

Reports

Standard reports

Custom reports

Management reports



Report name

Created by

Date range

Email

Action

Sales by Product/Service Detail

Customized

Delete



Transaction Report

Customized

Delete



▼ HST Quarterly Reports Workflow (Modern View)

Edit



Sales by Product/Service Detail

Last quarter

Create a schedule



Taxable Sales Summary

Last quarter

Export as PDF



Taxable Sales Summary - Exempt Purchases

Last quarter

Delete group



Workflow name

Source transaction

Schedule and send a report

Report

1. Do this in QuickBooks

What do you want QuickBooks to do?

Report name

Schedule and send

HST Quarterly Reports Workfl...

Note:

We'll automatically send reports at selected schedule

Create and send recurring report

Start

02/07/2026



at

9:00am



America/Toronto

Repeat every

1

Day

End



12/31/2026



Never

How would you like this action to happen?

Send a company email

Send to

[Add CC](#) | [Add BCC](#)

Subject

Format



Excel



PDF



CSV

Message

[Learn more about variables](#)