

## [How to Define Custom Fields in QuickBooks®](#)

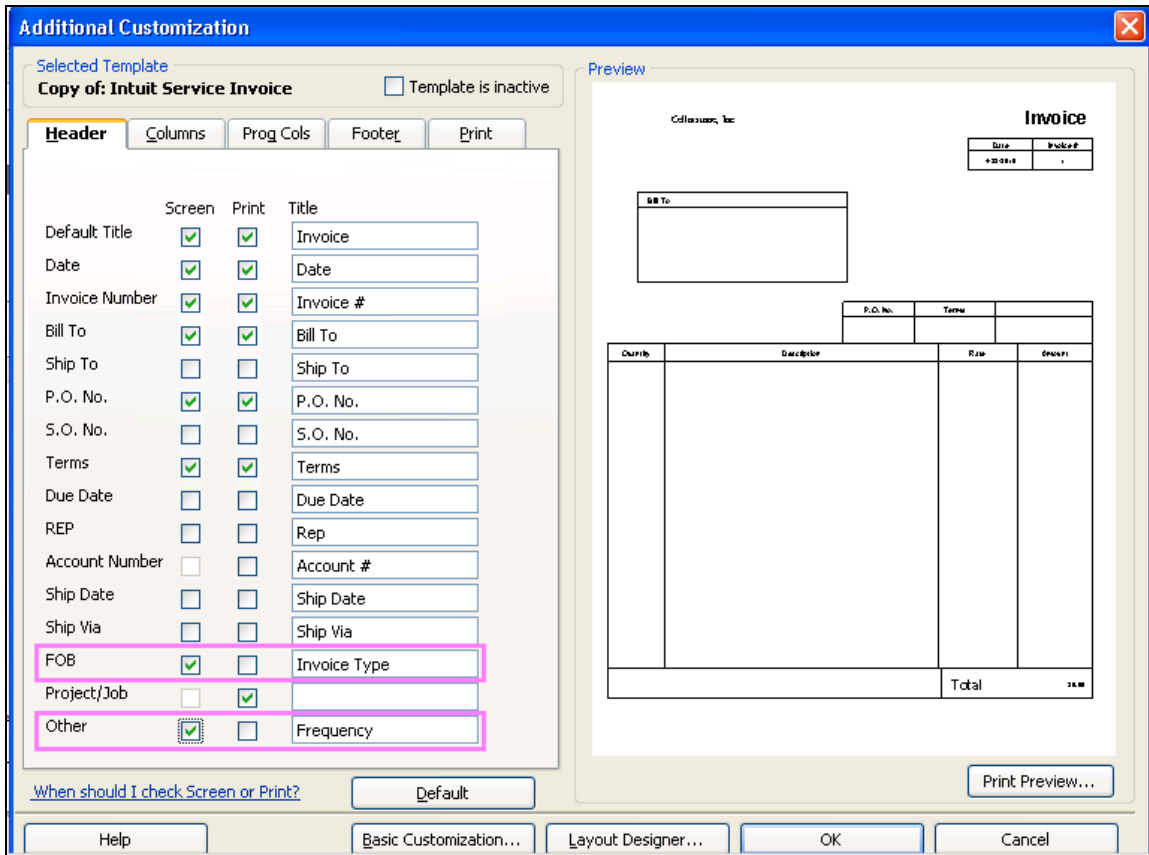
This document describes details about defining / enabling custom fields in QuickBooks® desktop edition company files.

### **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 a software interface for creating an invoice. At the top, there are menu items: Spelling, History, Journal, Letters, Customize, and Attach. Below these are buttons for 'Template' and 'Print Preview', and a dropdown menu showing 'Copy of: Intuit Service'. The main area contains a table with the following data:

Date	04/22/2010	Invoice #	1
P.O. No.		Invoice Type	
Terms		Frequency	

A pink rectangular box highlights the 'Invoice Type' and 'Frequency' columns in the second row of the table.

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.

**Define new fields for 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.

The screenshot shows a customer profile form with several tabs: Address Info, Additional Info (selected), Payment Info, and Job Info. The 'Additional Info' tab is active and contains the following fields:

- Customer Name: [Text Field]
- Opening Balance: [Text Field] as of 04/22/2010 [Calendar Icon] [How do I determine the opening balance?](#)
- Price Level: [Dropdown Menu]
- Customer is inactive:
- Resale No.: [Text Field]

Under the 'Categorizing and Defaults' section, there are dropdown menus for Type, Terms, Rep, and Preferred Send Method (set to None). A 'Custom Fields' section is present with a 'Define Fields' button highlighted by a pink dashed box.

The screenshot displays the main configuration window for a service item and a smaller 'Custom Fields for unnamed item' dialog box. In the main window, the 'Type' dropdown is set to 'Service'. The 'Item Name/Number' field is empty, and the 'Subitem of' dropdown is also empty. The 'Unit of Measure' section has an 'Enable...' button. A checkbox for 'This service is used in assemblies or is performed by a subcontractor or partner' is unchecked. The 'Description' field is empty, the 'Rate' is 0.00, and the 'Account' dropdown is empty. In the 'Custom Fields' dialog box, the 'Define Fields' button is highlighted with a red rectangle.

Use the Customize – Customize Design and Layout.... Menu in Invoice to enable the fields in invoice section.