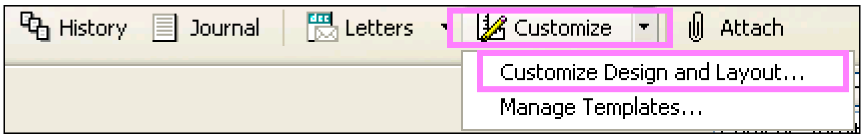
How to Define Custom Fields in QuickBooks®

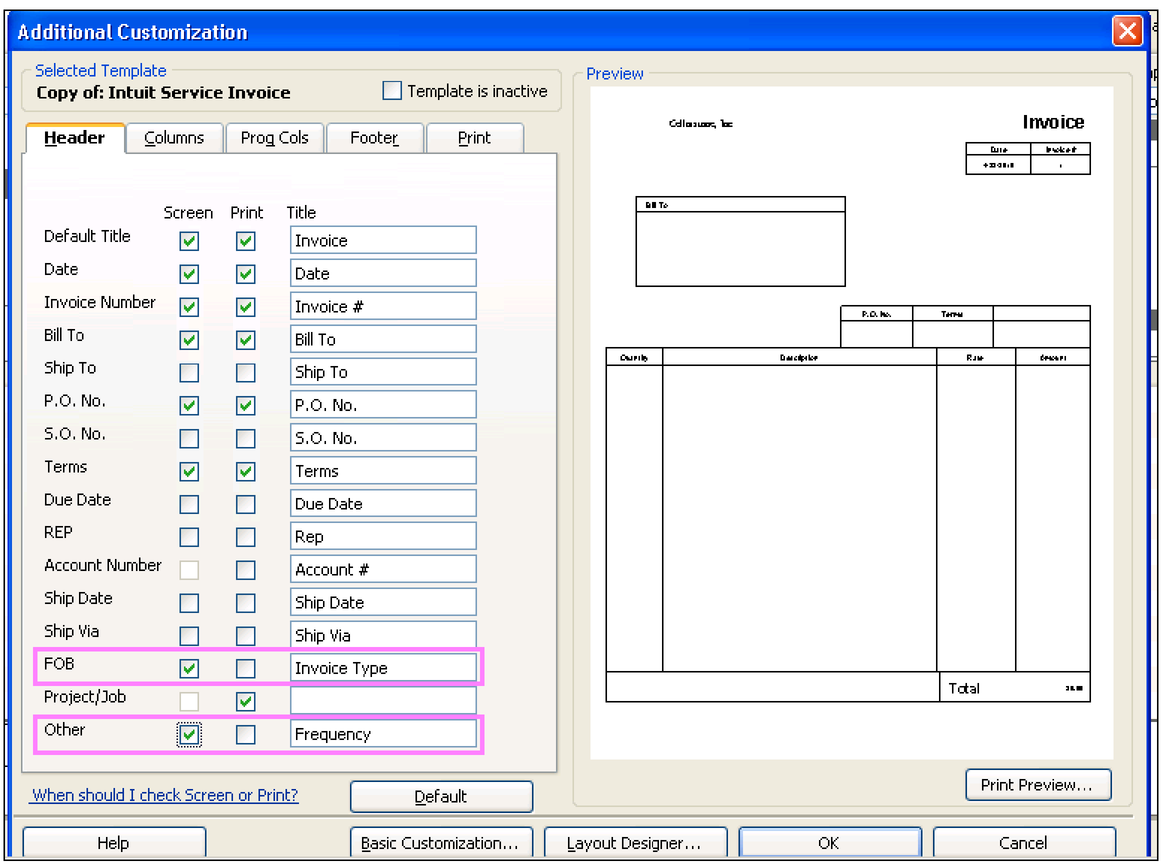
This document describes details about defining / enabling custom fields in QuickBooks® desktop edition company files.

Redefine existing fields in invoice:

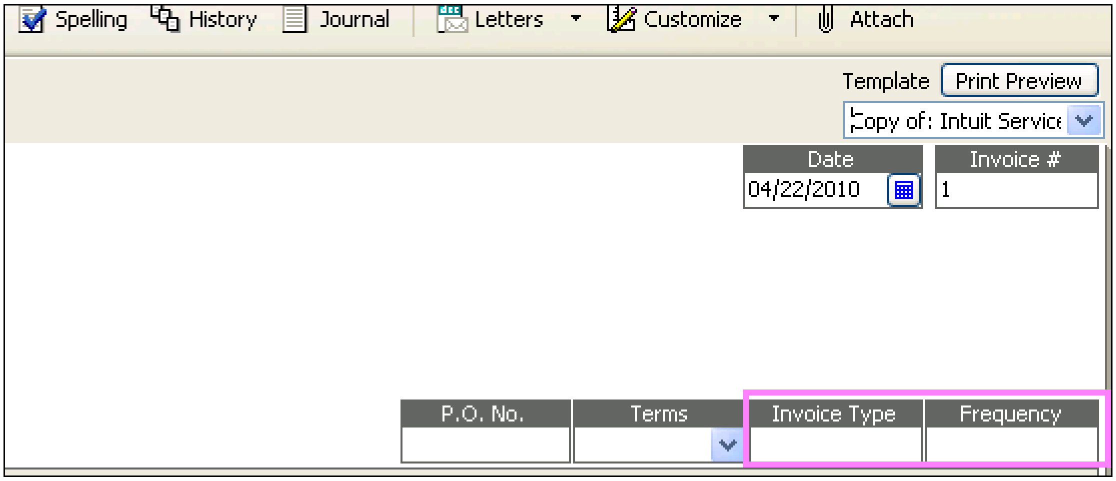
Invoice screen can be customized by clicking Customize – Customize Design and Layout…. menu, refer the following screen shot:



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:



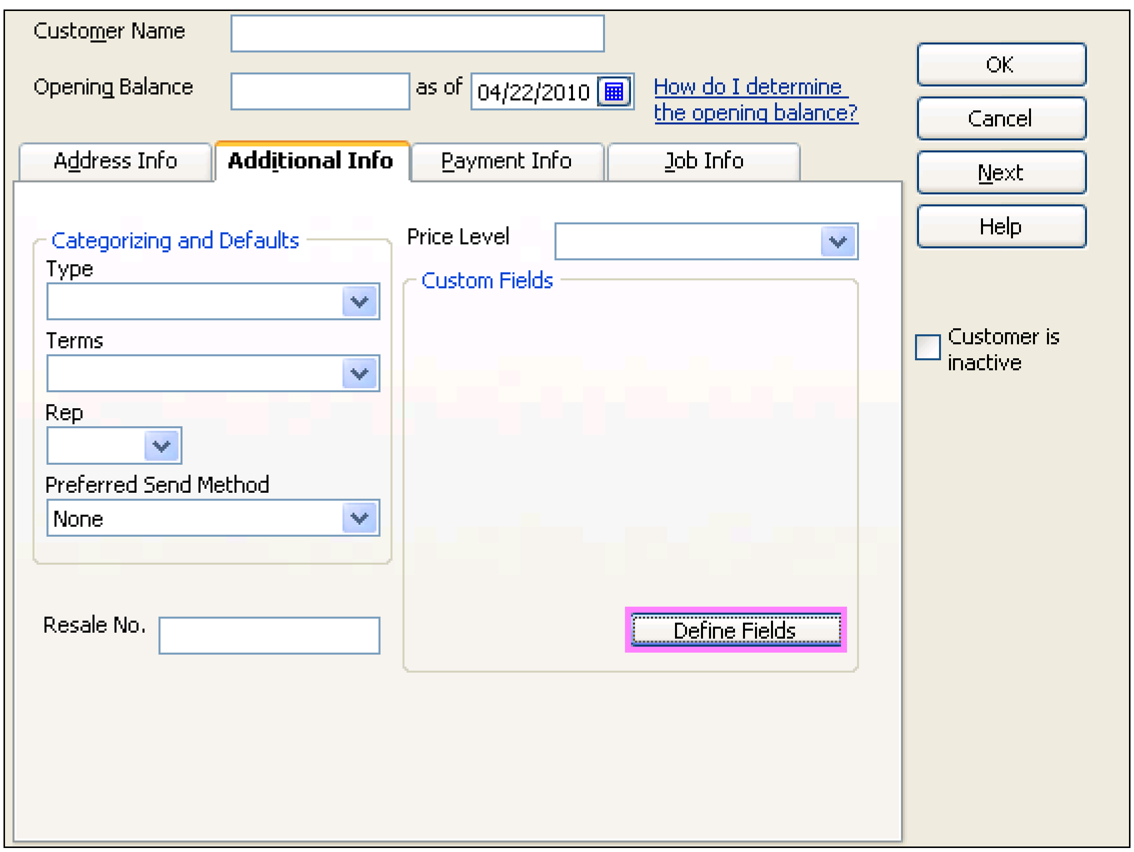
After redefining the fields the invoice header would looks like as follows:

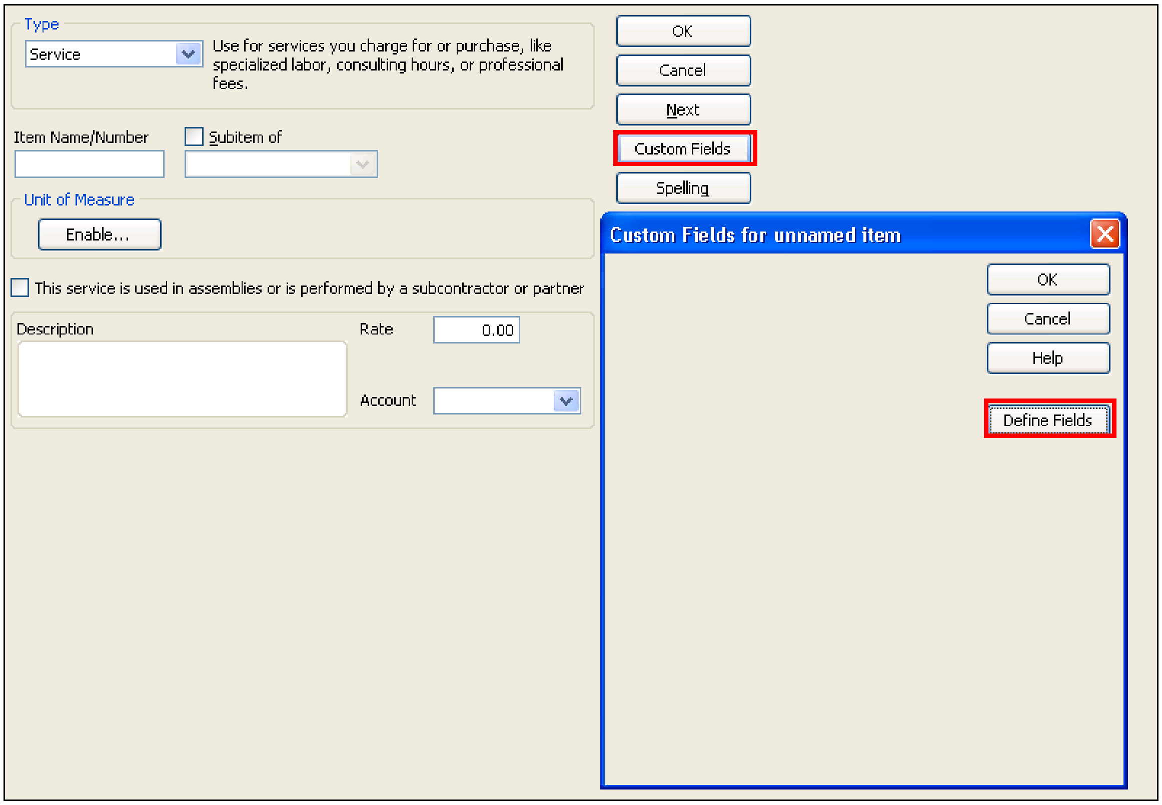


The same way the invoice columns can be redefined. If all the existing fields are already used and need new fields in invoice header or column then refer the details in following section.

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.





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