



Customization Tips

QuickBooks customers tell us that customizing their software makes them look more professional and helps them save time with day-to-day tasks.

We asked experienced QuickBooks customers for their top customization tips, and are sharing these with you so you can best tailor QuickBooks to your business needs!

Click on the links below to jump to the tip in which you are interested.

Did you know you can...

Customize the QuickBooks Desktop	2
Start working in QuickBooks faster by customizing the QuickBooks desktop	
Customize the icon bar	4
Save time by customizing the icon bar to add shortcuts for quick access to the tasks you frequently perform.	
Customize your Home Page	5
Set up your Home Page to show only the tasks relevant to your business.	
Customize data centers	6
See only the data you want to see in the Customer, Vendor and Employee Centers.	
Customize your report formats	8
Change the formatting of your reports to better reflect your unique business needs.	
Customize reports	10
Set up custom reports and see only the information important to your business.	
Customize forms	11
Create your own distinctive and professional-looking forms, by choosing from over 100 pre-designed templates.	

What do you want to customize?

- **Desktop**
- Icon Bar
- Home Page
- Data Centers
- Report Formats
- Reports
- Forms

- Back to Beginning...

Desktop

Start working in QuickBooks faster!

You can program certain windows to automatically open when you open up your company file, by selecting the “Save when closing company” or “Save current desktop” preference.

Save when closing company means that the windows you have open before you close your company file will be re-opened the next time you open your company file. This will allow you to immediately begin working on the tasks you had been working on the last time you opened up QuickBooks.

Save current desktop means that QuickBooks will remember the windows you have open so that the next time you open up QuickBooks, you will see the same exact windows.

For example, if you spend most of your time creating invoices and paying employees, keep your customer and employee centers open and save current desktop so that these centers will open immediately upon start up.

Continued on the next page...

What do you want to customize?

■ Desktop

■ Icon Bar

■ Home Page

■ Data Centers

■ Report Formats

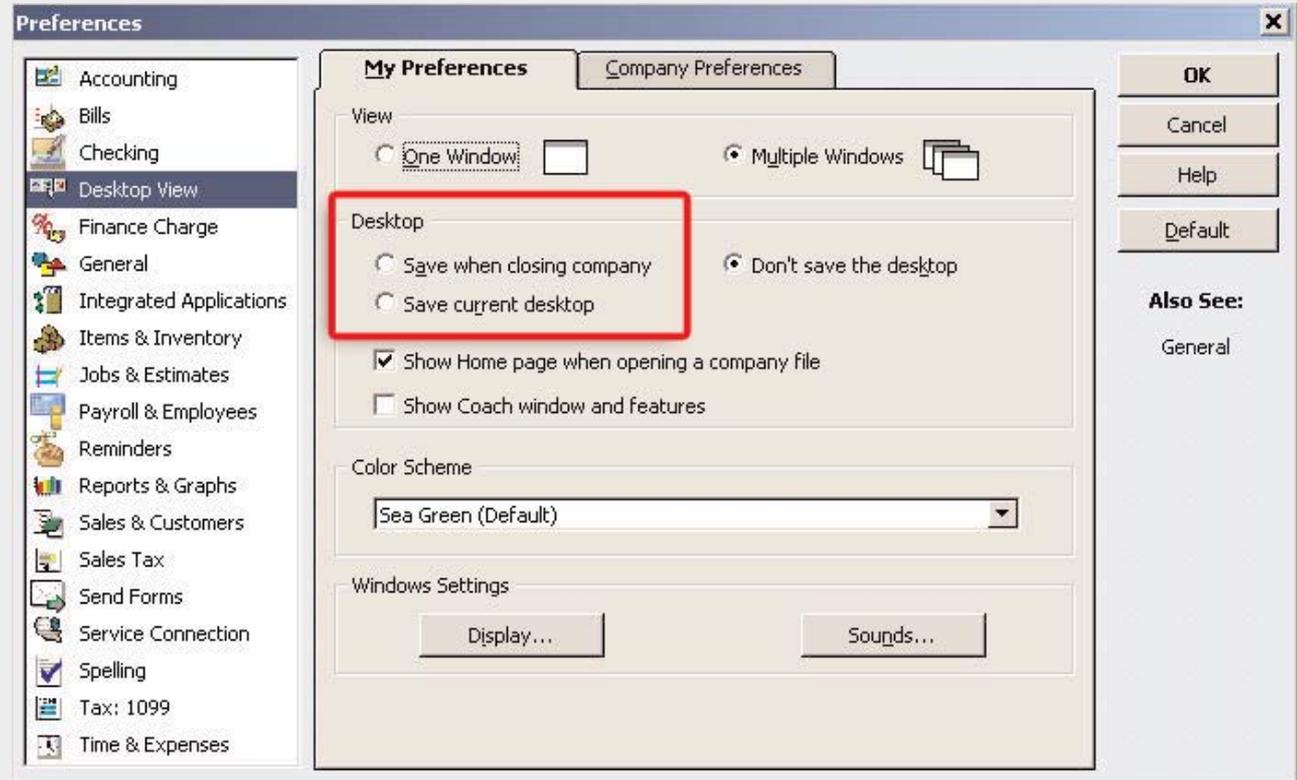
■ Reports

■ Forms

● Back to Beginning...

Desktop (continued)

Go to the **Edit menu >> Preferences >> Desktop View >> My Preferences Tab**



After making your selection, click **OK** to save your preference.

What do you want to customize?

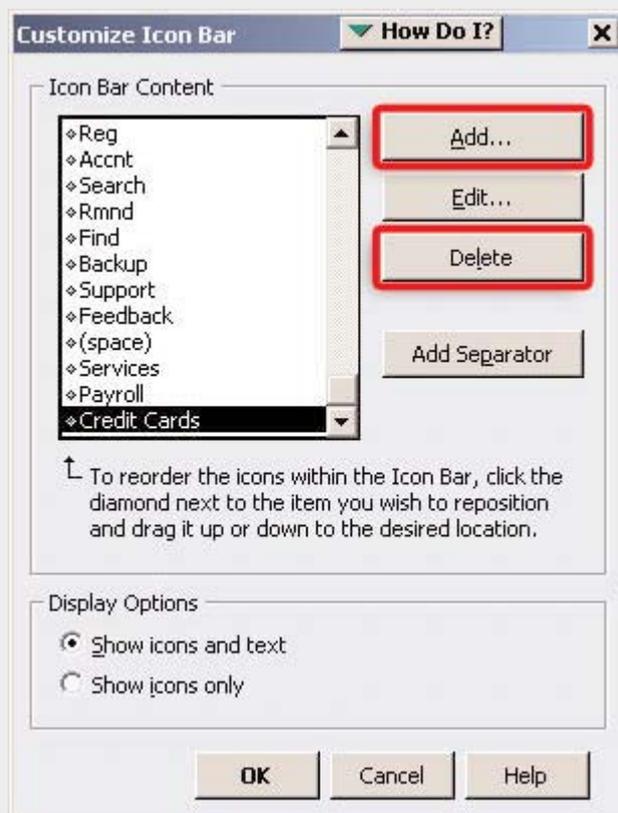
- Desktop
- **Icon Bar**
- Home Page
- Data Centers
- Report Formats
- Reports
- Forms
- Back to Beginning...

Icon Bar

Save time by customizing the icon bar to add shortcuts for quick access to the tasks you frequently perform—and remove shortcut icons you don't use.

Go to the **View menu >> Customize Icon Bar**

(Note: If the menu item is dimmed, go to the View menu and click Icon Bar. Then, go to the View menu again and click Icon Bar.)



Customize Icon Bar How Do I? X

Icon Bar Content

- ◊ Reg
- ◊ Acctnt
- ◊ Search
- ◊ Rmnd
- ◊ Find
- ◊ Backup
- ◊ Support
- ◊ Feedback
- ◊ (space)
- ◊ Services
- ◊ Payroll
- ◊ Credit Cards

Add...
Edit...
Delete
Add Separator

↑ To reorder the icons within the Icon Bar, click the diamond next to the item you wish to reposition and drag it up or down to the desired location.

Display Options

Show icons and text
 Show icons only

OK Cancel Help

What do you want to customize?

- Desktop
- Icon Bar
- **Home Page**
- Data Centers
- Report Formats
- Reports
- Forms
- Back to Beginning...

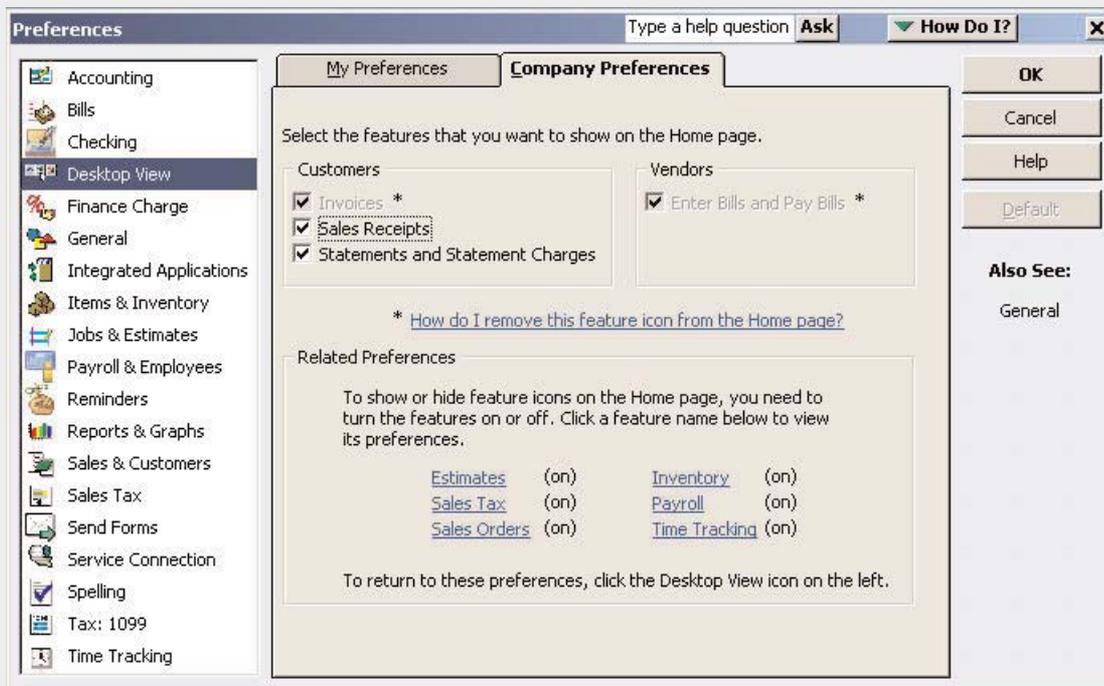
Home Page

Set up your Home Page to show only the tasks relevant to your business.

You can choose to hide or display select icons on the Home Page. If you don't have employees, for example, you may wish to remove the Payroll Center from your Home Page. You can easily do so by setting this preference in Company Preferences.

Go to the **Edit menu >> Preferences >> Desktop View >> Company Preferences Tab**

(Note: Home page icons, such as invoices, cannot be removed from the Home Page if related preferences are enabled. For example, Invoices cannot be removed from the Home Page if either Estimates or Progress Invoicing is enabled.)



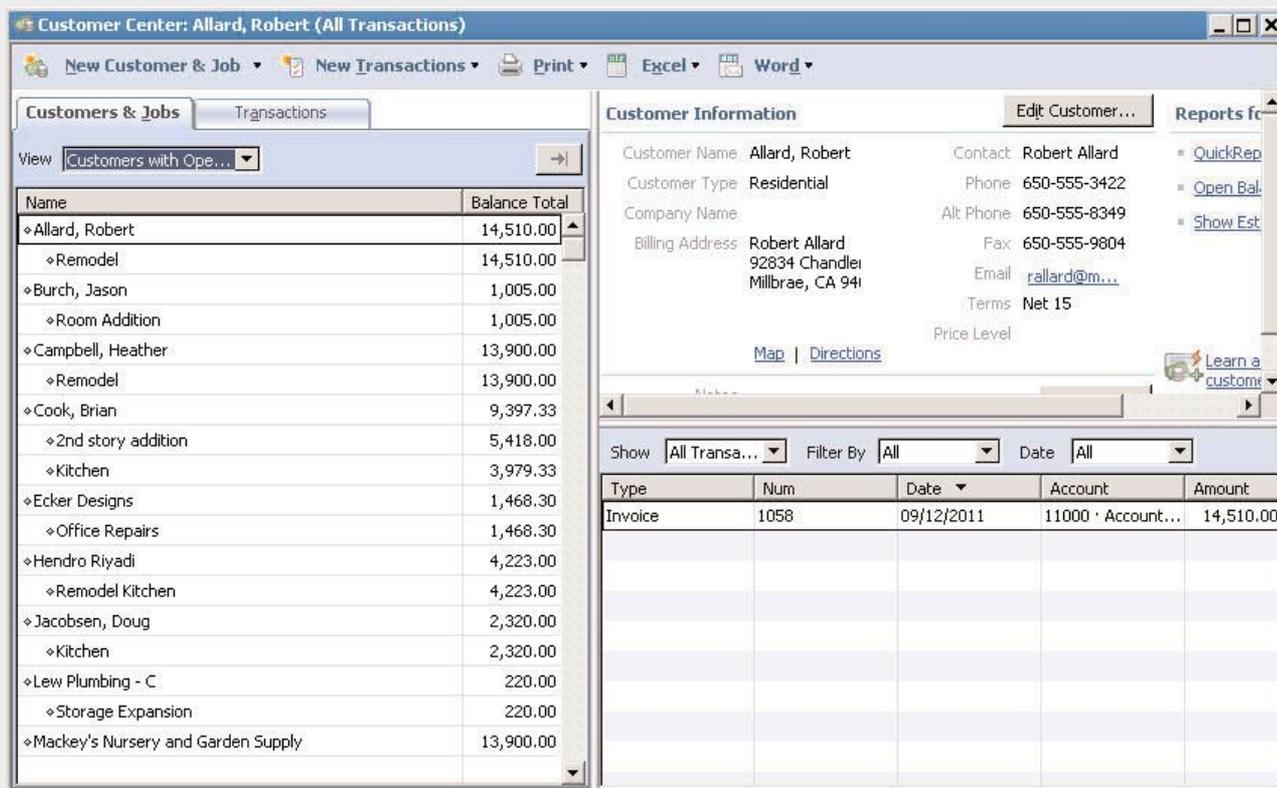
What do you want to customize?

- Desktop
- Icon Bar
- Home Page
- **Data Centers**
- Report Formats
- Reports
- Forms
- Back to Beginning...

Data Centers

See the data you only want to see in the Customer, Vendor and Employee Centers. You can add or remove columns to display the information you are interested in, such as job status or email address. Save time up front by customizing your data columns so you can quickly access this information at any time.

- 1 Go to the **View menu >> Customize Columns** (Note: You must already be in the Customer, Vendor or Employee Center when you go to the View menu to add or remove your column(s).



The screenshot shows the QuickBooks interface for the Customer Center of Robert Allard. The window title is "Customer Center: Allard, Robert (All Transactions)". The interface includes a menu bar with options like "New Customer & Job", "New Transactions", "Print", "Excel", and "Word". Below the menu bar, there are tabs for "Customers & Jobs" and "Transactions". The "View" dropdown is set to "Customers with Op...".

The main area is divided into two panes. The left pane shows a list of transactions with columns for "Name" and "Balance Total". The right pane shows "Customer Information" for Robert Allard, including contact details, company name, and billing address.

Name	Balance Total
◊Allard, Robert	14,510.00
◊Remodel	14,510.00
◊Burch, Jason	1,005.00
◊Room Addition	1,005.00
◊Campbell, Heather	13,900.00
◊Remodel	13,900.00
◊Cook, Brian	9,397.33
◊2nd story addition	5,418.00
◊Kitchen	3,979.33
◊Ecker Designs	1,468.30
◊Office Repairs	1,468.30
◊Hendro Riyadi	4,223.00
◊Remodel Kitchen	4,223.00
◊Jacobsen, Doug	2,320.00
◊Kitchen	2,320.00
◊Lew Plumbing - C	220.00
◊Storage Expansion	220.00
◊Mackey's Nursery and Garden Supply	13,900.00

The Customer Information pane shows the following details:

- Customer Name: Allard, Robert
- Contact: Robert Allard
- Customer Type: Residential
- Phone: 650-555-3422
- Company Name: [Redacted]
- Alt Phone: 650-555-8349
- Billing Address: Robert Allard, 92834 Chandler Millbrae, CA 941
- Fax: 650-555-9804
- Email: rallard@m...
- Terms: Net 15

At the bottom of the window, there is a table with columns for "Type", "Num", "Date", "Account", and "Amount". The first row shows an invoice for 1058 dated 09/12/2011 for an amount of 14,510.00.

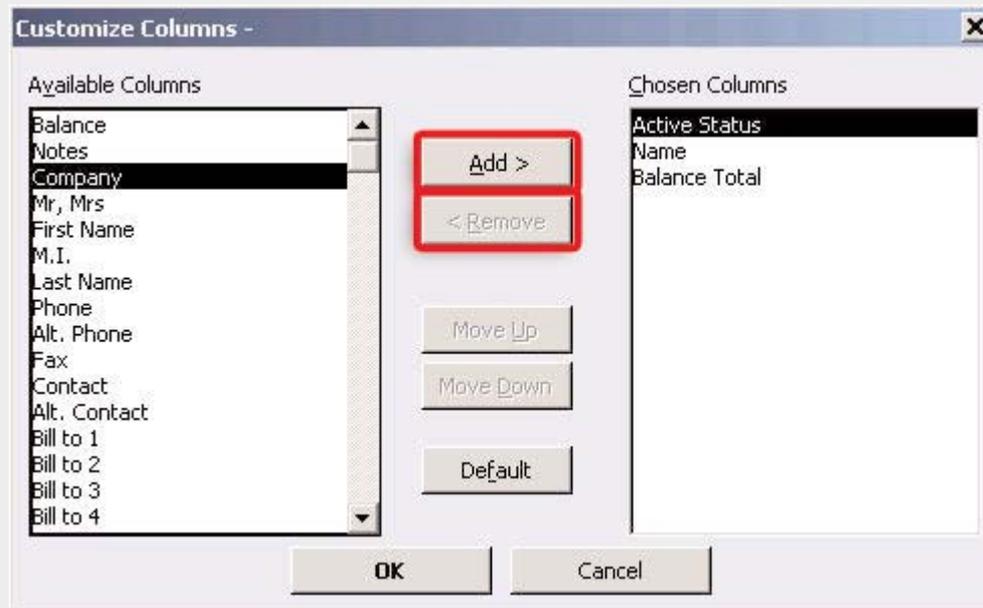
What do you want to customize?

- Desktop
- Icon Bar
- Home Page
- **Data Centers**
- Report Formats
- Reports
- Forms
- Back to Beginning...

Data (continued)

- 2 Select which columns you would like to add by selecting an item under *Available Columns* and clicking **Add**.

You can also remove columns by selecting an item under *Chosen Columns* and clicking **Remove**.



What do you want to customize?

- Desktop
- Icon Bar
- Home Page
- Data Centers
- **Report Formats**
- Reports
- Forms
- Back to Beginning...

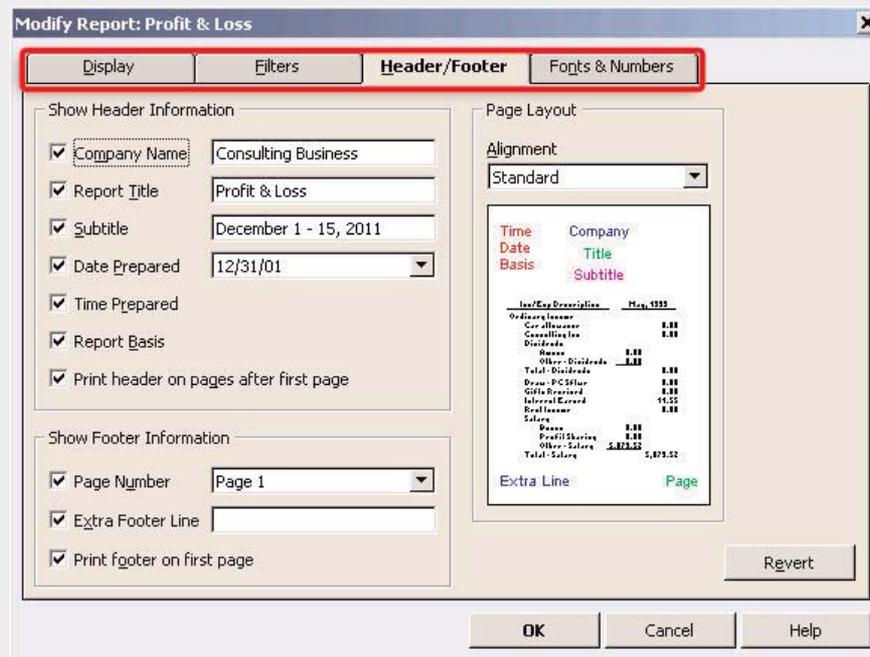
Report Formatting

Change the formatting on reports to better reflect your unique business needs. You can easily change your fonts and add a header or footer to your reports. For instance, if your report has multiple pages, you may want to add page numbers. Or, if you are sharing a confidential report, you may want to mark it as such in the footer.

- 1 Open **your report** >> click **Modify Report** (upper left hand corner)

Modify Report...

- 2 The **Modify Report** window will open, where you can select which columns to display, set filters on the kind of information you wish to see, add important company information, and change your fonts.



Modify Report: Profit & Loss

Display | Filters | **Header/Footer** | Fonts & Numbers

Show Header Information

- Company Name: Consulting Business
- Report Title: Profit & Loss
- Subtitle: December 1 - 15, 2011
- Date Prepared: 12/31/01
- Time Prepared
- Report Basis
- Print header on pages after first page

Show Footer Information

- Page Number: Page 1
- Extra Footer Line
- Print footer on first page

Page Layout

Alignment: Standard

Time	Company	
Date	Title	
Basis	Subtitle	
		May, 2009
Ordinary Income		
Car Allowance		0.00
Consulting Fee		0.00
Dividends		
Dividend		0.00
Other Dividends		0.00
Total Dividends		0.00
Draw - PC Salary		0.00
Gifts Received		0.00
Interest Earned		16.55
Royalties		0.00
Salary		
Drawn		0.00
Profit/Loss		0.00
Other Salary		5,879.52
Total Salary		5,879.52

Extra Line Page

Revert

OK Cancel Help

Continued on the next page...

Report Formatting (continued)

What do you want to customize?

- Desktop
- Icon Bar
- Home Page
- Data Centers
- **Report Formats**
- Reports
- Forms
- Back to Beginning...

It's also easy to resize the width of your Report columns, so you can limit or expand the amount of text you see. Click on the **diamond** between column headers and drag to the appropriate column width.

Larry's Landscaping & Garden Supply
Profit & Loss by Class
October 1 through December 15, 2007

Ordinary Income/Expense	◊ Design	◊ Landscaping	◊ Maintenance
Income			
Landscaping Services			
Design Services	▶ 13,510.00	◀ 0.00	0.00
Job Materials			
Misc Materials	0.00	141.30	0.00
Decks & Patios	45.00	0.00	0.00
Fountains & Garden Lighting	0.00	6,657.90	0.00
Plants and Sod	0.00	4,655.70	186.00
Sprinklers & Drip systems	0.00	3,887.21	0.00
Total Job Materials	45.00	15,342.11	186.00

You can easily change the width of any column by clicking on the diamond and dragging your mouse to the left or right.

What do you want to customize?

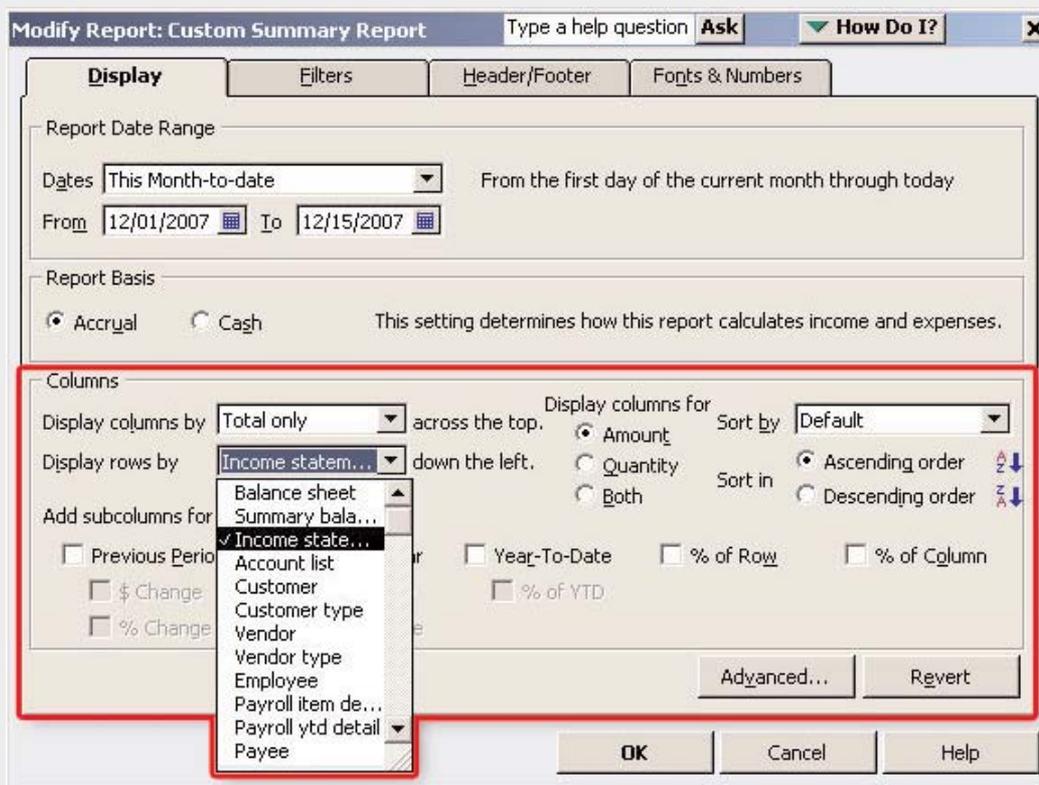
- Desktop
- Icon Bar
- Home Page
- Data Centers
- Report Formats
- **Reports**
- Forms
- Back to Beginning...

Reports

Set up your own custom reports, and see only the information important to your business.

You can create customized income statements which show the profitability of some aspect of your business, by choosing the columns and rows to display.

Go to the **Reports menu >> Custom Summary Report**



Modify Report: Custom Summary Report Type a help question **Ask** **How Do I?** **X**

Display Filters Header/Footer Fonts & Numbers

Report Date Range

Dates: This Month-to-date From the first day of the current month through today

From: 12/01/2007 To: 12/15/2007

Report Basis

Accrual Cash This setting determines how this report calculates income and expenses.

Columns

Display columns by: Total only across the top. Display columns for: Amount Quantity Both Sort by: Default

Display rows by: Income statement... down the left. Sort in: Ascending order Descending order

Add subcolumns for:

- Previous Period
- \$ Change
- % Change

Year-To-Date % of Row % of Column % of YTD

Advanced... Revert

OK Cancel Help

What do you want to customize?

- Desktop
- Icon Bar
- Home Page
- Data Centers
- Report Formats
- Reports
- **Forms**
- Back to Beginning...

Forms

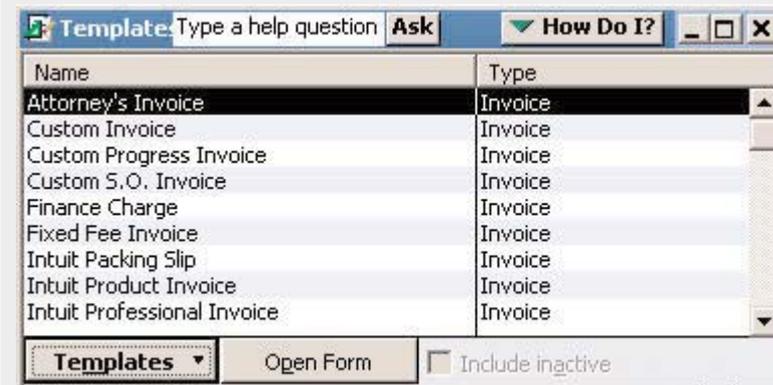
Create your own distinctive and professional-looking forms, by choosing from over 100 pre-designed templates.

Add your logo, your company colors, and essential information to your estimates, purchase orders, invoices, and packing slip.

- 1 Go to the **Lists menu >> Templates**



- 2 There are many different forms to choose from. Select the one you would like to customize by double clicking on it. This will launch the Basic Customization window.



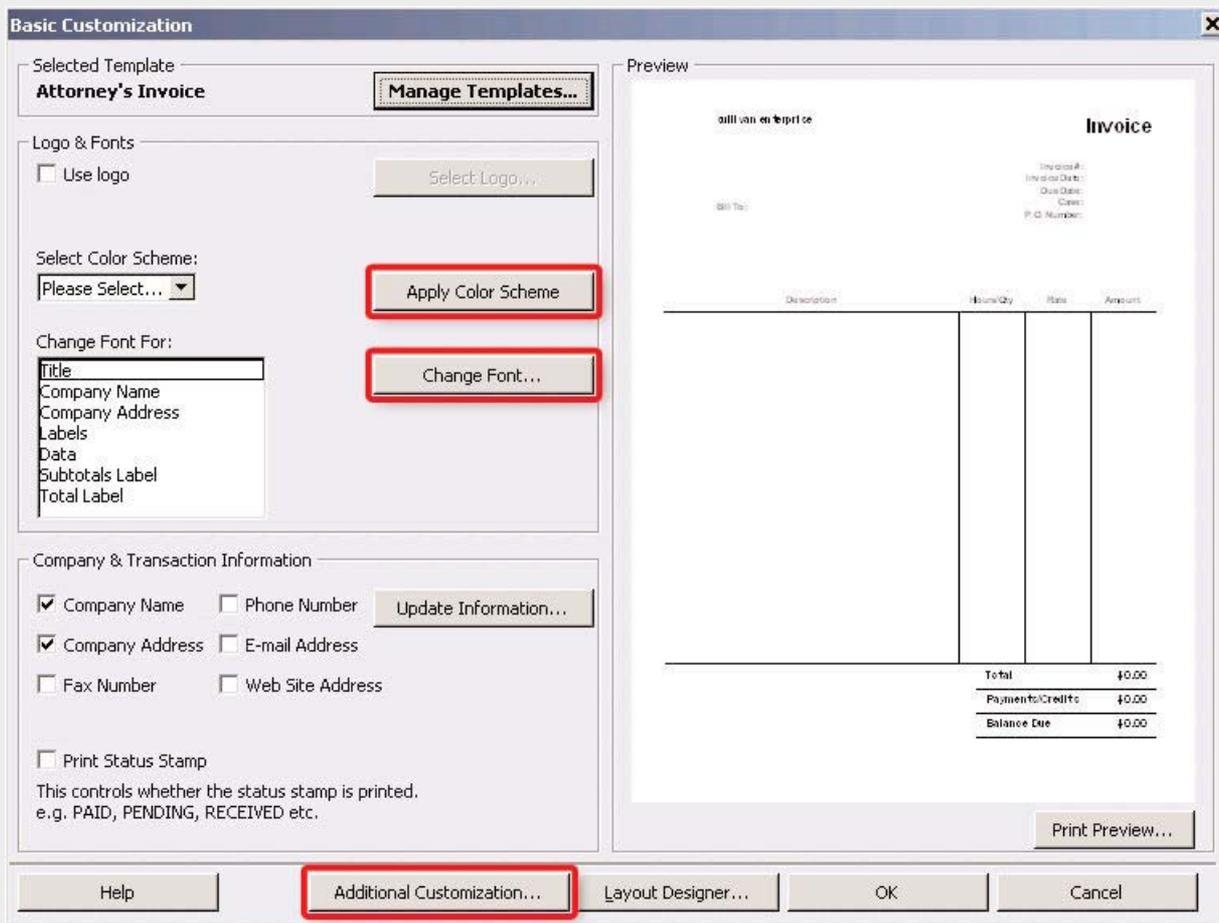
Continued on the next page...

What do you want to customize?

- Desktop
- Icon Bar
- Home Page
- Data Centers
- Report Formats
- Reports
- **Forms**
- Back to Beginning...

Forms (continued)

- 3 Now, you can easily add your logo, change your fonts and add important company information to your form.



The screenshot shows the 'Basic Customization' dialog box for an 'Attorney's Invoice' form. The dialog is divided into several sections:

- Selected Template:** 'Attorney's Invoice' with a 'Manage Templates...' button.
- Logo & Fonts:** Includes a 'Use logo' checkbox and a 'Select Logo...' button. Below this is a 'Select Color Scheme:' dropdown menu with 'Please Select...' and an 'Apply Color Scheme' button. A 'Change Font For:' list includes 'Title', 'Company Name', 'Company Address', 'Labels', 'Data', 'Subtotals Label', and 'Total Label', with a 'Change Font...' button.
- Company & Transaction Information:** Includes checkboxes for 'Company Name', 'Phone Number', 'Company Address', 'E-mail Address', 'Fax Number', and 'Web Site Address', along with an 'Update Information...' button. There is also a 'Print Status Stamp' checkbox with a note: 'This controls whether the status stamp is printed. e.g. PAID, PENDING, RECEIVED etc.'

The right side of the dialog shows a 'Preview' of the invoice form, which includes a header with 'Bill van en entreprise' and 'Invoice', a table with columns 'Description', 'Hours/Qty', 'Rate', and 'Amount', and a summary section with 'Total \$0.00', 'Payments/Credits \$0.00', and 'Balance Due \$0.00'. A 'Print Preview...' button is located at the bottom right of the preview area.

At the bottom of the dialog, there are buttons for 'Help', 'Additional Customization...', 'Layout Designer...', 'OK', and 'Cancel'. The 'Additional Customization...' button is highlighted with a red box.