


New Process for Creating Custom Fields

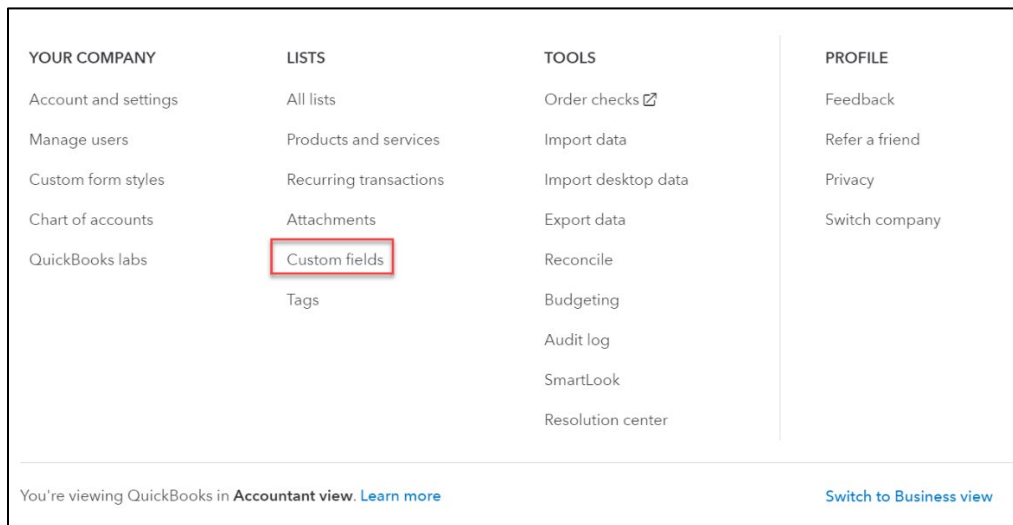
Chapter 11

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

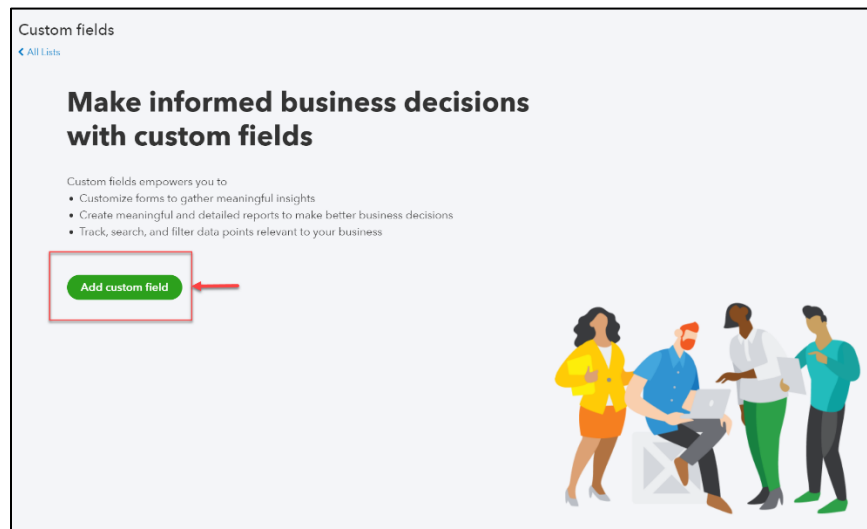
For example, a sales representative field on sales forms would be very useful for companies that pay commissions to their sales staff. A purchasing agent field on purchase orders might be helpful for companies that want to track purchases made by various employees.

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**.

The screenshot shows the 'Add custom field' sidebar. A red box highlights the 'Name' input field, with a callout bubble saying 'Enter field name'. Another red box highlights the 'Select form type' section, which includes checkboxes for 'All sale forms', 'Purchase order', and a list of other form types: 'Sales receipt', 'Estimate', 'Invoice', 'Credit memo', and 'Refund receipt'. A red box highlights the 'Print on form' toggle switch, with a callout bubble saying 'Toggle if fields should be printed on forms'. A red box highlights the 'Save' button at the bottom right, with a red arrow pointing to it. A red box also highlights the 'Purchase order' checkbox, with a callout bubble saying 'A custom field can be added to sales forms, purchase orders, or both.'


In the **Add custom field** sidebar, the custom field's name is entered, and the form types and printing options are identified. If the **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**.

The screenshot shows the 'Custom fields' table. The table has columns for 'CUSTOM FIELD NAME', 'SALES RECEIPT', 'INVOICE', 'ESTIMATE', 'CREDIT MEMO', 'REFUND RECEIPT', 'PURCHASE ORDER', and 'ACTIONS'. The 'Manager' field is listed in the 'CUSTOM FIELD NAME' column. The 'SALES RECEIPT', 'INVOICE', 'ESTIMATE', 'CREDIT MEMO', 'REFUND RECEIPT', and 'PURCHASE ORDER' columns all show a green checkmark and a green trash icon, indicating the field is active and can be deleted. The 'ACTIONS' column shows an 'Edit' link and a dropdown arrow. There are also buttons for 'Give feedback' and 'Add field' at the top right, and an 'Include inactive' toggle switch.

CUSTOM FIELD NAME	SALES RECEIPT	INVOICE	ESTIMATE	CREDIT MEMO	REFUND RECEIPT	PURCHASE ORDER	ACTIONS
Manager	✓ 🗑️	✓ 🗑️	✓ 🗑️	✓ 🗑️	✓ 🗑️	✓ 🗑️	Edit ▼


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**.