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

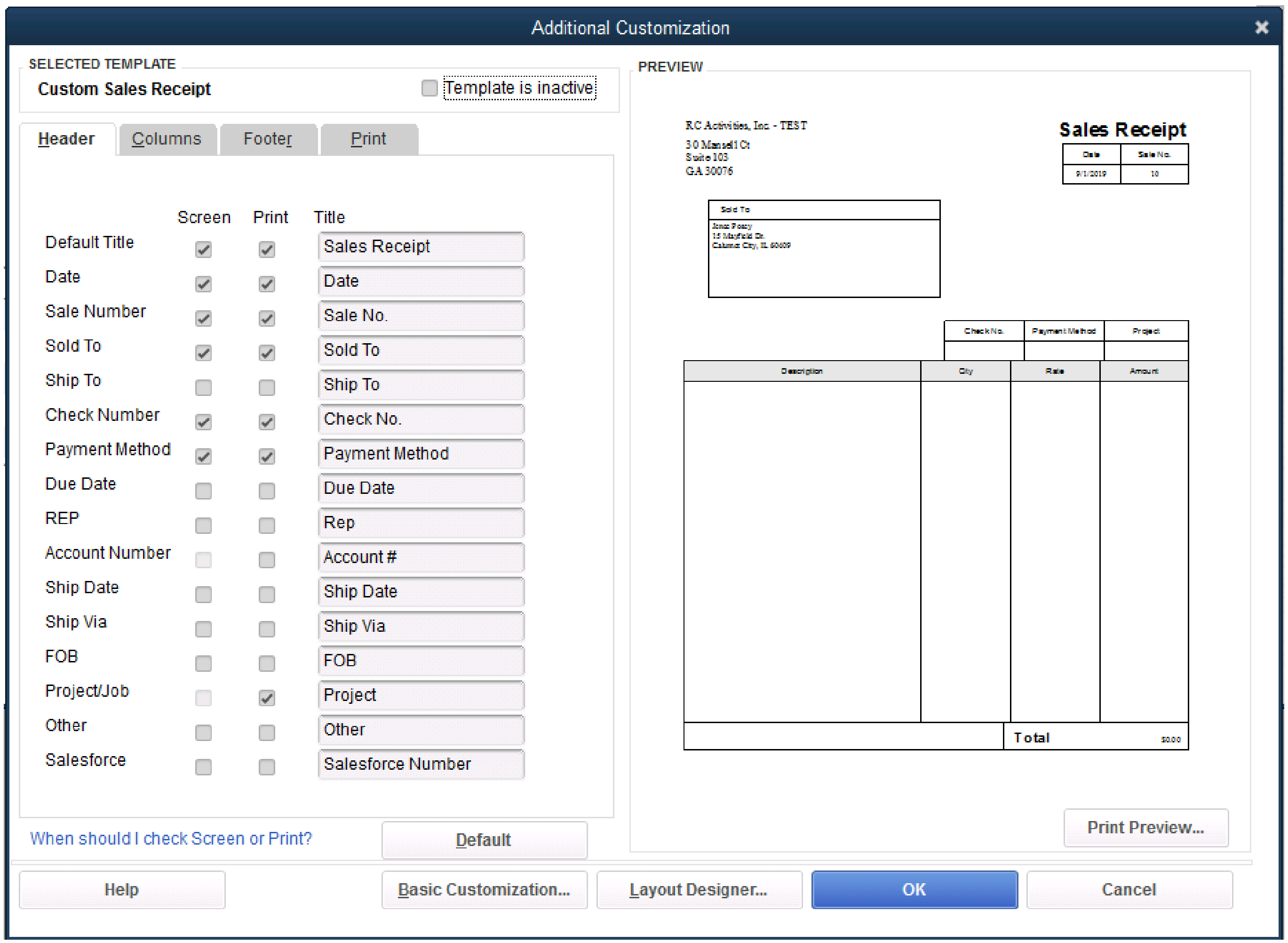
For Customers, Vendors, and Employees

- 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.



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.**