Windows Administration - Feature #705

Add Custom Data Fields for Orders and Invoices in QuickBooks

12/03/2015 11:04 AM - Daniel Curtis

Status:	Closed	**Start date:**	12/03/2015
Priority:	Normal	**Due date:**	
Assignee:	Daniel Curtis	**% Done:**	100%
Category:	QuickBooks	**Estimated time:**	0.50 hour
Target version:	Windows 7	**Spent time:**	1.00 hour

Description

While setting up a custom template for a sales order in QuickBooks 2012, I found the default data fields were limited in selection and that I needed my own data fields for specific order templates. QuickBooks offers this ability, however it is not as intuitive as one might expect. This is a guide on how I managed to extra data fields to QuickBooks.

Create the Data Field

1. Once QuickBooks is open, click on the **Customer Center**.
2. Next select and **edit a customer**, any customer will work.
3. Then click on the **Additional Info** tab and click on **Define Fields**.
4. **Label** the new data field and select which group will be able to use the extra data field.
    - *Cust* will be available to members in the Customers group.
    - *Vend* will be available to members in the Vendors group.
    - *Empl* will be available to members in the Employees group.
5. Click **OK** when finished adding the new data field.
    - **Close** the customer edit window and Customer Center.

Use the Data Field

1. Open a new**Sales Order** or **Invoice**.
2. From the top menu in the order window, select Customize -> Manage Templates.
3. Select the template to add the new data field to.
4. Click on **Additional Customization...**
5. In the **Header** tab, locate the new data field name and check the Screen and Print boxes to add them to the invoice.
6. Click the **Layout Designer...** to adjust the layout and position of the new data field on documents printed using the template.
7. Click **OK** to apply changes in the Layout Designer, then click **OK** to finish editing the template.

Resources

- http://www.sleeter.com/blog/2013/11/custom-fields-in-quickbooks/

History

#1 - 12/03/2015 11:29 AM - Daniel Curtis

- Status changed from New to In Progress

- % Done changed from 0 to 50

#2 - 12/03/2015 11:31 AM - Daniel Curtis

- Description updated

#3 - 12/07/2015 10:00 AM - Daniel Curtis

- Status changed from In Progress to Resolved

- % Done changed from 50 to 100

#4 - 01/07/2016 04:18 PM - Daniel Curtis

- Category set to QuickBooks

#5 - 02/20/2016 07:15 PM - Daniel Curtis

- Status changed from Resolved to Closed