

How to Add Row Name column

The **Row Name column** is used to show the Row Name entered for each row in the Row Designer record. This is a useful information on report, which tells you the the row name entered each row.

Follow these steps on how to create Row Name column type.

1. A new row will be available in the grid section.
2. In the **Column Type** field, select Row Name.
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 Row Name column will look like when you follow the above steps.

The screenshot shows the 'Column Designer' window for a 'Balance Sheet' report. The 'Details' tab is active. The 'Column Name' is 'Balance Sheet - June 20, 2019 10:2:58', the 'Description' is 'Standard Balance Sheet Template', and the 'Column Type' is 'User Defined'. The 'Run Date' is '06/20/2019'. Below the configuration fields is a table of columns. The second row, 'C2', is highlighted in yellow and has the 'Row Name' column type selected. The table has columns for ID, Column Type, Column Name, Caption, Start Offset, End Offset, Start Date, End Date, Column Calculation, Segment Filter, and Budget Co.

ID	Column Type	Column Name	Caption	Start Offset	End Offset	Start Date	End Date	Column Calculation	Segment Filter	Budget Co
C1	Row Id	Row Id	Column Name							
C2	Row Name	Column Name								
C3	GL Amounts	Current Year	Column Name	BOT	0	01/01/1900	06/30/2019			
C4	Units	Current Units	Column Name	BOT	0	01/01/1900	06/30/2019			
C5	GL Amounts	Prior Year	Column Name	BOT	EOY-1yr	01/01/1900	12/31/2018			
C6	Units	Prior Units	Column Name	BOT	EOY-1yr	01/01/1900	12/31/2018			
C7	Ending Balance	Ending Balance	Column Name	BOT	0	01/01/1900	06/30/2019			
C8	Percentage	Percentage	Column Name							

And here is the Row Designer setup. The value entered in the Row Name field will be shown on the report > Row Name column.

The screenshot shows the 'Row Designer' window for a 'Balance Sheet' report. The 'Details' tab is active. The 'Row Name' is 'Balance Sheet - June 20, 2019 10:2:58', the 'Description' is 'Standard Balance Sheet Template', and the 'Report Type' is 'Balance Sheet'. Below the configuration fields is a table of rows. The second row, 'R2', is highlighted in yellow and has the 'Row Name' row type selected. The table has columns for Row Type, ID, Row Type*, Row Name, Row Calculation, Percentage, Override Row Calculation, and Date Override.

Row Type	ID	Row Type*	Row Name	Row Calculation	Percentage	Override Row Calculation	Date Override
Cash Flow Activity	R1	Column Name					
Column Name	R2	Row Name - Left Align	Asset				
Column Name - Page Header	R3	Filter Accounts	Asset				None
Double Underscore	R4	Filter Accounts	Current Assets				None
Filter Accounts	R5	Filter Accounts	Cash Accounts				None
Line	R6	Filter Accounts	Undeposited Funds				None
None	R7	Filter Accounts	Receivables				None
Page Break	R8	Filter Accounts	Prepays				None
Row Calculation	R9	Filter Accounts	Inventories				None
Row Name	R10	Filter Accounts	Quick Turn Assets				None
Row Name - Center Align	R11	Filter Accounts	Non-Current Assets				None
Row Name - Left Align	R12	Filter Accounts	Other Assets				None
Row Name - Right Align	R13	Filter Accounts	Fixed Assets				None
Underscore	R14	Underscore					

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

Balance Sheet - June 20, 2019 10:2:58							Thursday, June 20, 2019 11:08 AM	
As Of 6/20/2019								
Row Id		Current Year	Current Units	Prior Year	Prior Units	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	864,493,971	70,990,725	849,891,602	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	51,305,985	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	73,890	-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%	

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2. In the **Column Type** field, select Row Name.
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
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 - 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 Row Name column will look like when you follow the above steps.

Column Designer - Balance Sheet - September 05, 2018 10:6:59

NewSaveSearchDeleteUndoDuplicateImportExportClose

DetailsAudit Log

Column NameBalance Sheet - September 05, 2018 10:6DescriptionStandard Balance Sheet TemplateColumn TypeUser DefinedRun Date09/05/2018

+ InsertX RemoveExportViewFilter (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	GL Amounts	Current Year	Filter Type	BOY	0	01/01/2018	09/30/2018		Add Record	
C3	Units	Current Units	Column Name	BOY	0	01/01/2018	09/30/2018		Add Record	
C4	GL Amounts	Prior Year	Filter Type	BOY-1yr	EOY-1yr	01/01/2017	12/31/2017		Add Record	
C5	Units	Prior Units	Column Name	BOY-1yr	EOY-1yr	01/01/2017	12/31/2017		Add Record	
C6	Budget	Budget	Filter Type	BOY	0	01/01/2018	09/30/2018		Add Record	2018 budg
									Add Record	

And here is the Row Designer setup. The value entered in the Row Name field will be shown on the report > Row Name column.

Row Designer - Balance Sheet - September 05, 2018 10:6:59

New Save Search Delete Undo Duplicate Missing Accounts Import Export Close

Details Audit Log

Row Name: Balance Sheet - September 05, 2018 10:6:59 Description: Standard Balance Sheet Template Report Type: Balance Sheet

X Remove Options Generate ShowHide GL COA Formula Highlight Export View Filter (F3)

Row Type	ID	Row Type*	Row Name	Row Calculation	Percentage	Override Row Calculation	Date Override
Cash Flow Activity	R1	Column Name					
Column Name	R2	Row Name - Left Align	Asset				
Column Name - Page Header	R3	Filter Accounts	Asset				None
Double Underscore	R4	Filter Accounts	Current Assets				None
Filter Accounts	R5	Filter Accounts	Non-Current Assets				None
Line	R6	Filter Accounts	Fixed Assets				None
None	R7	Filter Accounts	Test2				None
Page Break	R8	Filter Accounts	Cash Accounts				None
Row Calculation	R9	Filter Accounts	Undeposited Funds				None
Row Name - Center Align	R10	Filter Accounts	Receivables				None
Row Name - Left Align	R11	Filter Accounts	Prepays				None
Row Name - Right Align	R12	Filter Accounts	Inventories				None
Underscore	R13	Filter Accounts	Quick Turn Assets				None

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

Balance Sheet - September 05, 2018 10:6:59
As Of 9/5/2018

Thursday, September 6, 2018
10:36 AM

	01/01/2018 - 09/30/2018	Current Units	01/01/2017 - 12/31/2017	Prior Units	01/01/2018 - 09/30/2018
Asset					
Asset	46,234,608	6,493,786	496,606	543	2,520.00
Cash Accounts	-59,130,024	-6,492,765	-76,829,040	1	0.00
Receivables	-5,064,129	201,322	1,604,283	1,006,333	0.00
Inventories	9,040,299	189,102	511,384,760	43,060,304	0.00
Other Assets	63,899	341,295	-1,032,212	-395,499	0.00
Total Assets :	-8,855,357	50,150	435,624,397	43,771,772	2,520.00
Liability					
Liability	160,066	0	51,475	8	0.00
Payables	-16,677,947	444,020	10,773,735	-170,460	0.00
Other Payables	9,942,948	1,079,544	395,106,004	43,014,153	0.00
Sales Tax Payables	59	0	4,741	0	0.00
Payroll Tax Liabilities	440	0	464	0	0.00
Pending Payables	15,115	61,824	9,196	5,324	0.00
Payroll Taxes Current	89,801	0	126,875	0	0.00
Payroll Deductions	23,512	0	30,318	0	0.00
Employer Liability	32,742	-2	46,023	-2	0.00
Total Liabilities :	-6,413,264	1,585,386	406,149,631	42,849,023	0.00
Equity					
Owners Equities	-2	0	-54	0	9,461.00
Retained Earnings	82,842,600	-834,630	53,367,779	-37,435	0.00
Total Equity :	82,842,598	-834,630	53,367,725	-37,435	9,461.00
Current Year Earning :	-2,442,093	-1,441,068	29,474,820	57,078	(5,358.00)
Total Equity :	80,400,505	-2,275,698	82,842,545	19,643	4,103.00
Total Liabilities and Equity :	73,987,241	-690,313	488,992,176	42,868,666	4,103.00

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And here is the Row Designer setup. The value entered in the Row Name field will be shown on the report > Row Name column.

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

Income Statement - April 13, 2018 14:6:16			
As Of 4/13/2018		Friday, April 13, 2018 3:49 PM	
Row Id	Row Name	2018	2017
Revenue			
R3	Revenue	0	27,181
R4	Sales	217,334	2,147,320
R5	Sales Discounts	0	-27
R6	Other Income	3,903	177,812
R9	Total Revenues :	221,237	2,352,286
Expense			
R12	Expense	400	-1,355
R13	Cost of Goods Sold	2,088	3,212
R14	Purchases	276,813	8,228,188
R15	Purchases Discounts	-60	-4,684
R16	Other Purchases	-3,746	5,089
R17	Payroll Cogs	0	1,575
R18	Other Expenses	15,727	-35,938,515
R20	Payroll Earnings	85,594	542,299
R21	Payroll Tax Expenses	0	30
R22	Payroll Expenses	7,465	57,963
R24	Total Expenses :	384,281	-27,106,198
R26	NET PROFIT(LOSS) :	-163,044	29,458,484

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This is how Row Name column will look like when you follow the above steps.

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	Row ID	Column Name									160	Left	#,##0.00(##,##0.00)	<input type="checkbox"/>
C2	Row Name	Row Name	Column Name									250	Left	#,##0.00(##,##0.00)	<input type="checkbox"/>
C3	GL Amounts	Current	Year	BOY	0	01/01/2015	12/31/2015					160	Right	#,##0.00(##,##0.00)	<input type="checkbox"/>
C4	GL Amounts	Previous	Year	BOY-1yr	EOY-1yr	01/01/2014	12/31/2014					160	Right	#,##0.00(##,##0.00)	<input type="checkbox"/>
C5	Filter Accounts		Column Name									160	Right	#,##0.00(##,##0.00)	<input type="checkbox"/>

And here is the Row Designer setup. The value entered in the Row Name field will be shown on the report > Row Name column.

Row Type	ID	Row Type	Row Name	Row Calculation	Balance Side	Filter Accounts	Source	Account Type	Print Each	Hidden
Cash Flow Activity	R1	Line							<input type="checkbox"/>	<input type="checkbox"/>
Column Name	R2	None							<input type="checkbox"/>	<input type="checkbox"/>
Column Name Page Header	R3	Column Name							<input type="checkbox"/>	<input type="checkbox"/>
Double Underscore	R4	Filter Accounts	Revenue		Credit	[Type] = 'Revenue'	Column	BS	<input type="checkbox"/>	<input type="checkbox"/>
Filter Accounts	R5	Filter Accounts	Expense		Debit	[Type] = 'Expense'	Column	BS	<input type="checkbox"/>	<input type="checkbox"/>
Line	R6	Underscore							<input type="checkbox"/>	<input type="checkbox"/>
None	R7	Row Calculation	Net Income	R4-R5					<input type="checkbox"/>	<input type="checkbox"/>
Page Break	R8	Double Undersc...							<input type="checkbox"/>	<input type="checkbox"/>
Percentage	R9	Page Break							<input type="checkbox"/>	<input type="checkbox"/>
Row Calculation	R10	Row Name - Left ...	Left align row test						<input type="checkbox"/>	<input type="checkbox"/>
Row Name - Center Align	R11	Row Name - Cen...	Center align row ...						<input type="checkbox"/>	<input type="checkbox"/>
Row Name - Left Align	R12	Row Name - Righ...	Right align row t...						<input type="checkbox"/>	<input type="checkbox"/>
Row Name - Right Align									<input type="checkbox"/>	<input type="checkbox"/>

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

Income Statement A				Friday, February 12, 2016	
As Of 12/31/2015				9:47 PM	
Row ID	Row Name	2015	2014		
R4	Revenue	18,329.75	1,000.00	[Type] = 'Revenue'	
R5	Expense	16,952.74	0.00	[Type] = 'Expense'	
R7	Net Income	1,377.01	1,000.00		

- A new row will be available in the grid section.
- Leave Column Description and Caption fields blank.
- In the **Column Type** field, select Row Description.
- Leave all other fields that follow, except Width and Alignment. Those are not anymore necessary.
- 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.
- 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

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

ID	Column Description	Caption	Column Type	Filter Type	Related Columns	Segment Used	Budget Code	Start Date	End Date	Width	Alignment	Format	Hidden
1	Column Header	Row Id	Row Description							100	Left	#,###.00;(#,###.00)	
2	Column Header	Row Description	Row Description							250	Left	#,###.00;(#,###.00)	
3	Previous	Column Header	Calculation	Previous Fiscal Year						160	Right	#,###.00;(#,###.00)	
4	Current	Column Header	Calculation	Fiscal Year						160	Right	#,###.00;(#,###.00)	
5	Total	Column Header	Column Calculation		C3 + C4					160	Right	#,###.00;(#,###.00)	

The Row Description column is used to show the value entered on Description field of each and every row configured on your row designer.

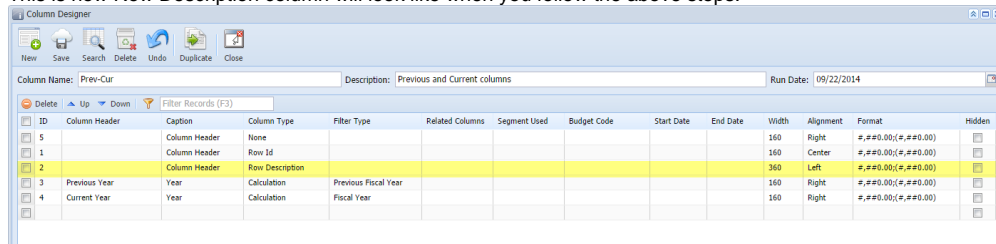
ID	Description	Row Type	Related Rows	Balance Side	Filter Accounts
15		Line		Debit	
14		Description Title		Debit	
1	40000 - Sales	Calculation		Credit	[Primary Account] = '40000'
2	50000 - Cost of Goods Sold	Calculation		Debit	[Primary Account] = '50000'
8		Underscore		Debit	
7	Gross Margin	Total Calculation	R1 - R2	Debit	
9	Gross Margin Rate	Total Calculation	R7 / R1	Debit	
10		None		Debit	
4	60000 - Other Expenses	Calculation		Debit	[Primary Account] = '60000'
6	70000 - Other Revenues	Calculation		Credit	[Primary Account] = '70000'
13		Underscore		Debit	
11	Net Income	Total Calculation	R7 - R4 + R6	Debit	
12		Double Underscore		Debit	

This is how Row Description column be shown when you preview or print your financial report.

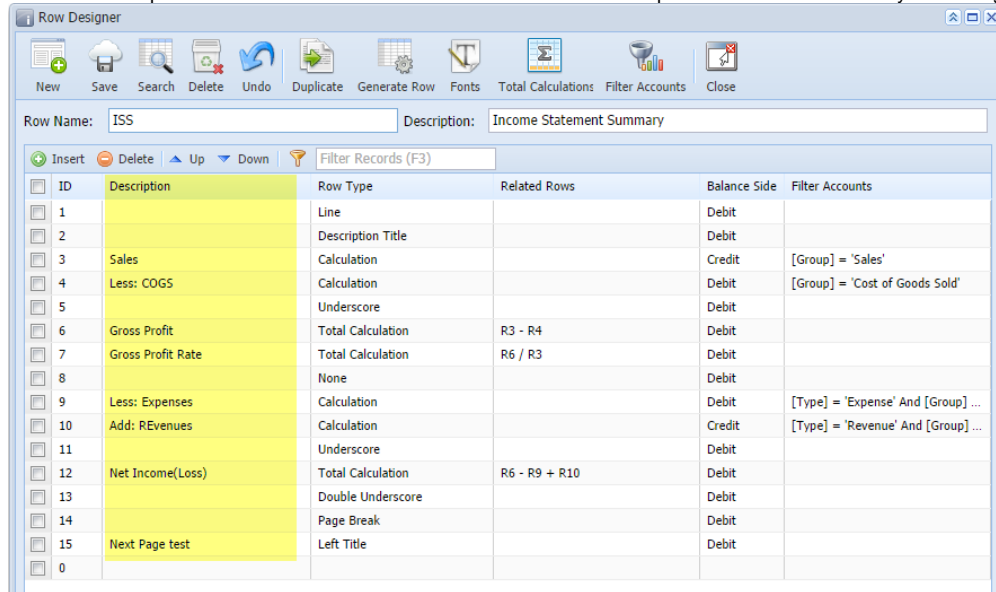
ID	Description	Previous	Current	Total
R1	40000 - Sales	1,000.00	2,500.00	3,500.00
R2	50000 - Cost of Goods Sold	150.00	800.00	950.00
R7	Gross Margin	850.00	1,700.00	2,550.00
R9	Gross Margin Rate	85.00%	68.00%	72.86%
R4	60000 - Other Expenses	50.00	900.25	950.25
R6	70000 - Other Revenues	0.00	200.00	200.00
R11	Net Income	800.00	999.75	1,799.75

1. A new row will be available in the grid section.
2. Leave Column Header and Caption fields blank.
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4. Leave all other fields that follow, except Width and Alignment. Those are not anymore necessary.
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This is how Row Description column be shown when you preview or print your financial report.

ISS - PrevCur
As Of 9/17/2014

Monday, September 22, 2014
6:22 PM

		2013	2014
R3	Sales	4,260.00	4,960.00
R4	Less: COGS	1,110.00	1,510.00
R6	Gross Profit	3,150.00	3,450.00
R7	Gross Profit Rate	73.94%	69.56%
R9	Less: Expenses	486.00	990.00
R10	Add: REvenues	1,050.00	1,416.00
R12	Net Income (Loss)	3,714.00	3,876.00