

How to Add Date Range header/footer

The **Date Range header/footer** is used to add date coverage for your financial report.

Follow the steps below to guide you on how to add date range header/footer.

1. A new row will be available in the grid section.
2. In the **Type** field, select Date Range.
3. Leave the **Header/Footer Name** field blank.
4. The **Row Name** field dictates the order of the header/footer. Set this field to 1 if this will be the first row to show in the header/footer, 2 if second row, so on and so forth. Set this to 3 for this illustration.
5. In the **Alignment** field, set how the value for the column be displayed. Set this to Center.
6. In the **With** field, select Page. This will occupy the entire page.
7. Leave **Column Name** field blank.

This is how Date Range header/footer setup will look.

Type	Header/Footer Name	Row Number	Alignment	With	Column From	Column To
Custom	Test i21 Comp...	1	Left	Page		
<input checked="" type="checkbox"/> Date Range		2	Left	Page		

Select this Report Header in the Report Builder and make sure that the checkbox before it is checked when printing/previewing the report.

Header & Footer

<input type="checkbox"/> Page Header		<input checked="" type="checkbox"/> Report Header	Test Header Company
<input type="checkbox"/> Page Footer		<input type="checkbox"/> Report Footer	

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Test i21 Company				
As Of 6/25/2019				
	Current Year	Current Units	Prior Year	Prior Units
Asset				
Asset	36,886,600	28,888,448	36,784,018	28,888,448
Cash Accounts	-79,545,020	-29,108,521	-78,466,735	-29,108,477
Receivables	25,035,157	3,739,651	24,712,446	3,692,276
Prepays	1,790,236	3,022,819	1,790,236	3,022,819
Inventories	1,120,448,855	79,188,581	849,891,599	72,783,243
Other Assets	-1,468,117	-8,023,023	-1,455,776	-7,091,840
Total Assets :	1,103,147,711	77,707,955	833,255,788	72,186,469
Liability				
Liability	280,527	8	271,752	8
Payables	36,218,273	2,986,400	11,622,715	-412,393
Other Payables	981,190,200	53,077,903	736,208,705	51,305,985
Sales Tax Payables	861,468	0	861,438	0
Payroll Tax Liabilities	496	0	496	0
Pending Payables	554,020	242,238	415,437	151,163
Payroll Taxes Current	203,601	0	200,993	0
Payroll Deductions	42,521	0	41,749	0
Employer Liability	76,430	-4	75,335	-4
Total Liabilities :	1,019,427,536	56,306,545	749,698,620	51,044,759

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Report Header and Footer - Custom Header Company

New Save Search Delete Undo Duplicate Options Close

Details Audit Log

Name * Custom Header Company Description Custom Header Company Test

Type * Report Header Column Name

X Remove Up Down Export View Filter (F3)

<input type="checkbox"/>	Type*	Header/Footer Name	Row Number*	Alignment	With	Column Description
<input type="checkbox"/>	Custom	Sample Company	1	Center	Page	
<input checked="" type="checkbox"/>	Date Range		2	Center	Page	
<input type="checkbox"/>						

Select this Report Header in the Report Builder and make sure that the checkbox before it is checked when printing/previewing the report.

Report Builder - Trial Balance Detail - September 07, 2018 13:38:45

New Save Search Delete Undo Duplicate Generate Close

Details Runtime Log Financial History Audit Log

Report Name * Trial Balance Detail - September 07, 2018 13:38: As of Date 09/07/2018

Row Trial Balance Detail - September 07, 2018 13 Segment Filter

Column Trial Balance Detail - September 07, 2018 13 Description Trial Balance Detail Template

Orientation * Portrait

Header & Footer

☐ Page Header ☐ Report Header Custom Header Company

☐ Page Footer ☐ Report Footer

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Sample Company As Of 9/7/2018				
	Beginning Balance	Total Debit	Total Credit	Ending Balance
10000-0000-000 - Wells Fargo - Disbursement - Home office - Admin	6,973,127.02	0.00	0.00	6,973,127.02
10000-9002-006 - Wells Fargo - Disbursement-Austin Tech Hub-Gas	(231,889.21)	0.00	0.00	(231,889.21)
10001-0000-000 - Wells Fargo - Payroll - Home office - Admin	(2.50)	0.00	0.00	(2.50)
10001-0003-000 - Wells Fargo - Payroll - Richmond - Admin	513.18	0.00	0.00	513.18
10002-0000-000 - Fifth Third - AG Operations - Home office - Admin	(67,406.62)	0.00	0.00	(67,406.62)
10003-0000-000 - Fifth Third - Petro Operations - Home office - Admin	(35,677,355.03)	0.00	0.00	(35,677,355.03)
10003-0007-000 - Fifth Third - Petro Operations-Port Albert-Admin	52,558.69	0.00	0.00	52,558.69
10003-0007-001 - Fifth Third - Petro Operations-Port Albert-Grains	23,574.00	0.00	0.00	23,574.00
10003-0007-002 - Fifth Third - Petro Operations-Port Albert-Chemicals	(1,972.00)	0.00	0.00	(1,972.00)
10003-0007-003 - Fifth Third - Petro Operations-Port Albert-Fertilizer	52,588.90	0.00	0.00	52,588.90
10003-0007-004 - Fifth Third - Petro Operations-Port Albert-Petro	(70,975.09)	0.00	0.00	(70,975.09)
10003-0007-006 - Fifth Third - Petro Operations-Port Albert-Gas	62,409.02	0.00	0.00	62,409.02
10003-0101-001 - Fifth Third - Petro Operations-iRely Mart-Grains	1,000.00	0.00	0.00	1,000.00
10003-0101-003 - Fifth Third - Petro Operations-iRely Mart-Fertilizer	(50,000.00)	0.00	0.00	(50,000.00)
10003-0102-007 - Fifth Third - Petro Operations-Dubai Emirates-Diesel	1,000.00	0.00	0.00	1,000.00
10003-0103-003 - Fifth Third - Petro Operations-Amman - Jordan-Fertilizer	1,000.00	0.00	0.00	1,000.00
10003-0103-007 - Fifth Third - Petro Operations-Amman - Jordan-Diesel	1,000.00	0.00	0.00	1,000.00
10003-9000-003 - Fifth Third - Petro Operations-Silicon Valley -Fertilizer	2,000.00	0.00	0.00	2,000.00
10003-9000-005 - Fifth Third - Petro Operations-Silicon Valley -Feed	60.00	0.00	0.00	60.00
10004-0000-000 - Three Rivers - Operating - Grain - Home office - Admin	(12,785,539.42)	0.00	0.00	(12,785,539.42)
10005-0000-000 - Chase- Cash in Bank - Home office - Admin	(3,256,699.17)	0.00	0.00	(3,256,699.17)
10005-9002-006 - Chase- Cash in Bank -Austin Tech Hub-Gas	(41,029,906.40)	0.00	0.00	(41,029,906.40)
10006-0000-000 - Canadian Cash - Home office - Admin	46,233,475.62	0.00	0.00	46,233,475.62
10006-9001-007 - Canadian Cash-Boston Tech Hub-Diesel	(1.08)	0.00	0.00	(1.08)

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i21 Test Company Balance Sheet - X As Of 4/6/2020				
	03/31/2020 - 04/27/2020	03/31/2020 - 05/27/2020	04/28/2020 - 05/27/2020	03/31/2020 - 04/27/2020
Asset				
Liability				
Equity				
Retained Earnings	77,050,828	791,011	77,050,828	791,011
Total Equity :	77,050,828	791,011	77,050,828	791,011
Total Equity :	77,050,828	791,011	77,050,828	791,011
Total Liabilities and Equity :	77,050,828	791,011	77,050,828	791,011

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i21 Test Company Income Statement A As Of 12/31/2015				
Row ID	Row Name	2015	2014	Total
R4	Revenue	18,329.75	1,000.00	19,329.75
R5	Expense	16,952.74	0.00	16,952.74
R7	Net Income	1,377.01	1,000.00	2,377.01

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Description	Type	Group	Alignment	With	Column Description
Report Title	Report Title	1	Center	Page	
Sample Company	Custom	2	Center	Page	
Date Range	Date Range	3	Center	Page	

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Here's how it is shown when report is previewed/printed. Highlighted section is the Date Range type header/footer.

Income Statement				
Sample Company				
As Of 4/14/2015				
		2014	2015	Total
R1	40000 - Sales	1,000.00	4,400.00	5,400.00
R2	50000 - Cost of Goods Sold	150.00	1,200.00	1,350.00
R7	Gross Margin	850.00	3,200.00	4,050.00
R9	Gross Margin Rate	85.00%	72.73%	75.00%
R4	60000 - Other Expenses	50.00	980.25	1,030.25
R6	70000 - Other Revenues	0.00	200.00	200.00
R11	Net Income	800.00	2,419.75	3,219.75

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Report Header and Footer

Name: RH Description: Report Header

Type: Report Header Column Name:

Description	Type	Group	Alignment	With	Column Description
Report Title	Report Title	1	Center	Page	
MY Company	Custom	2	Center	Page	
Date Range	Custom	3	Center	Page	

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Report Builder

Report Name: ISS Description: This is an Income Statement Summary.

Row: ISS Column: Prev-Cur Orientation: Portrait

Header & Footer

☐ Page Header: ☐ Report Header: RH ☐ Report Footer:

Margins

Top: 5 Bottom: 5 Left: 5 Right: 5 Gutter: 0

Options

☐ Show Default Header & Footer ☒ Show Report Settings

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Income Statement			
MY Company			
As Of 12/31/2014			
	2013	2014	
Sales	4,260.00	4,960.00	
Less: COGS	1,110.00	1,510.00	
Gross Profit	3,150.00	3,450.00	
Gross Profit Rate	73.94%	69.56%	
Less: Expenses	486.00	990.00	
Add: REvenues	1,050.00	1,416.00	
Net Income (Loss)	3,714.00	3,876.00	

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