

QB – Define Custom Fields

1.Steps to Define Custom Fields in Invoice:

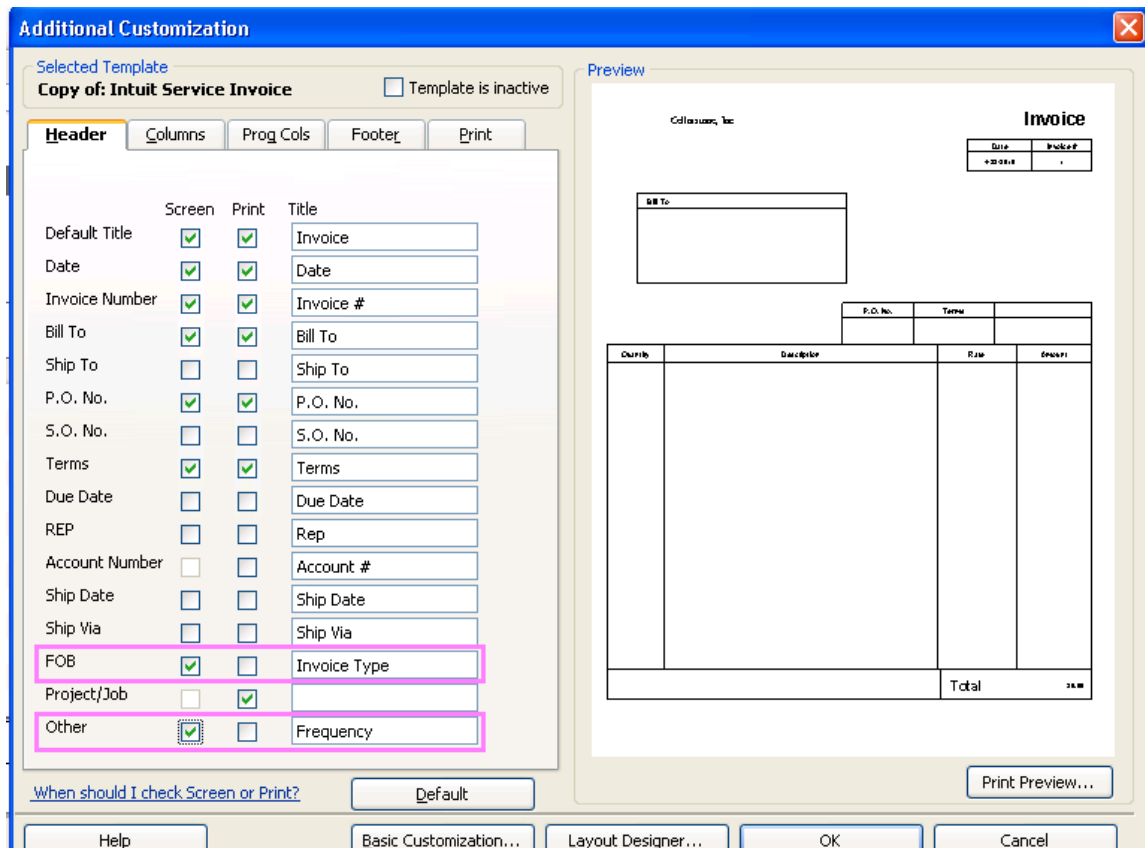
This document describes details about defining / enabling custom fields in QuickBooks desktop edition company files.

Redefine existing fields in invoice:

Invoice screen can be customized by clicking Customize – Customize Design and Layout.... menu, refer the following screen shot:



Invoice header & columns has standard fields & generic fields, standard fields have specific titles where as the generic fields has name as Other or Other 1, etc. You may rename the fields as your wish in the “Additional Customization” window and start using it appropriately. E.g. The requirement is to have a field to specify “Frequency“ & have another field to specify the “Invoice type” and to satisfy this requirement the “Other” field has been renamed as “Frequency“ and “FOB” field is renamed as “Invoice Type”, refer the following screen shot:



After redefining the fields the invoice header would look like as follows:

The screenshot shows the QuickBooks invoice header interface. At the top, there is a menu bar with options: Spelling, History, Journal, Letters, Customize, and Attach. Below the menu bar, there is a 'Template' dropdown menu and a 'Print Preview' button. A dropdown menu shows 'Copy of: Intuit Service'. The main header area contains two fields: 'Date' with the value '04/22/2010' and a calendar icon, and 'Invoice #' with the value '1'. Below these fields, there is a table with four columns: 'P.O. No.', 'Terms', 'Invoice Type', and 'Frequency'. The 'Invoice Type' and 'Frequency' columns are highlighted with a pink border.

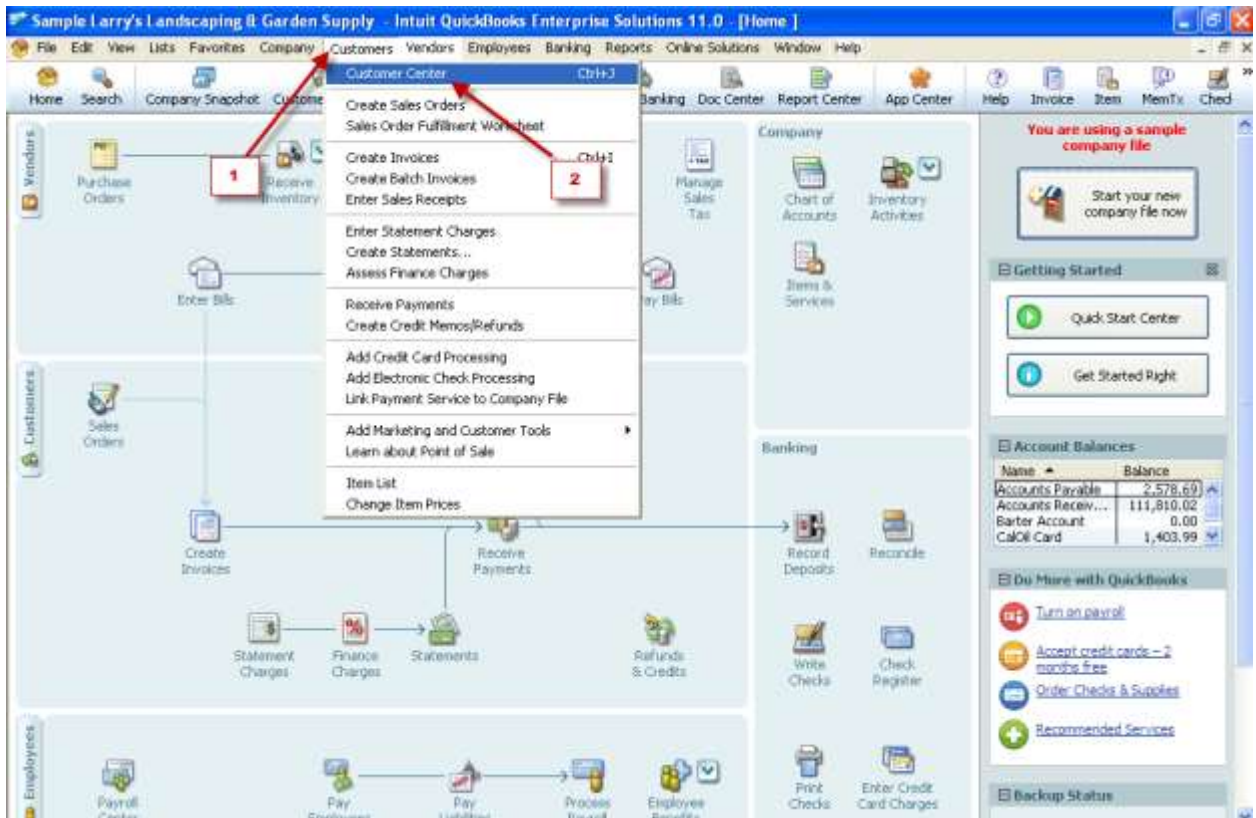
The same way the invoice columns can be redefined. If all the existing fields are already used and need new fields in invoice header or column then refer the details in following section.

2.Steps to Create Custom Fields and Enable it in Invoice:

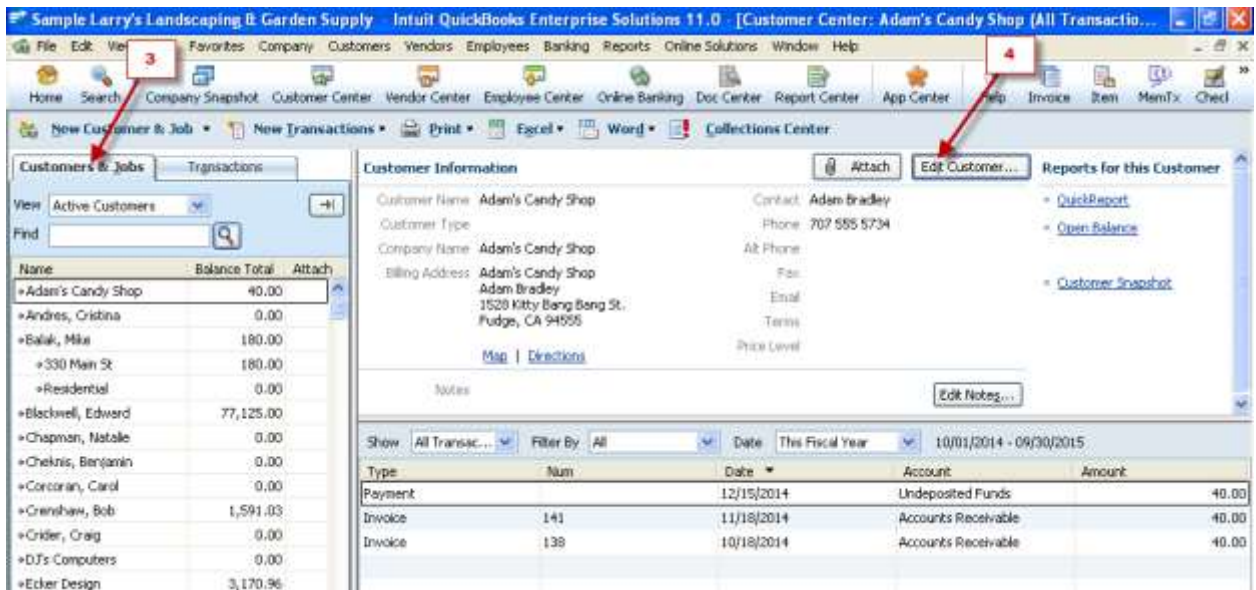
If new fields are required at invoice header level then custom fields can be created at Customer section and enable the fields in invoice header or if new fields are required at invoice columns then custom fields can be created at Item section and enable the fields in invoice columns. Then use the Customize – Customize Design and Layout.... Menu in Invoice to enable the fields in invoice section.

This section explains how to create custom fields and making the new fields appear in the Invoice screen in order to update the split percentages of the Sales Reps in the Invoice section in QuickBooks.

- Click Customers → Customer Center.



- Click the Customers & Jobs tab. Right-click any name on the list and then click Edit. Or else click the Edit Customer Button.



- It will Open the below page. Click the Additional Info tab.

Sample Larry's Landscaping & Garden Supply - Intuit QuickBooks Enterprise Solutions 11.0 [Edit Job]

File Edit View Lists Favorites Customers Vendors Employees Banking Reports Online Solutions Window Help

Home Search Company Snapshot Customer Center Vendor Center Employee Center Online Banking Doc Center Report Center App Center Help Invoice Item Memo Check

Job Name: Residential

Current Balance: 0.00 [How do I adjust the current balance?](#)

Address Info Additional Info Payment Info Job Info

Customer: Balak, Mike Contact: Mike Balak

Company Name: Phone: 415-555-6453

Mr./Ms./...: FAX: none

First Name: Mike M.I. Alt. Phone: 415-555-6453

Last Name: Balak Alt. Contact:

E-mail:

Cc:

Addresses

Bill To: Ship To:

Mike Balak
1800 Appleside Ct
Bayshore CA 94326

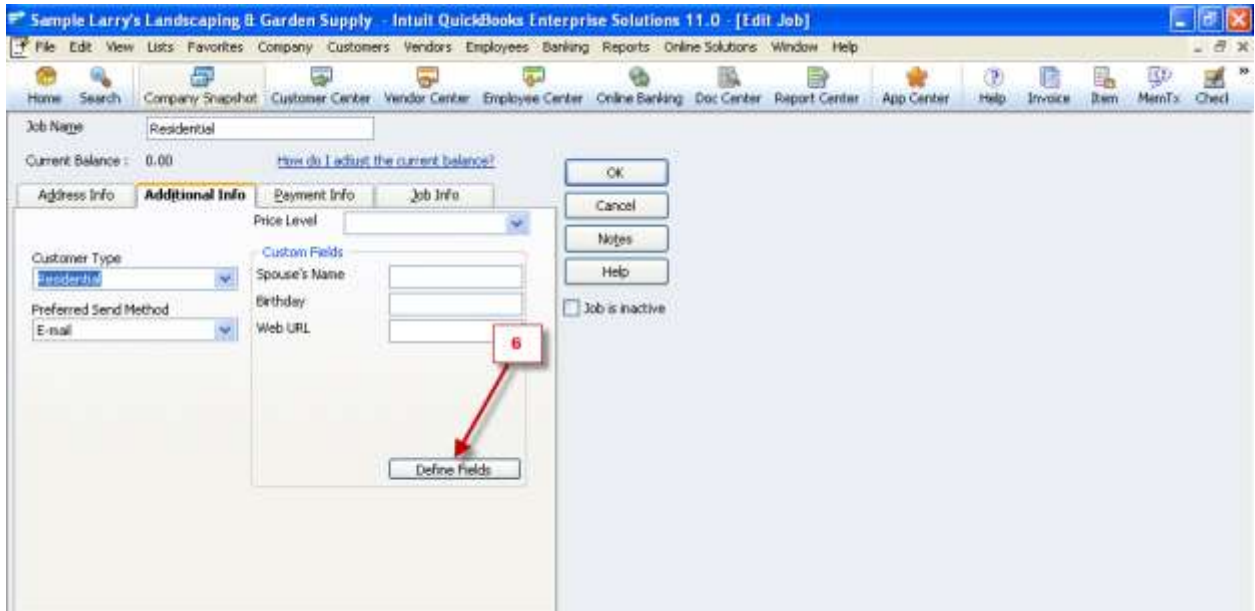
Copy >>

Edit Add New Edit Delete

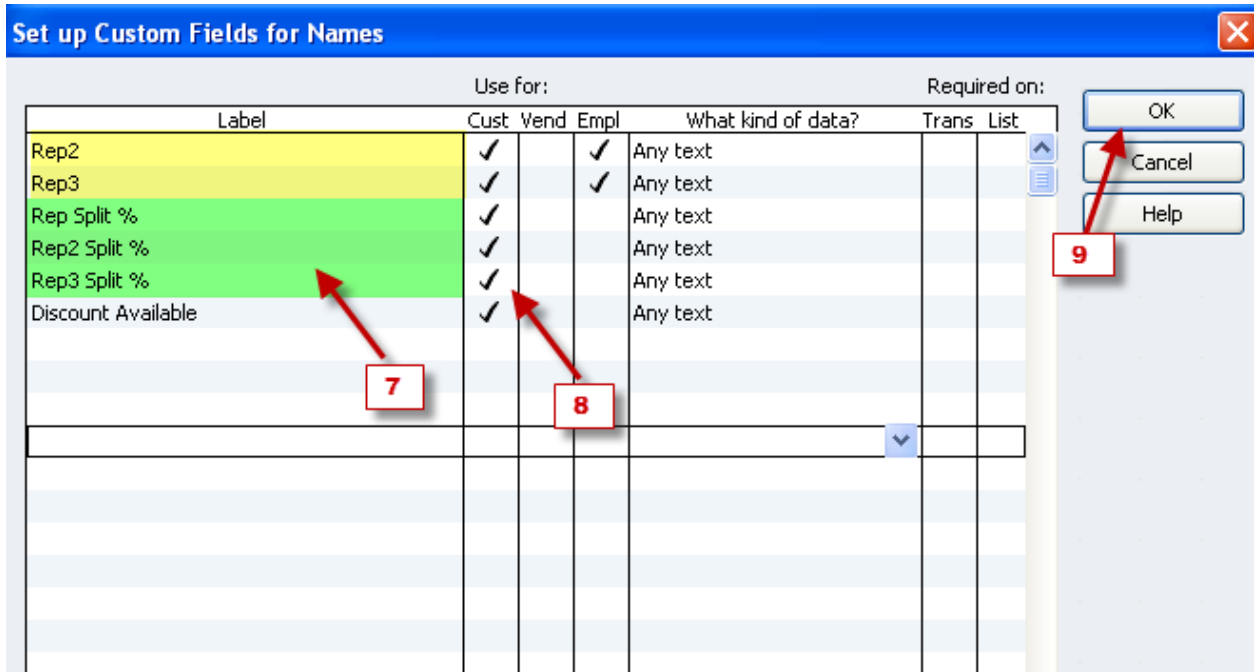
Default shipping address

OK Cancel Notes Help Job is inactive

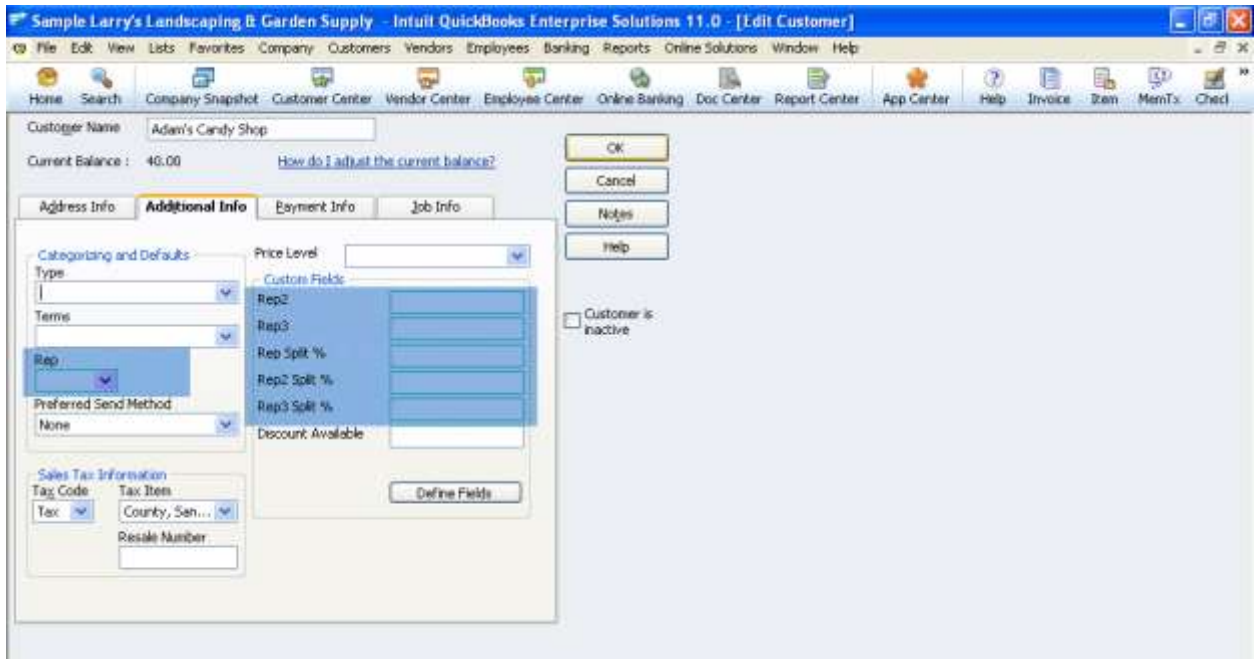
- Click Define Fields.



- It will open the below screen.
- For each field you want to add:
 - Enter the name of the field in the Label column.
 - Here The Reps name and their split % can be maintained.
 - Select the lists where you want the field to appear.(Customer, Vendor and Employee tables).
 - Click Ok.

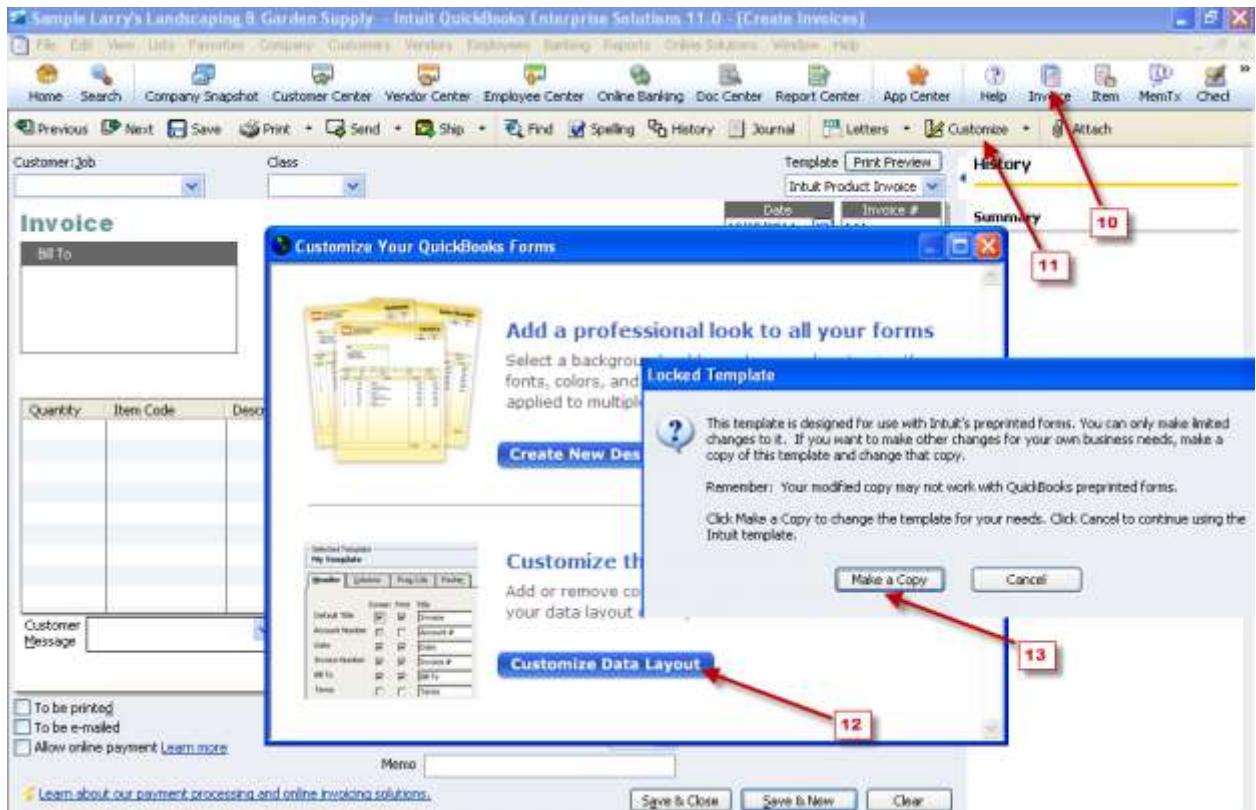


- The new fields will appear on the Additional Info tab.



- Follow the same steps as above if more splits needs to be added.

- Next go to the Invoice Screen. Click Customize. Then Click the Customize Data layout Button.
- Click Make a Copy.



- In the Header Tab, you will find all the fields created. Select all the checkbox corresponding to the particular new fields and click OK.

Additional Customization

Selected Template
Copy 4 : Intuit Product Invoice Template is inactive

Header Columns Prog Cols Footer Print

Bill To	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bill To
Ship To	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ship To
P.O. No.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	P.O. Number
S.O. No.	<input type="checkbox"/>	<input type="checkbox"/>	S.O. No.
Terms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Terms
Due Date	<input type="checkbox"/>	<input type="checkbox"/>	Due Date
REP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Rep
Account Number	<input type="checkbox"/>	<input type="checkbox"/>	Account #
Ship Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Ship
Ship Via	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Via
FOB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	F.O.B.
Project/Job	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Project
Other	<input type="checkbox"/>	<input type="checkbox"/>	
Rep2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rep2
Rep3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rep3
Rep Split %	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rep Split %
Rep2 Split %	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rep2 Split %
Rep3 Split %	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rep3 Split %
Discount	<input type="checkbox"/>	<input type="checkbox"/>	Discount Available

When should I check Screen or Print?

Preview

Larry's Landscaping & Garden Supply
 1045 Main Street
 Brisbane, CA 94026
 (415) 555-4567

Invoice

Date	Invoice #
01/13/14	148

Bill To: [] Ship To: []

P.O. Number	Terms	Ship	Ship	Via	S. O. No.	Project
			12/13/2014	UPS		
Quantity	Item Code	Description	Unit Price	Amount		
				Total	\$ 0.00	

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