ctions Repo	rts Housekeeping Help					
File Manager Open New	Bacl	QTB Reports Financial Statements Manage Favorite Reports	Checks J	ournals Reports Rese	·   🕂	Calculator	Help Exit
Client File Selected Company:	ABC	Beginning / Prior Year Balances Working Trial Balance Adjusted Trial Balance	The rer	oort screen is acc	essed via	the repo	rts
File: Last Modified:		mber 20, 2013 9:23 AM		u or the Reports			
Accounts:	43						
Book Details:	Book	Book Description		Bal	ance Sheet	I	ncome Statement
	1. TX	INCOME TAXES			0.00		0.00
	2. BK	FINANCIAL STATEMENTS			0.00		0.00
						Versio	<u>How To?</u> n Date 5/23/2014 9:16 AM
Quick Access Favorite Reports:	Beginning /	Prior Year Balances 🔹 🔻					

# **Create a Temporary Batch**

Once the report screen is shown, you will automatically be in a temporary batch as indicted on the screen next to the batch drop-down. In a temporary batch, you can select as many reports as you wish by checking the box to the left of the report name. All reports are categorized by type, so if you cannot see a report, it may be hidden under a closed folder. To expand a folder, click the + to the left of the folder. Conversely, the - button will close the folder. The number of reports selected in each report category is indicated next to the folder name. Once you select all of your reports, you can choose to print, preview, print to file, or save them to a saved batch that you can recall later.

ABC Custom Wheels, Inc December 31, 2014 - Reports	
Batch Temporary Selection	Chec repo clickt By default, you are in a temporary batch.
General Reports (2 Reports Selected)	
Beginning / Prior Year Balances	
V Compad Accounts Listing	
	orts, check the box next to
	red reports. ort highlighted on the left.
Account Documents Listing	Configure Settings Reset to Default
Trial Balances	Configure Settings
E	
The second secon	
	Prior Year Reports
	This option allows you to print a report from a prior year without having to perform an UnReset to
	the Prior Year.
Click the + button to expand report category folder.	a Select the year that you wish to print reports for Current Year
	To switch back to the current year, select 'Current Year' above. This setting is only active on this report screen and will not affect the rest of the program. If you leave the reports screen, it will default back to the current year the next time you return.
	How To?
Expand All Clear All 2 Reports Selected	Show dialog when printing PDF  Preview Print Cancel

## **Save Report Batch**

Once a group of reports are selected in the temporary batch, you can save them to a saved batch by clicking the edit button next to the Batch drop-down.

ABC Custom Wheels, Inc December 31, 2014 - Reports	
Batch Temporary Selection	Click the edit button to save the batch.
Beginning / Prior Year Balances     Grouped Accounts Listing     Primary / Secondary Groups Listing     Journals Listing     Account Documents Listing     Trial Balances     Financial Statements     Transaction Reports     Analysis Reports	Grouped Accounts Listing Settings Report specific settings pertain to the report highlighted on the left. Configure Settings Reset to Default
	Prior Year Reports This option allows you to print a report from a prior year without having to perform an UnReset to the Prior Year. Select the year that you wish to print reports for Current Year
	To switch back to the current year, select 'Current Year' above. This setting is only active on this report screen and will not affect the rest of the program. If you leave the reports screen, it will default back to the current year the next time you return.
Expand All Clear All 2 Reports Selected	How To?

### **Saved Batches Screen**

After you click the edit button to save the batch, the "Saved Batches" screen appears. This screen indicates how many batches are currently selected and prompts you to enter a description for the new batch. Once you have entered the description, click the 'Save' button and the new batch is saved.

ABC Custom Wheels, Inc December 31, 2014 - Savec	Batches
Saved Batch Description	My First Batch Saved Batch Description 2 reports are selected My First Batch Enter a batch description to help identify the group of reports later.
The number of reports currently selected the batch are shown here.	ected in
+ - *-	Save Cancel

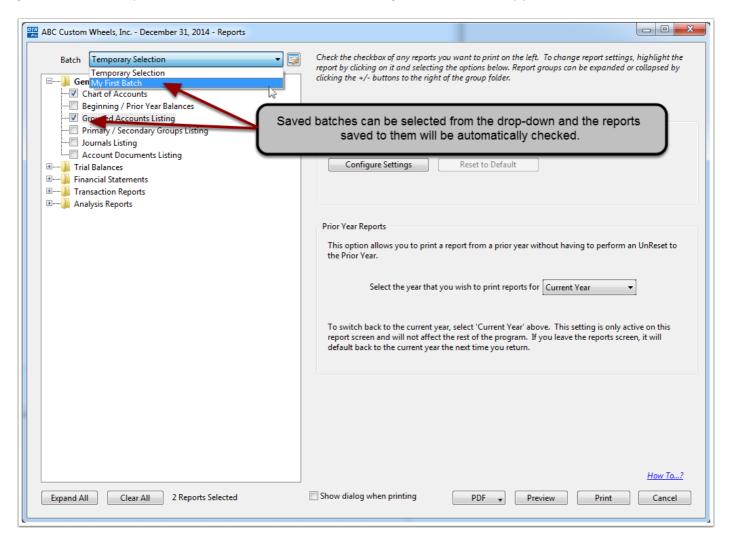
# Add, Remove, Edit Saved Batches

The new saved batch is displayed in the grid on the left side of the screen. Using the buttons under the grid, you can add another batch name for the selected reports, remove the saved batch, or edit the saved batch to change the description. If you are finished reviewing the saved batch, click the 'Select' button to exit the screen.

ABC Custom Wheels, Inc December 31, 2014 - Saved Batches			
Saved Batch Description My First Batch	My First Batch Saved Batch Description		
	2 reports are selected		
You can add another batch, remove the selected batch, or edit the selected batch with the +, -, and cog wheel buttons respectively.			
+ - *-	Select	Cancel	

# **Recall a Saved Batch**

When you return to the the Reports screen, you will still be in the temporary batch but now when you click the drop-down list, for the batch selections, your new batch appears for selection.



# Update the Reports Selected in a Batch

If you have a saved batch selected, you can change the reports saved to batch by checking or unchecking reports and clicking the edit button next to the batch selection. You will then be prompted to saved the currently selected reports to the batch. Click 'Yes' to save.

ABC Custom Wheels, Inc December 31, 2014 - Reports	
Batch My First Batch   General Reports (3 Reports Selected)  General Reports (3 Reports Selected)  General Reports (3 Reports Selected)  General Reports Var Balances  General Reports Listing  Account Documents Listing  Account Documents Listing  Financial Statements  General Statements	Check the checkbox of any reports you want to print on the left. To change report settings, highlight the report by clicking on it and selecting the options below. Report groups can be expanded or collapsed by clicking the +/- buttons to the right of the group folder.  Beginning / Prior Year Balances Settings Report specific settings pertain to the report highlighted on the left. Configure Settings Reset to Default You are now in batch mode, any saved settings will be saved to the selected batch. al Balance Pro rently Selected Reports to Batch in to update 'My First Batch' with the currently selected
Expand All Clear All 3 Reports Selected	Yes       No         To switch back to the current year, select 'Current Year' above. This setting is only active on this report screen and will not affect the rest of the program. If you leave the reports screen, it will default back to the current year the next time you return.         Image: the state of the program of the program of the program of the program.         Image: the state of the program of the program.         Image: the state of the program.         Image: the program.         Image: the

# **Updated Batch**

The Saved Batches screen will now indicate the new amount of reports selected. Click 'Save' to finalize the change.

