

How to Add Units Description column

The **Units Description** column is used to show the Units setup for the Account or Primary Account. This is a useful information on reports with Account or Primary Account row setup. This tells you the Units setup for the Account of Primary Account

Follow these steps on how to create Units Description column type.

1. A new row will be available in the grid section.
2. In the **Column Type** field, select Units Description.
3. In the **Column Name** field, enter the name you would like to call the column. The value entered in this field may show on your financial report, granted the Caption field for that column is set to Column Name. This is discussed more on [How to Add Column Name Row](#).
4. In the **Caption** field, select the type of caption you want for the column. This is discussed more on [How to Add Column Name Row](#).
5. In the **Width** field, set it to your desired column width. By default it is set to 160 pixels, which is approximately 1 1/4 inches.
6. In the **Alignment** field, set how the value for the column be displayed.
 - Select **Center** if you want it Centered
 - Select **Left** if you want it Left Aligned
 - Select **Right** if you want it Right aligned
7. There is an ability to show or hide the column. Check the Hidden checkbox if you decide to hide the column. This is discussed more on [How Hidden checkbox works when enabled](#).
8. All other fields are not anymore necessary so you can leave those out.

This is how Units Description column will look like when you follow the above steps.

The screenshot shows the 'Column Designer - Trial Balance Detail - September 04, 2018 16:24:48' window. The 'Details' tab is active. The 'Column Name' is 'Trial Balance Detail - September 04, 2018', the 'Description' is 'Trial Balance Detail Template', the 'Column Type' is 'User Defined', and the 'Run Date' is '09/04/2018'. Below the configuration fields is a table of existing columns. A new row, C9, is highlighted in yellow, showing 'Units Description' as the Column Name, 'Units Description' as the Caption, and 'Column Name' as the Alignment.

ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Co
C1	Row Name	Row Id	Column Name							
C2	Row Id	Row Id	Column Name							
C3	Beginning Balance	Beginning Balance	Filter Type	BOT	-1	01/01/1900	08/31/2018			
C4	GL Amounts	GL Amounts	Filter Type	BOY	0	01/01/2018	09/30/2018			
C5	Debit	Total Debit	Column Name	0	0	09/01/2018	09/30/2018			
C6	Credit	Total Credit	Column Name	0	0	09/01/2018	09/30/2018			
C7	Budget	Budget	Column Name	0	0	09/01/2018	09/30/2018			2018 budg
C8	Units	Total Units	Column Name	0	0	09/01/2018	09/30/2018			
C9	Units Description	Units Description	Column Name							

Here's how it is shown when report is previewed/printed. Highlighted is the **Units Description** column type.

Balance Sheet - June 20, 2019 10:2:58
As Of 6/20/2019

Thursday, June 20, 2019
4:52 PM

Row Id	Asset	Current Year	Current Units	Prior Year	Prior Units	Units Description	Ending Balance	Percentage
R3	Asset	36,833,747	28,888,484	36,784,008	28,888,448		36,833,747.09	0.00%
R5	Cash Accounts	-78,974,657	-29,108,321	-78,450,665	-29,108,477		(78,974,656.76)	0.00%
R7	Receivables	25,093,755	3,707,917	24,712,221	3,692,217		25,093,755.02	0.00%
R8	Prepays	1,790,236	1,327,749	1,790,236	1,327,749		1,790,236.00	0.00%
R9	Inventories	864,493,974	70,980,725	849,891,802	68,275,685		864,493,970.64	0.00%
R12	Other Assets	-1,455,918	-7,327,749	-1,455,736	-7,089,174		(1,455,917.81)	0.00%
R15	Total Assets :	847,781,134	68,478,805	833,271,666	65,986,448		847,781,134.18	0.00%
R19	Liability	282,395	8	271,752	8		282,394.87	0.00%
R21	Payables	36,747,641	3,854,997	11,622,728	-415,326		36,747,640.72	0.00%
R22	Other Payables	725,381,380	50,003,465	736,208,713	51,305,885		725,381,380.15	0.00%
R23	Sales Tax Payables	861,334	0	861,184	0		861,333.97	0.00%
R24	Payroll Tax Liabilities	516	0	496	0		516.21	0.00%
R26	Pending Payables	460,001	188,163	415,437	151,163		460,001.20	0.00%
R28	Payroll Taxes Current	199,696	0	197,077	0		199,695.72	0.00%
R29	Payroll Deductions	41,324	0	40,930	0		41,323.79	0.00%
R30	Employer Liability	75,087	-4	73,898	-4		75,087.37	0.00%
R32	Total Liabilities :	764,049,374	54,046,629	749,692,207	51,041,826		764,049,374.00	0.00%

The **Units Description** column is used to show the Units setup for the Account or Primary Account. This is a useful information on reports with Account or Primary Account row setup. This tells you the Units setup for the Account of Primary Account

Follow these steps on how to create Units Description column type.

1. A new row will be available in the grid section.
2. In the **Column Type** field, select Units Description.
3. In the **Column Name** field, enter the name you would like to call the column. The value entered in this field may show on your financial report, granted the Caption field for that column is set to Column Name. This is discussed more on [How to Add Column Name Row](#).
4. In the **Caption** field, select the type of caption you want for the column. This is discussed more on [How to Add Column Name Row](#).
5. In the **Width** field, set it to your desired column width. By default it is set to 160 pixels, which is approximately 1 1/4 inches.
6. In the **Alignment** field, set how the value for the column be displayed.
 - Select **Center** if you want it Centered
 - Select **Left** if you want it Left Aligned
 - Select **Right** if you want it Right aligned

- There is an ability to show or hide the column. Check the Hidden checkbox if you decide to hide the column. This is discussed more on [How Hidden checkbox works when enabled](#).
- All other fields are not anymore necessary so you can leave those out.

This is how Units Description column will look like when you follow the above steps.

Column Designer - Trial Balance Detail - September 04, 2018 16:24:48

New Save Search Delete Undo Duplicate Import Export Close

Details Audit Log

Column Name: Trial Balance Detail - September 04, 2018 Description: Trial Balance Detail Template Column Type: User Defined Run Date: 09/04/2018

+ Insert X Remove Export View Filter (F3)

ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Co
C1	Row Name		Column Name						Add Record	
C2	Row Id	Row Id	Column Name						Add Record	
C3	Beginning Balance	Beginning Balance	Filter Type	BOT	-1	01/01/1900	08/31/2018		Add Record	
C4	GL Amounts	GL Amounts	Filter Type	BOY	0	01/01/2018	09/30/2018		Add Record	
C5	Debit	Total Debit	Column Name	0	0	09/01/2018	09/30/2018		Add Record	
C6	Credit	Total Credit	Column Name	0	0	09/01/2018	09/30/2018		Add Record	
C7	Budget	Budget	Column Name	0	0	09/01/2018	09/30/2018		Add Record	2018 budg
C8	Units	Total Units	Column Name	0	0	09/01/2018	09/30/2018		Add Record	
C9	Units Description	Units Description	Column Name						Add Record	

Here's how it is shown when report is previewed/printed. Highlighted is the **Units Description** column type.

Trial Balance Detail - September 04, 2018 16:24:48
As Of 9/4/2018

Thursday, September 6, 2018 10:55 AM

Row Id	01/01/1900 - 08/31/2018	01/01/2018 - 09/30/2018	Total Debit	Total Credit	Budget	Total Units	Units Description
40000-0000-001 - Sales - Home office - Grains	R2	5.00	5.00	0.00	0.00	0.00	
40000-0001-001 - Sales - Fort Wayne - Grains	R2	2,613.00	2,613.00	0.00	0.00	0.00	
40000-0001-004 - Sales - Fort Wayne - Gas	R2	11,648.62	11,648.62	0.00	0.00	0.00	0.00 Gallons
40000-0001-007 - Sales - Fort Wayne - Diesel	R2	6,933.89	6,933.89	0.00	0.00	0.00	0.00 Gallons
40000-0001-014 - Sales - Fort Wayne - Propane	R2	14,595.69	14,595.69	0.00	0.00	0.00	0.00 Gallons
40000-0001-106 - Sales - Fort Wayne - Snacks	R2	43.50	39.00	33.00	27.50	0.00	(1.00)
40010-0001-001 - Sales - Taxable - Fort Wayne - Grains	R2	64,557.21	64,557.21	0.00	0.00	0.00	0.00
40010-0001-006 - Sales - Taxable - Fort Wayne - Gas	R2	164,367.97	164,367.97	0.00	0.00	0.00	0.00
40010-0001-007 - Sales - Taxable - Fort Wayne - Diesel	R2	273,416.82	273,416.82	0.00	0.00	0.00	0.00
40010-0002-001 - Sales - Taxable - Indianapolis - Grains	R2	4,200.00	4,200.00	0.00	0.00	0.00	0.00
40015-0101-000 - Sales - Non-Tax - (Rely Mart - Admin	R2	62.11	62.11	0.00	0.00	0.00	0.00
40500-9002-103 - Storage Income-Austin Tech Hub-Tobacco	R2	0.00	0.00	0.00	0.00	666.00	0.00
41000-0000-000 - Freight Income - Home office - Admin	R2	(12,500.00)	(12,500.00)	0.00	0.00	0.00	0.00
41000-0001-000 - Freight Income - Fort Wayne - Admin	R2	251.07	251.07	0.00	0.00	0.00	0.00
42001-0001-001 - Software Sales-Fort Wayne-Grains	R2	2,500.00	2,500.00	0.00	0.00	0.00	0.00
45000-0001-101 - Discount Take - Fort Wayne - Pop	R2	(1.85)	(1.85)	0.00	0.00	0.00	0.00
45000-0005-100 - Discount Take-Chatham-General Merchandise	R2	9.12	9.12	0.00	0.00	0.00	0.00
47000-0001-005 - Sales Advance - Fort Wayne-Feed	R2	(100.00)	(100.00)	0.00	0.00	0.00	0.00
47000-0001-001 - Sales Advance - Remede Scale 2-Grains	R2	850.00	850.00	0.00	0.00	0.00	0.00
49000-0000-000 - Other Income - Home office - Admin	R2	100.00	100.00	0.00	0.00	0.00	0.00
49000-0001-000 - Other Income - Fort Wayne - Admin	R2	3,794.75	3,794.75	0.00	0.00	0.00	0.00
49100-0001-000 - Tank Rent - Fort Wayne - Admin	R2	80.00	80.00	0.00	0.00	0.00	0.00

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- A new row will be available in the grid section.
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- All other fields are not anymore necessary so you can leave those out.

This is how Units Description column will look like when you follow the above steps.

Column Designer - Income Statement - April 13, 2018 14:6:16

New Save Search Delete Undo Duplicate Import Export Close

Details Audit Log

Column Name: Income Statement - April 13, 2018 14:6:16 Description: Income Statement Template Column Type: User Defined Run Date: 04/13/2018

+ Insert X Remove Export View Filter (F3)

ID	Column Type*	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Code	Percentage	Width	Alignment	Format
C1	Row Id	Row Id	Column Name						Add Record			160	Left	
C2	Row Name	Row Name	Column Name						Add Record			300	Left	
C3	GL Amounts	Current Year	Year	BOY	0	01/01/2018	04/30/2018		Add Record			160	Right	###0
C4	GL Amounts	Prior Year	Year	BOY-1yr	EOY-1yr	01/01/2017	12/31/2017		Add Record			160	Right	###0
C5	Units	Total Units	Column Name	BOY	0	01/01/2018	04/30/2018		Add Record			160	Right	###0.00;(###0.00)
C6	Units Description	Units Description	Column Name						Add Record			160	Right	

Here's how it is shown when report is previewed/printed. Highlighted is the **Units Description** column type.

Income Statement - April 13, 2018 14:6:16
As Of 4/13/2018

Friday, April 13, 2018
4:10 PM

Row Id	Row Name	2018	2017	Total Units	Units Description
R3	Revenue	0	27,181	0.00	
R4	Sales	217,334	2,147,320	79,648.07	
R5	Sales Discounts	0	-27	0.00	
R6	Other Income	3,903	177,812	5.00	
R9	Total Revenues :	221,237	2,352,286	79,653.07	
R12	Expense	400	-1,355	0.00	
R13	Cost of Goods Sold	2,088	3,212	1,116.32	
R14	Purchases	276,813	8,228,188	81,973.42	
R15	Purchases Discounts	-60	-4,684	1,616,431.72	
R16	Other Purchases	-3,746	5,089	(4,998.00)	
R17	Payroll Cogs	0	1,575	0.00	
R18	Other Expenses	15,727	-35,938,515	16,005.50	
R20	Payroll Earnings	85,594	542,299	(411.00)	
R21	Payroll Tax Expenses	0	30	0.00	
R22	Payroll Expenses	7,465	57,963	3.00	
R24	Total Expenses :	384,281	-27,106,198	1,710,120.96	
R26	NET PROFIT(LOSS) :	-163,044	29,458,484	(1,630,467.89)	

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This is how Units Description column will look like when you follow the above steps.

Column Designer - Trial Balance

NewSaveSearchDeleteUndoDuplicateClose

DetailsAudit Log (18)

Trial BalanceDescription: Trial Balance prev and cur yearRun Date: 12/31/2015

+ InsertX RemoveArrangeLayoutFilter Records (F3)

ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Code	Percentage	Width	Alignment	Format	Hidden
C1	Row Id		Column Name									50	Left	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C2	Row Name		Column Name									200	Left	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C3	Beginning Balance	Beg Balance	Column Name	BOT	-1	01/01/1900	11/30/2015					160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C4	Debit	Total Debit	Column Name	0	0	12/01/2015	12/31/2015					160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C5	Credit	Total Credit	Column Name	0	0	12/01/2015	12/31/2015					160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C6	Ending Balance	End Balance	Column Name	BOT	0	01/01/1900	12/31/2015					160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C7	Debit Units	Total Debit Units	Column Name	0	0	12/01/2015	12/31/2015					160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C8	Credit Units	Total Credit Units	Column Name	0	0	12/01/2015	12/31/2015					160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C9	Units	Total Units	Column Name	0	0	12/01/2015	12/31/2015					160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>
C10	Units Description	Units Description	Column Name									160	Right	#,##0.00;(#,##0.00)	<input type="checkbox"/>

Here's how it is shown when report is previewed/printed. Highlighted is the **Units Description** column type.

Trial BalanceAs Of 12/31/2015

Wednesday, February 10, 20168:37 PM

		Beg Balance	Total Debit	Total Credit	End Balance	Total Debit Units	Total Credit Units	Total Units	Units Description
R2	10000 - Check book in Bank	7,992.04	0.00	0.00	7,992.04	0.00	0.00	0.00	
R4	12000 - Accounts Receivable	700.00	140.00	0.00	840.00	0.00	0.00	0.00	
R8	16000 - Inventory	11,300.00	2,990.00	0.00	14,290.00	0.00	0.00	0.00	
R9	16001 - Inventory-Item1	1,100.00	0.00	0.00	1,100.00	0.00	0.00	0.00	
R11	16003 - Inventory - Test1	2,690.00	0.00	0.00	2,690.00	0.00	0.00	0.00	
R14	16007 - Inventory - Coffee	1.25	0.00	0.00	1.25	0.00	0.00	0.00	
R18	16022 - Inventory - RM	2,480.00	0.00	0.00	2,480.00	0.00	0.00	0.00	
R21	16025 - Inventory in Transit new	3,500.00	0.00	0.00	3,500.00	0.00	0.00	0.00	
R22	16100 - Inventory in Transit	120.00	0.00	0.00	120.00	0.00	0.00	0.00	
R24	20000 - Accounts Payable	(2,010.00)	0.00	0.00	(2,010.00)	0.00	0.00	0.00	
R25	21000 - AP Clearing	(17,400.00)	0.00	2,990.00	(20,390.00)	0.00	0.00	0.00	
R26	21001 - AP Clearing new	(2,481.25)	0.00	0.00	(2,481.25)	0.00	0.00	0.00	
R30	24010 - Payroll Taxes	(45.00)	0.00	0.00	(45.00)	0.00	0.00	0.00	
R31	24050 - Federal Income Tax	(2,738.38)	0.00	0.00	(2,738.38)	0.00	0.00	0.00	
R32	24110 - FICA ans Social Security	(1,621.16)	0.00	0.00	(1,621.16)	0.00	0.00	0.00	
R33	24150 - FICA Medicare	(379.14)	0.00	0.00	(379.14)	0.00	0.00	0.00	
R34	24201 - State Tax	(382.50)	0.00	0.00	(382.50)	0.00	0.00	0.00	
R36	24550 - 401K Deductions	(126.00)	0.00	0.00	(126.00)	0.00	0.00	0.00	
R39	24850 - Employer FUTA	(88.59)	0.00	0.00	(88.59)	0.00	0.00	0.00	
R40	24900 - Employer SUTA	(63.99)	0.00	0.00	(63.99)	0.00	0.00	0.00	
R54	35000 - Owners Equity	(10.25)	0.00	0.00	(10.25)	0.00	0.00	0.00	
R58	39000 - Retained Earnings	(1,000.00)	600.00	0.00	(400.00)	0.00	0.00	0.00	
R62	40000 - Sales	(560.00)	0.00	0.00	(560.00)	0.00	0.00	0.00	
R65	40003 - Sales - Test1	(140.00)	0.00	0.00	(140.00)	0.00	0.00	0.00	
R76	41500 - Fee Income	(100.00)	0.00	0.00	(100.00)	0.00	0.00	0.00	
R77	42000 - Interest Income	(200.00)	0.00	0.00	(200.00)	0.00	0.00	0.00	
R78	43000 - Options Income	(300.00)	0.00	0.00	(300.00)	0.00	0.00	0.00	
R79	44000 - Credit Card Fee	(400.00)	0.00	0.00	(400.00)	0.00	0.00	0.00	
R81	47000 - Sales Advance	(500.00)	0.00	0.00	(500.00)	0.00	0.00	0.00	pounds
R83	49000 - Other Income	(14,989.75)	0.00	1,000.00	(15,989.75)	0.00	100.00	(100.00)	pounds
R85	49200 - Software	0.00	0.00	140.00	(140.00)	0.00	0.00	(1.00)	
R87	50000 - Purchases Default	400.00	0.00	0.00	400.00	0.00	0.00	0.00	pounds
R90	50003 - COGS - Test1	100.00	0.00	0.00	100.00	0.00	0.00	0.00	
R100	54100 - Salary Earnings	8,500.00	0.00	0.00	8,500.00	0.00	0.00	0.00	
R102	54511 - Leave of Absence	4,700.00	0.00	0.00	4,700.00	0.00	0.00	0.00	
R105	56000 - Employer Expenses	810.59	0.00	0.00	810.59	0.00	0.00	0.00	
R106	56200 - Employer FICA Med	189.57	0.00	0.00	189.57	0.00	0.00	0.00	
R107	56300 - Employer FUTA	88.59	0.00	0.00	88.59	0.00	0.00	0.00	
R108	56400 - Employer SUTA	63.99	0.00	0.00	63.99	0.00	0.00	0.00	
R110	60000 - Miscellaneous Expense	0.00	400.00	0.00	400.00	40.00	0.00	40.00	pounds
R131	80000 - Inventory Adjustment	190.00	0.00	0.00	190.00	0.00	0.00	0.00	
R132	81000 - Labor	10.00	0.00	0.00	10.00	0.00	0.00	0.00	
R134	99000 - Wash Account	1,500.00	0.00	0.00	1,500.00	0.00	0.00	0.00	
R136		0.00	4,130.00	4,130.00	0.00	40.00	100.00	(61.00)	