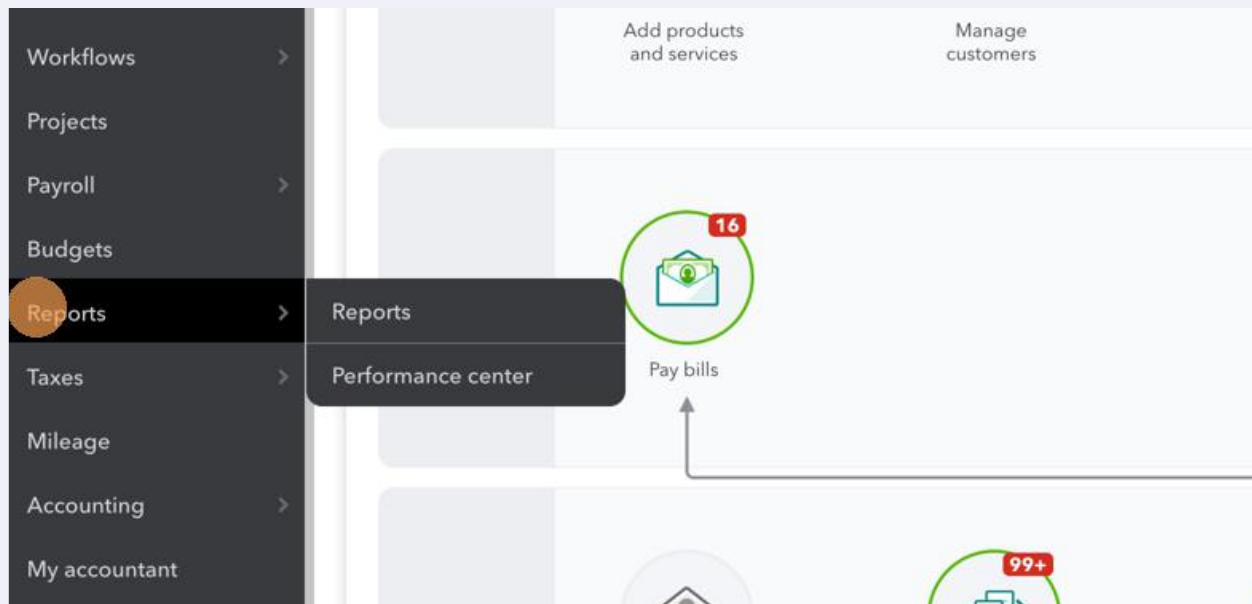


QuickBooks Online: Create P&L; by Month for LAST YEAR

1 Login to your QBO Account using the regular link: <https://qbo.intuit.com/>

2 Click "Reports" on the left navigation bar



3 If you are not already in the Standard Tab, then click "Standard"

Reports Performance center

Reports

Standard Custom reports Management reports Multi-Co

NAME	CREATEI
Invoice Report CUSTOM	Andrea
Invoices by Customers missing a LOCATION CUSTOM	Andree

4 Start with a "Profit and Loss" under "Favorites"

Workflows Projects Payroll Budgets **Reports** Taxes Mileage Accounting My accountant

Favorites

- Balance Sheet Summary
- Profit and Loss Detail
- Profit and Loss ?**

Business overview

- Audit Log
- Balance Sheet Comparison

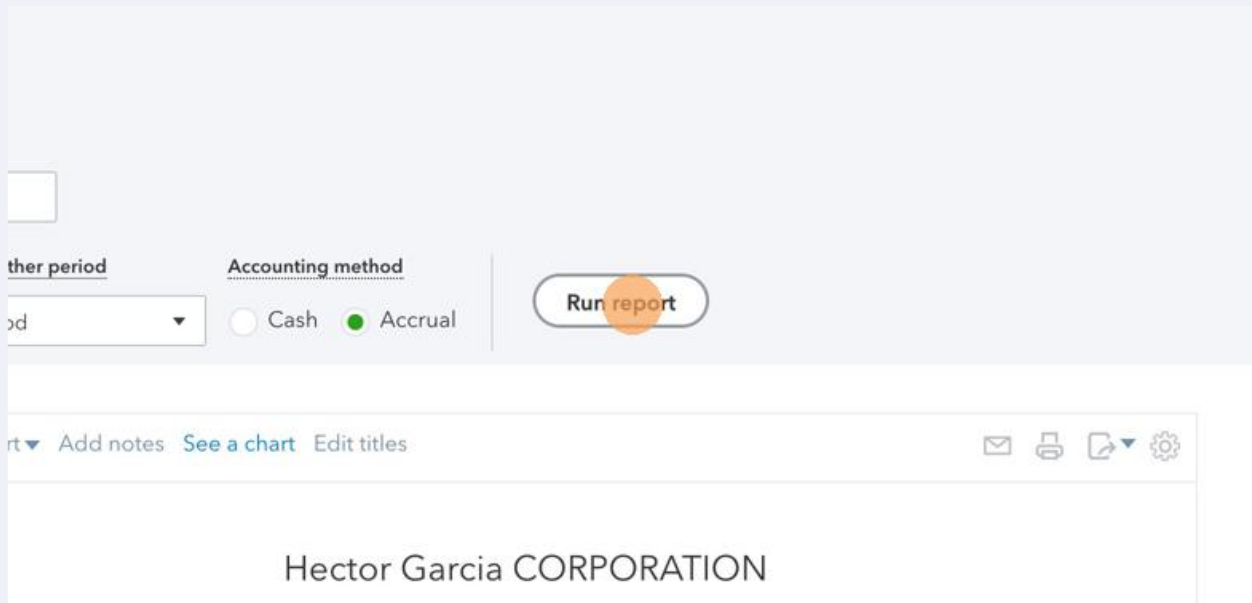
5 Change the Report Period to: "Last Year"

The screenshot shows a sidebar menu on the left with the following items: Sales, Cash flow, Expenses, Workflows, Projects, Payroll, Budgets, Reports (highlighted), and Taxes. The main content area features a dropdown menu for 'This Year-to-date' with the following options: This Year-to-date, This Year-to-last-month, Yesterday, Recent, Last Week, Last Week-to-date, Last Month, Last Month-to-date, Last Quarter, Last Quarter-to-date, Last Year (highlighted with an orange circle), and Last Year-to-date. To the right, there are date input fields showing '01/01/2022' to '03/02/2022', a 'Show non-zero or active only' section with an 'Active rows/active columns' dropdown, and a 'Compare another period' section with a 'Select period' button. Below these are 'Collapse', 'Sort', and 'Add' buttons.

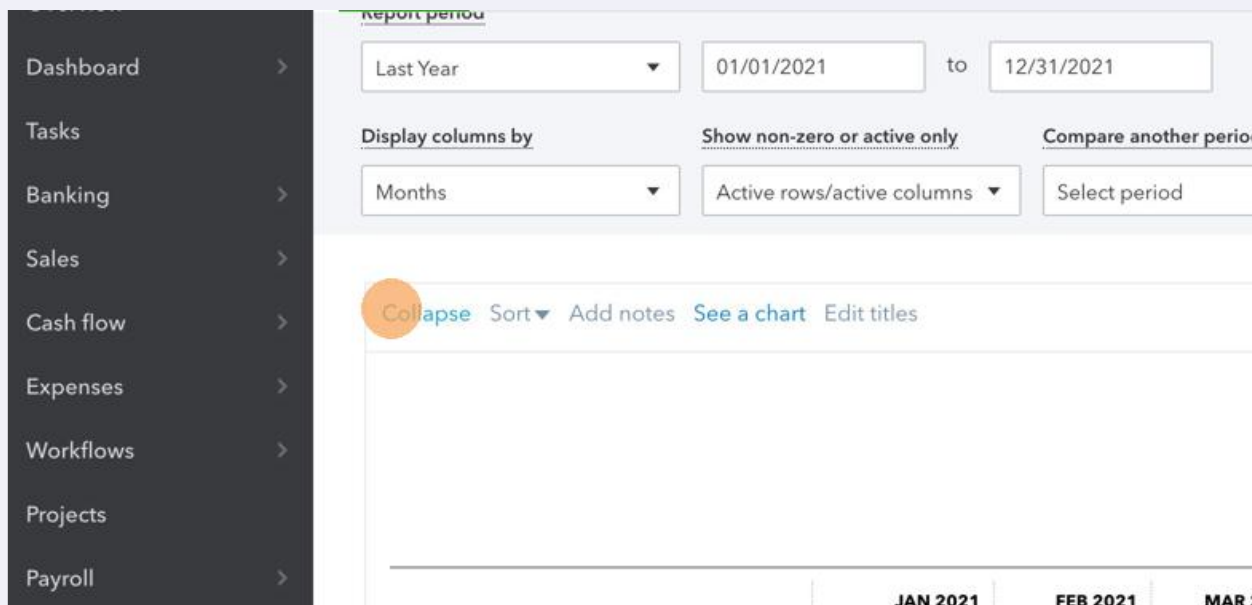
6 Under "Display Columns by", Change it from "Total Only" to "Months"

The screenshot shows the same sidebar menu as in the previous image. The main content area features a dropdown menu for 'Display columns by' with the following options: Total Only (highlighted with a green box), Days, Weeks, Months (highlighted with an orange circle), Quarters, Years, Customers, Vendors, Employees, and Locations. To the right, there are date input fields showing '01/01/2022' to '03/02/2022', a 'Show non-zero or active only' section with an 'Active rows/active columns' dropdown, and a 'Compare another period' section with a 'Select period' button. Below these are 'Collapse', 'Sort', and 'Add' buttons. At the bottom right, there are expandable sections for 'Income' and 'INCOME PARENT'.

7 Click "Run report" to refresh report



8 Click "Collapse" to hide subaccounts



9 Click here on "Sort"

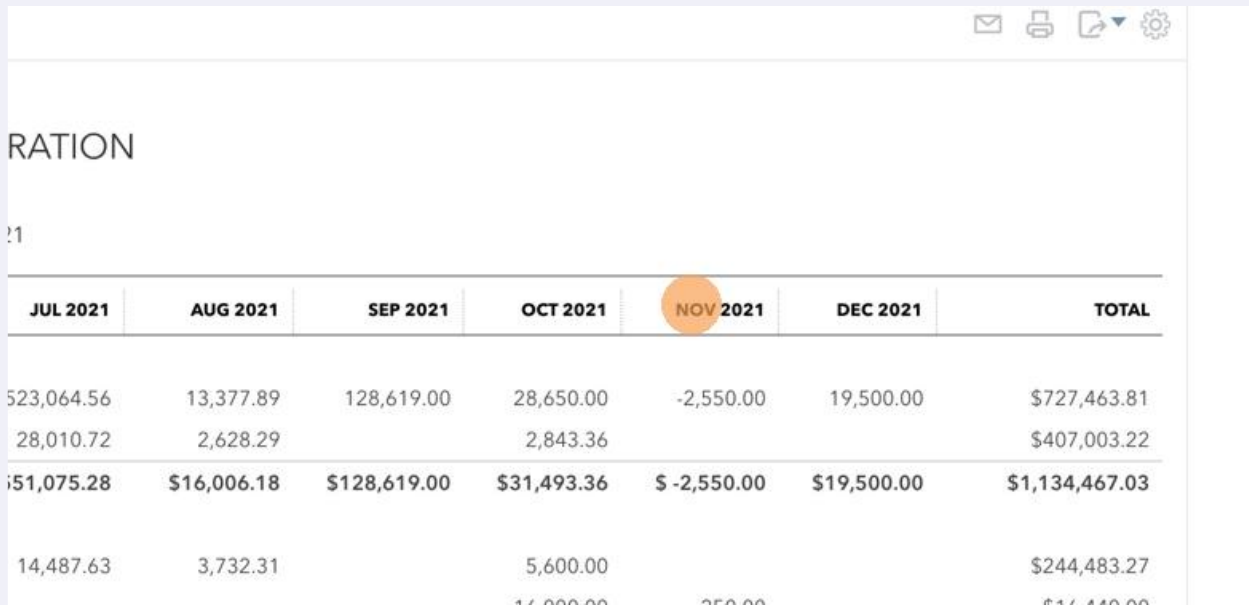
The screenshot shows a report interface with a dark sidebar on the left containing menu items: Banking, Sales, Cash flow, Expenses, Workflows, Projects, Payroll, Budgets, Reports, Taxes, Mileage, and Accounting. The 'Reports' item is highlighted. The main content area has a 'Report period' section with a dropdown set to 'Last Year' and date fields for '01/01/2021' and '12/31/2021'. Below this is a 'Display columns by' section with a dropdown set to 'Months', and a 'Show non-zero or active only' section with a dropdown set to 'Active rows/active columns'. A 'Compare another period' section with a 'Select period' button is also visible. The main report area has a toolbar with 'Expand', 'Sort', 'Add notes', 'See a chart', and 'Edit titles'. The 'Sort' dropdown is highlighted with an orange circle. Below the toolbar, a table header shows columns for 'JAN 2021', 'FEB 2021', and 'MAR 2021'.

10 Change default sorting to "Total in descending order"

The screenshot shows the same report interface as above, but with the 'Sort' dropdown menu open. The menu has three options: 'Default' (selected with a green dot), 'Total in ascending order' (with a white dot), and 'Total in descending order' (with an orange dot). The table below shows data for 'Income' with columns for 'JAN 2021', 'FEB 2021', and 'MAR 2021'. The data rows are 'INCOME PARENT 1' and 'INCOME PARENT 2'.

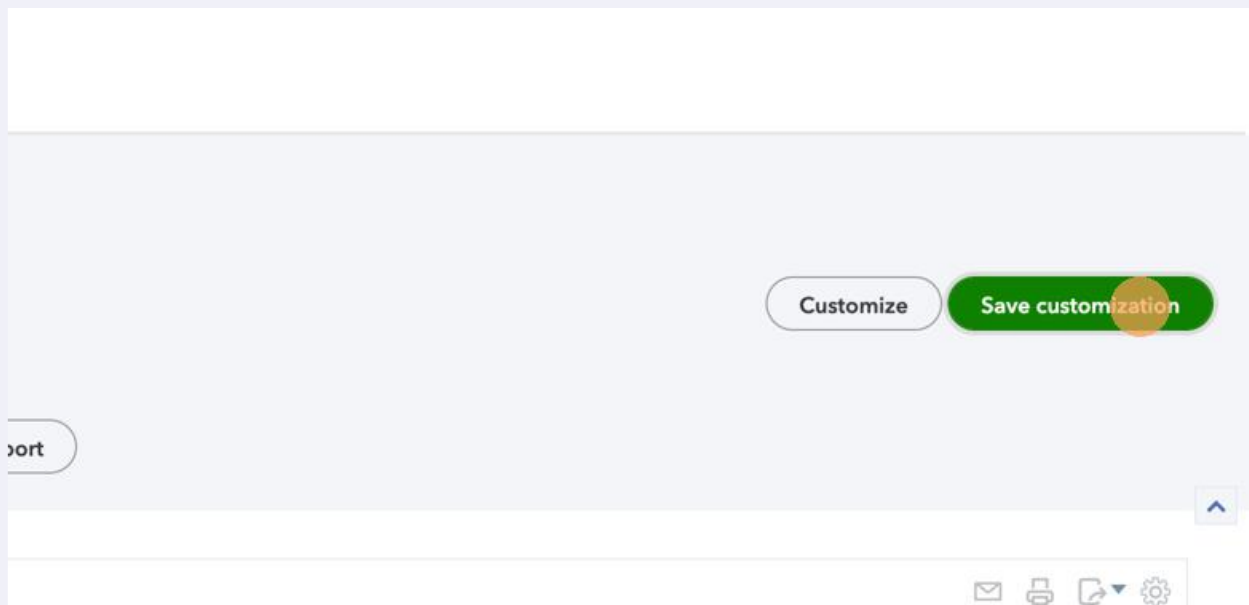
	JAN 2021	FEB 2021	MAR 2021
Income			
INCOME PARENT 1	2,850.00	3,055.97	1,544.99
INCOME PARENT 2	141,779.25	59,927.58	49,415.23

11 Now you can see the P&L; broken down by month!



	JUL 2021	AUG 2021	SEP 2021	OCT 2021	NOV 2021	DEC 2021	TOTAL
	523,064.56	13,377.89	128,619.00	28,650.00	-2,550.00	19,500.00	\$727,463.81
	28,010.72	2,628.29		2,843.36			\$407,003.22
	\$51,075.28	\$16,006.18	\$128,619.00	\$31,493.36	\$ -2,550.00	\$19,500.00	\$1,134,467.03
	14,487.63	3,732.31		5,600.00			\$244,483.27
				11,000.00	250.00		\$11,250.00

12 To be able to run this report quickly in the future, Click "Save customization"



Customize Save customization

Sort

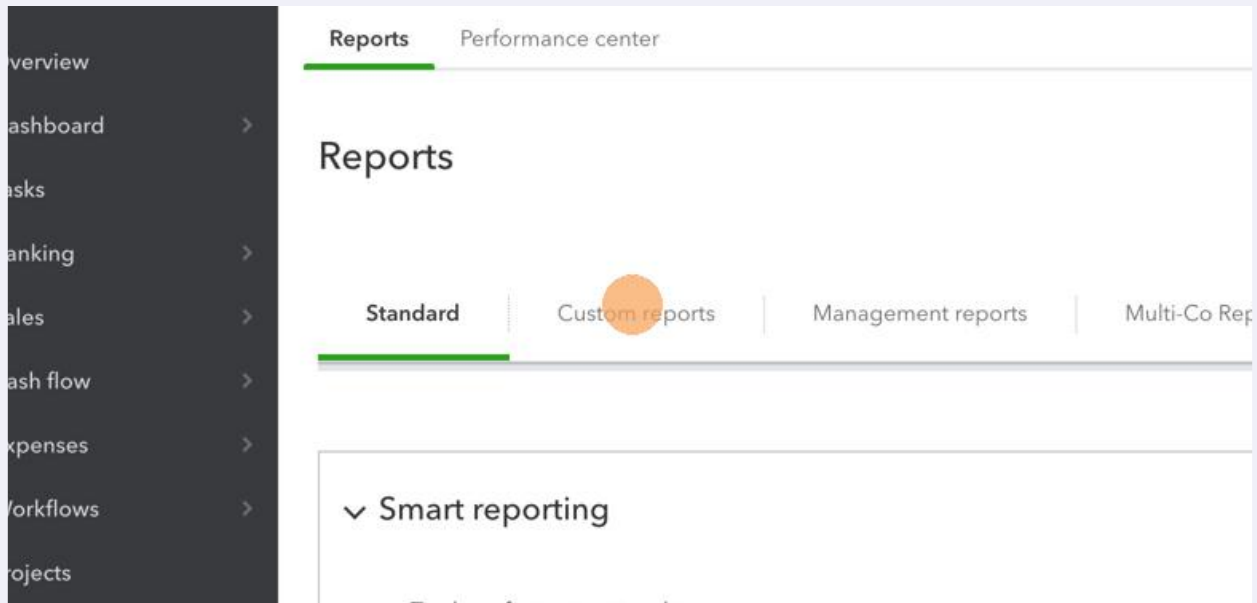
Report

13 Name the Report " by Month (Last Year)"
Click "Save"

14 To recall a SAVED REPORT, Click "Reports"

INCOME PARENT 1	2,850.00	3,055.97	1,544.99
INCOME PARENT 2	141,779.25	59,927.58	49,415.23
Total Income	\$144,629.25	\$62,983.55	\$50,960.22
▼ Cost of Goods Sold			
Cost of goods sold	215,383.42		
Freight Cost			
Cost of Goods Sold	\$215,383.42	\$0.00	\$0.00
	\$ -70,754.17	\$62,983.55	\$50,960.22
▼ Expenses			
Payroll expenses	37,912.91	25,989.24	25,309.88
Taxes paid	85,843.78	6,744.86	6,856.92
SELLING EXPENSES	17,850.00		
Employee benefits	5,055.13	9,970.26	

15 Click "Custom reports"



16 Find the Report you want to see, and click on the title

