



RC ACTIVITIES, INC.

TIP OF THE MONTH OCTOBER 2019

MAKE REQUIRED CUSTOM FIELDS IN QBE

Did you know that you can make custom fields required in QuickBooks Desktop Enterprise?

Here's how. If you ever find the need to have a required custom field in QuickBooks Desktop Enterprise for a Customer, Vendor, Employee, or any of your Items, you can do so by adding 1 of 30 header custom fields and 1 of 15 custom item (column) custom fields.

For Items:

- Edit or create a new item
- Click on Custom Fields on the right side of the item window
- Click on Define Fields
- Create the label you want to require
- Select what type of field you want this to be, (Date, Phone Number, Drop Down List, Dollar Amount)
- Click on "Required for List and/or Transaction"
- Click on OK

For Customers, Vendors, and Employees

- Edit or create a new Customers, Vendors, or Employees
- Click on the Additional Info tab
- Click on Define Fields
- Create the label you want to require
- Select what type of field you want this to be, (Date, Phone Number, Drop Down List, Dollar Amount)
- Click on "Required for List and/or Transaction"
- Click on OK

If you want these fields to be added to reports, don't forget to also add them to your templates!

Add custom item fields to a sales forms

1. Create a new sales form, like an Invoice or Sales Receipt.
2. Select the Formatting tab and then Customize Data Layout. If you are working in a locked template, select Make a Copy.
3. In the window, select the tab for the section of the form you want to add your custom field to.
4. Find your custom item field on the list. Select the Screen or Print boxes to add it.

Additional Customization ✕

SELECTED TEMPLATE
Custom Sales Receipt Template is inactive

Header | Columns | Footer | Print

	Screen	Print	Title
Default Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sales Receipt
Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date
Sale Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sale No.
Sold To	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Sold To
Ship To	<input type="checkbox"/>	<input type="checkbox"/>	Ship To
Check Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Check No.
Payment Method	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Payment Method
Due Date	<input type="checkbox"/>	<input type="checkbox"/>	Due Date
REP	<input type="checkbox"/>	<input type="checkbox"/>	Rep
Account Number	<input type="checkbox"/>	<input type="checkbox"/>	Account #
Ship Date	<input type="checkbox"/>	<input type="checkbox"/>	Ship Date
Ship Via	<input type="checkbox"/>	<input type="checkbox"/>	Ship Via
FOB	<input type="checkbox"/>	<input type="checkbox"/>	FOB
Project/Job	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Project
Other	<input type="checkbox"/>	<input type="checkbox"/>	Other
Salesforce	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce Number

When should I check Screen or Print? Default

PREVIEW

R/C Activities, Inc. - TEST
30 Mansell Ct
Suite 103
GA 30076

Sales Receipt

Date	Sale No.
9/1/2019	10

Sold To
 15 Mayfield Dr.
 Columbia City, IL 60009

Description	Qty	Rate	Amount	Check No.	Payment Method	Project
			Total	2000		

Print Preview...

Help
Basic Customization...
Layout Designer...
OK
Cancel

Note: Adding a field may affect the layout of your form. If you need to, here's how to [adjust the layout](#).

5. When you're done, select **OK**.