



January 2014

## Make QuickBooks Yours in 2014: Customize

*QuickBooks can be used as is (with some exceptions), but you can customize many elements to improve your workflow, your form output and your business insight.*

While many of the things you purchase and use in your daily work and professional lives don't come with options, many do. Think about the last time you bought a car, for example. Did you request additional features for safety or convenience or aesthetic value?

You can't buy "extras" with your copy of QuickBooks. You *can* select from the different versions (Pro, Premier, etc.) and extend the software's functionality by installing integrated add-ons from the Intuit App Center. But if you install QuickBooks on two machines from the same DVD or download, they'll look and work the same.

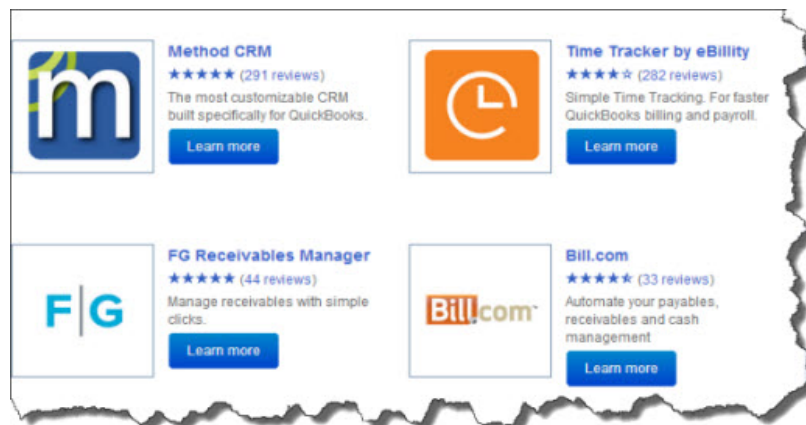


Figure 1: Need more functionality in areas like CRM or receivables? Talk to us about adding an integrated app.

That is, until you start customizing the product, which you *should* do. The customization options in QuickBooks let you:

- Change the appearance of your desktop

- Modify forms to include only needed content and to make them look professional and uniform, and
- Drill down deeply on your company data to isolate only the information that you want.

The benefits of customization are obvious. You'll accelerate your workflow, polish your image and get insight that helps you make critical business decisions.

## Your Desktop View

QuickBooks has always made your most commonly-used tools available on the home page. Intuit revamped this screen very skillfully starting with the 2013 versions, so it's much cleaner and less cramped. But if you don't use all of the functions represented by icons, you don't have to even see them.

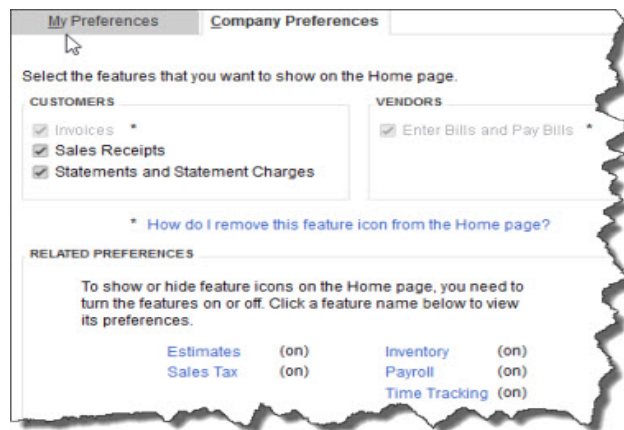


Figure 2: You can remove icons from the home page, but not if related features are enabled.

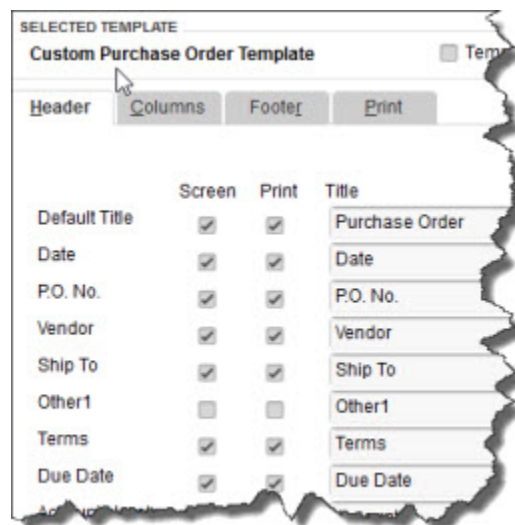
You can remove icons like **Estimates** and **Time Tracking** if you're not planning to use those functions, but some icons must remain if specific features are active. For example, if sales orders and estimates are enabled, invoices are automatically turned on. Likewise, if you're enabled **Inventory**, **Enter Bills** and **Pay Bills** are locked in, too.

There's an option to either limit the QuickBooks display to one window or let multiple windows open simultaneously. When you open QuickBooks, you can choose to have a specific set of windows open, the window or windows that were open when you shut down, or no windows.

## Your Forms

QuickBooks comes with pre-defined forms for transactions like purchase orders, invoices and sales receipts. If you don't like the look of one of these default *templates*, you can download one from the dozens of alternatives that QuickBooks supplies. You can alter these to better meet your needs – even creating multiple versions of the same type of form to use in different situations.

Columns and fields can be added, deleted, renamed and repositioned so that your forms contain only the information that your business requires. You can add your logo and change fonts and colors. Once you've settled on a design, you can apply it to multiple forms to present a unified image to your customers and vendors.



*Figure 3: You can specify which fields will appear – both onscreen and in print -- in your templates' headers, footers and columns.*

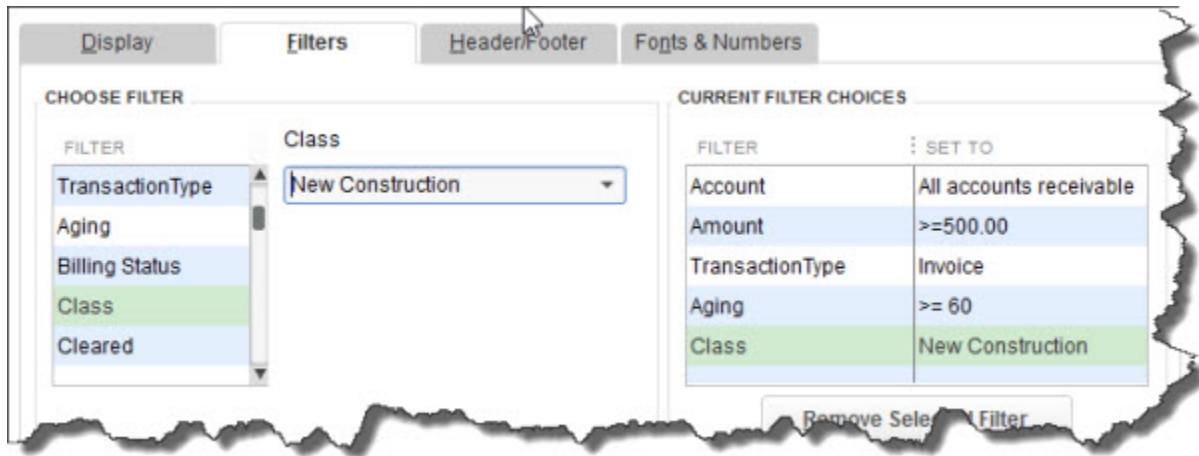
QuickBooks provides the tools to do all of this, but let us help you if you plan to do much modification. It can be challenging, especially if you have to use the **Layout Designer**.

## Your Reports

You already know that you can do simple modification of your reports, like changing the date range. You may even have clicked on **Customize Report** and altered the column structure of a report and its sort order.

But do you regularly click on the **Filters** tab in the **Modify Report** dialog box? If you're often frustrated because your reports cover too much ground or an inadequate, unfocused level of detail, you should be exploring the options offered here regularly. Filters restrict the data in a given report to a smaller, more targeted group of records or transactions, based on your needs.

For example, you might want to find out which customers in your New Construction class have outstanding balances (based on invoices) of more than \$500 that are more than 60 days old. You'd set up Filters to create this screen:



*Figure 4: You'll learn far more about your company's financial status if you use Filters in reports. We can help you set up the most effective ones for your business.*

Why not resolve to make your copy of QuickBooks *your* copy of QuickBooks in 2014? Some customization processes will require some upfront time, but once you get going, you'll wish you'd done this sooner.



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