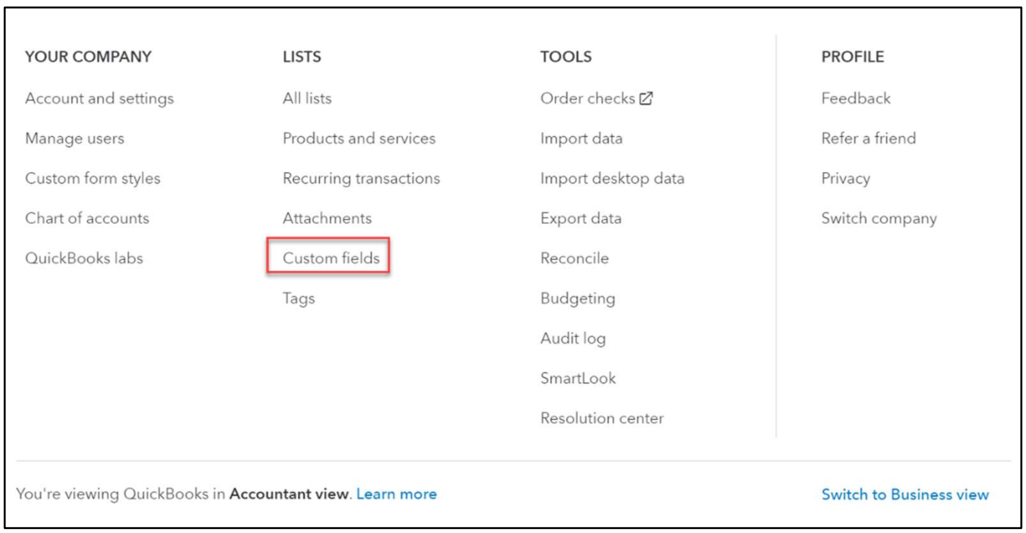
CREATING CUSTOM FIELDS

Although QBO provides many fields for tracking information, companies may need additional fields not currently built in to QBO.

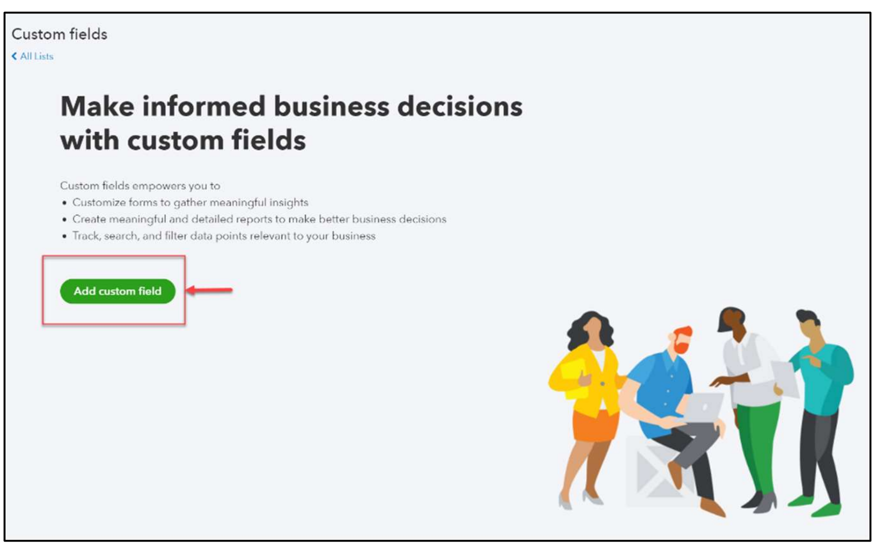
For example, a sales representative field on sales forms would be very useful for companies that pay commissions to their sales staff. A purchasing agent field on purchase orders might be useful for companies that want to track purchases made by various employees.

QBO allows users to add up to three custom fields for use in sales transactions and up to three custom fields for use in purchase orders. Custom fields are currently not available for use in bills, timesheets, or other transaction types.

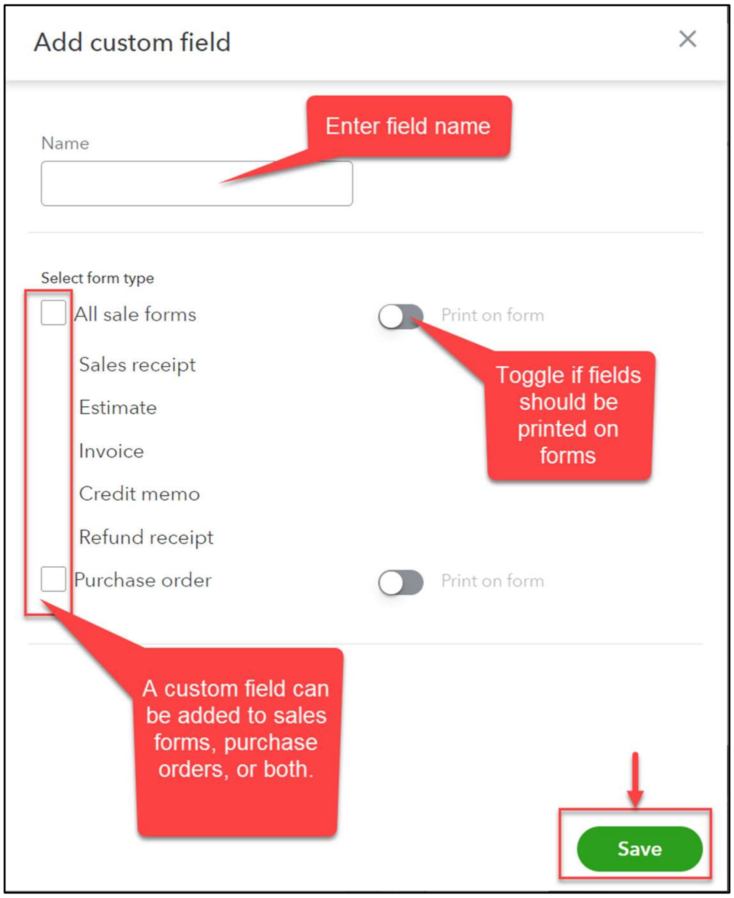
To set up new fields, click the icon.



Select **Custom fields**.



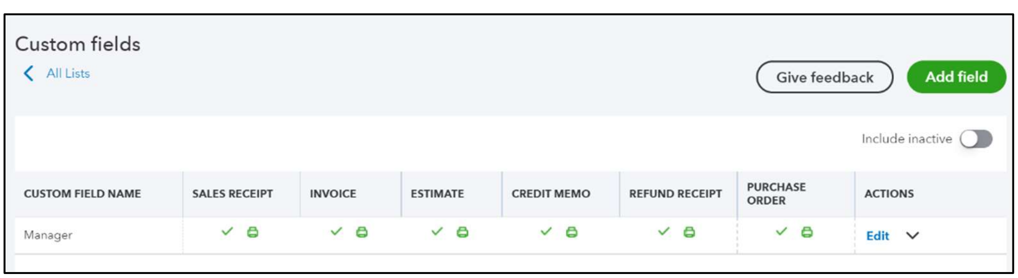
Click **Add custom field**.



In the **Add custom field** sidebar, the custom field's name is entered, and the form types and printing options are identified. If **Print on form** button is not toggled on, the field will only be visible to those creating or viewing the transaction in QBO.

Users can use the same custom field for both purchase orders and sales forms. For example, in a construction company, a project manager's name might be included on sales forms and purchase orders related to a specific customer or project. It might also be useful to have that manager's name appear on sales forms.

Click **Save**.



Once the new custom field is saved, it can be edited or made inactive by clicking **Custom fields** on the ⚙ icon menu and making a selection in the dropdown menu in the **ACTIONS** column. Custom fields also appear on the **All lists** menu.

✶ **HINT:** As of June 2021, **custom fields** could be **created** in the test drive company but were not visible in any forms. The fields will be functional in your homework company.

PRACTICE EXERCISE 11.3

Add some custom fields for Craig's Design and Landscaping.

(Craig wants to include the project manager initials as a custom field on invoices and the project manager and the purchasing agent initials as a custom field on purchase orders.)

1. Click the icon on the icon bar.
2. Click **Custom fields**.
3. Click **Add custom field**.
4. Enter "Project Manager" in the name field.
5. Check the boxes next to **All sale forms** and **Purchase order**.
6. Toggle both **Print on form** buttons.
7. Click **Save**.