QuickBooks 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...

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.

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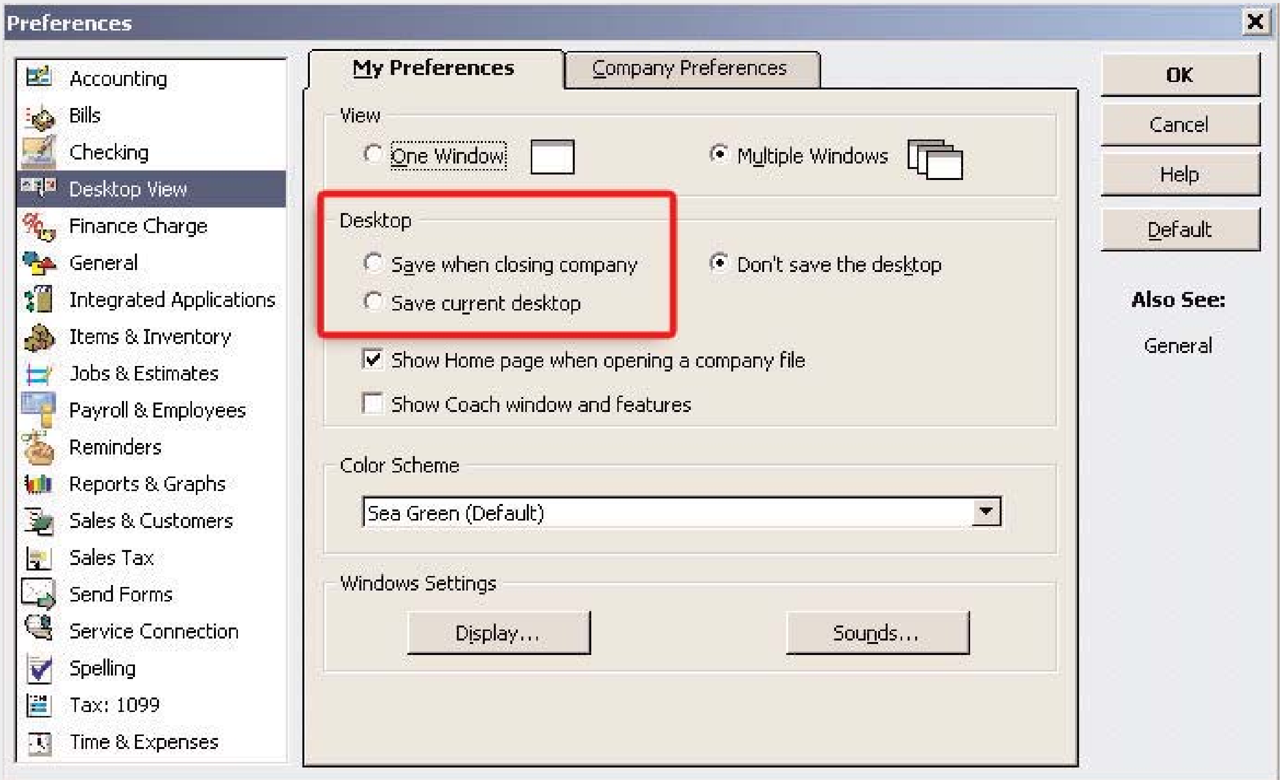
Desktop (continued)

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



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

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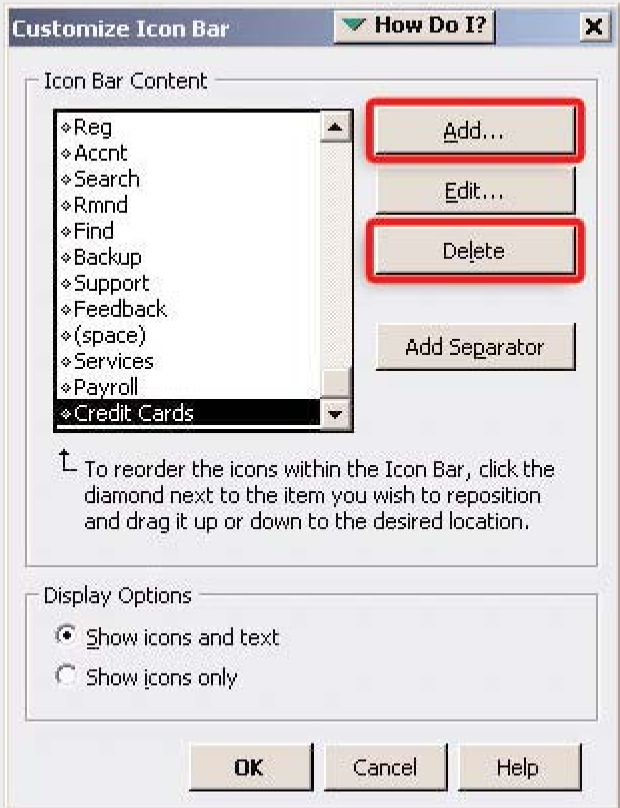
Icon Bar

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.)



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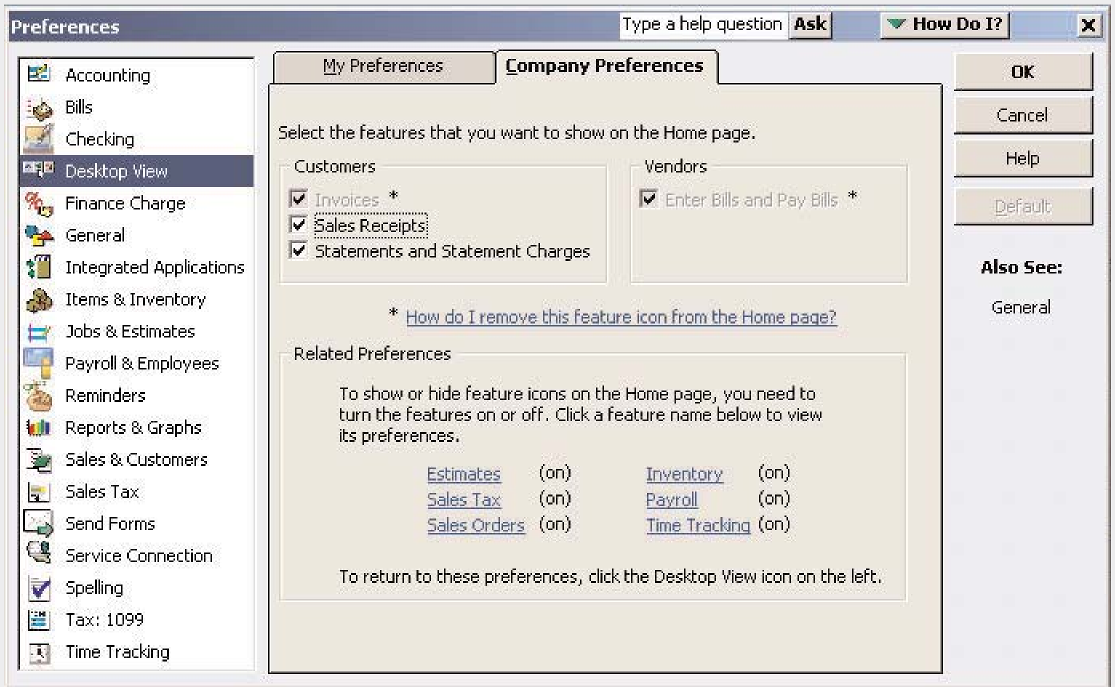
Home Page

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.)



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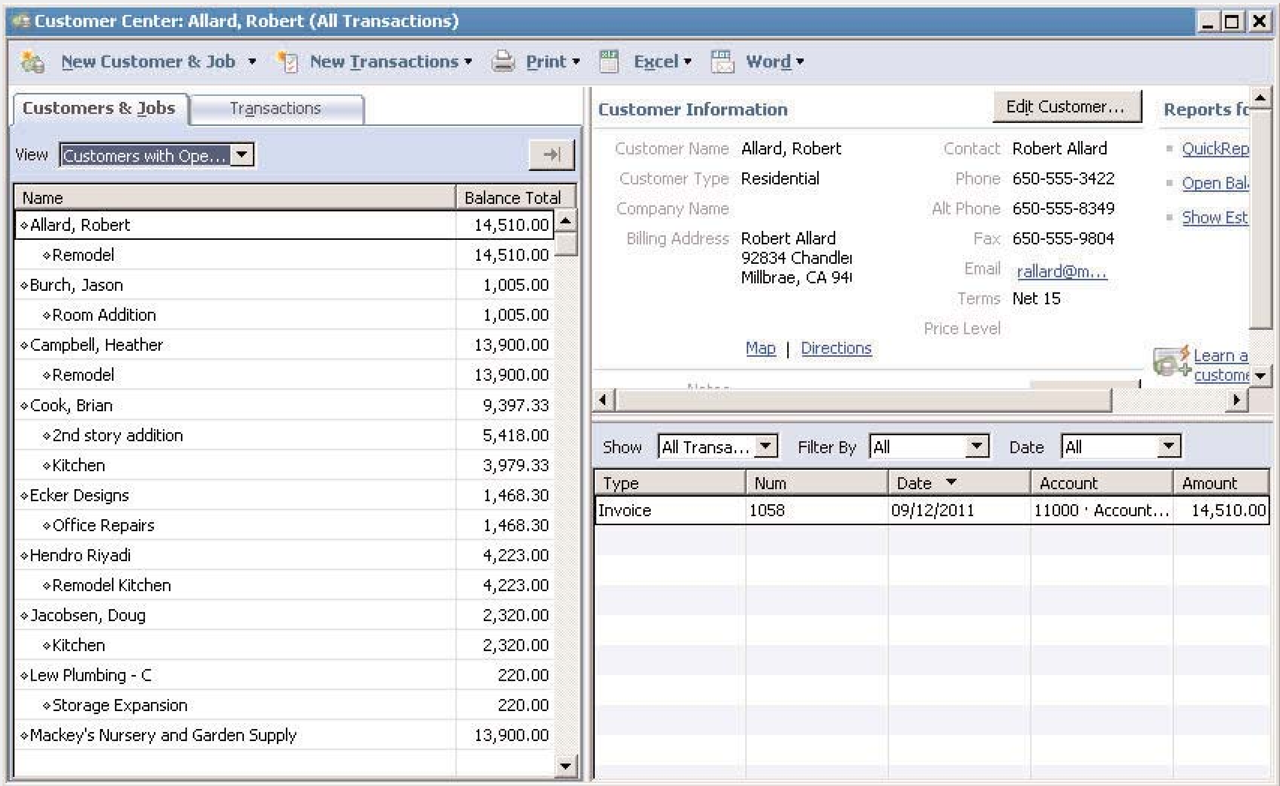
Data Centers

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).*



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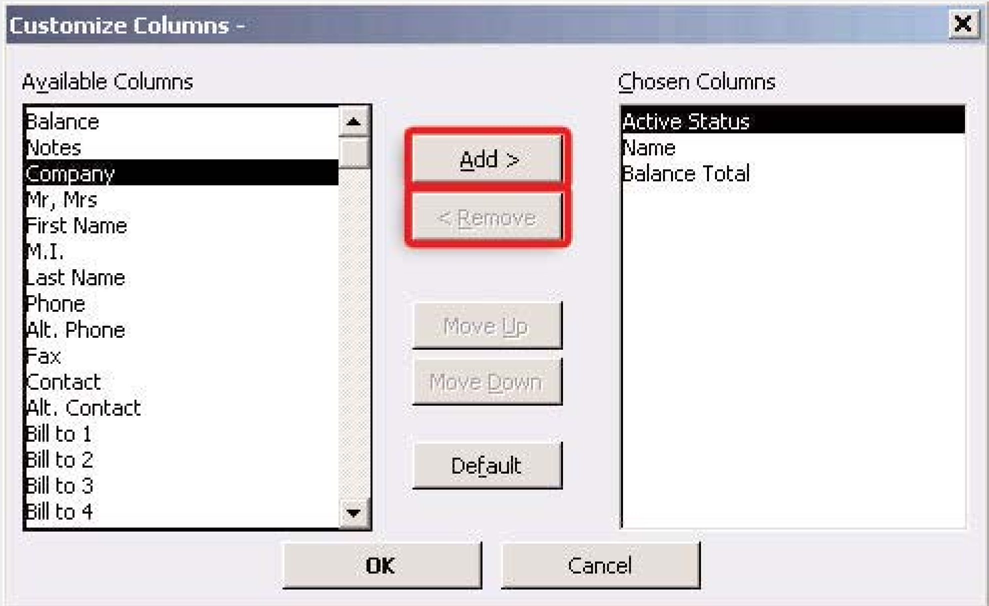
Data (continued)

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.**



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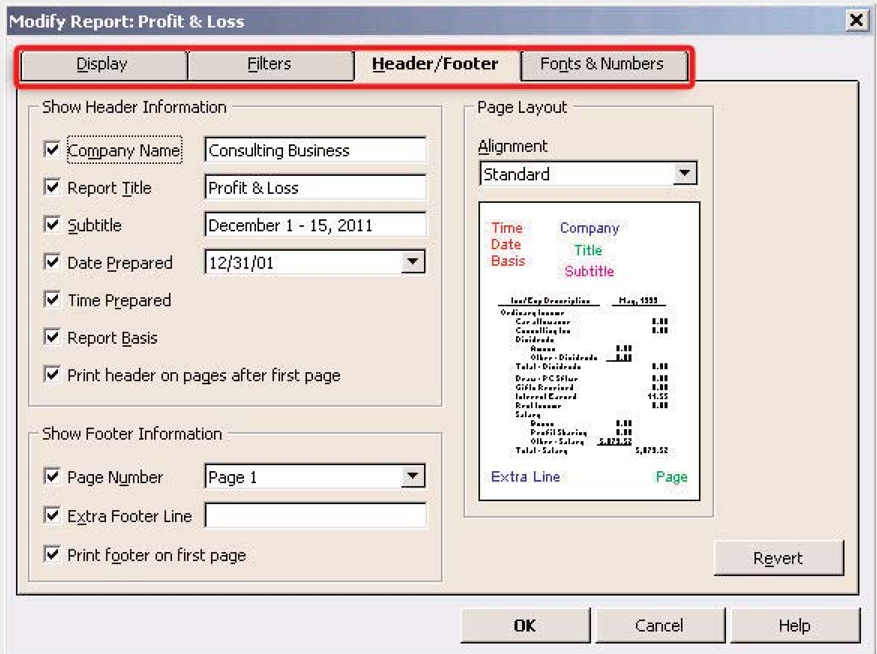
Report Formatting

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)

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.



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Report Formatting (continued)

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

	Design	Landscaping	Maintenance
Ordinary Income/Expense			
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.

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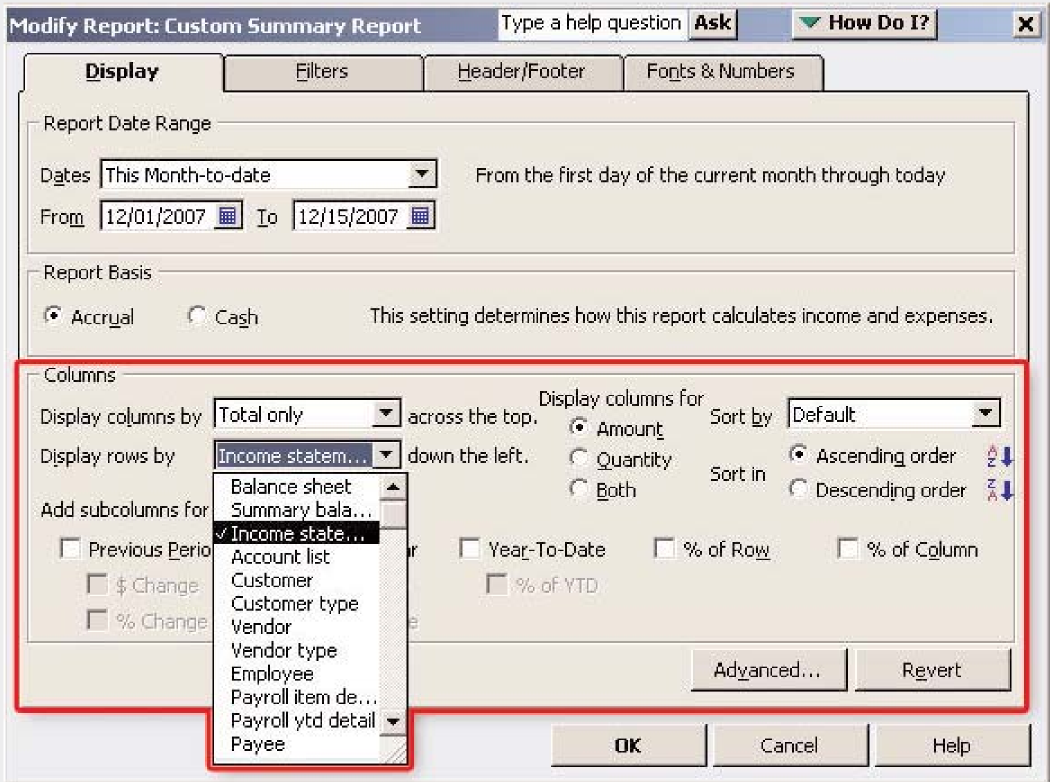
Reports

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**



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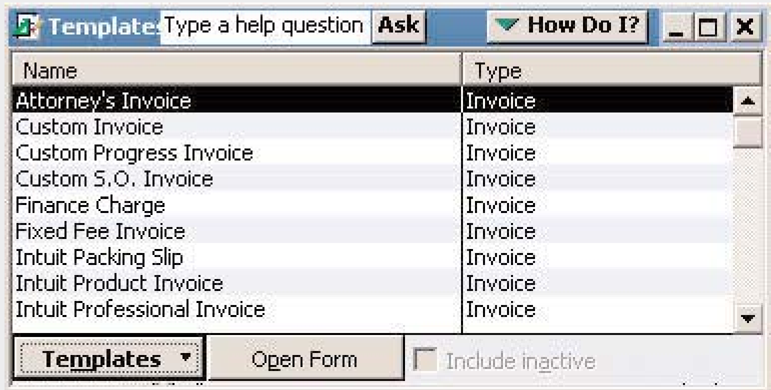
Forms

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.



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