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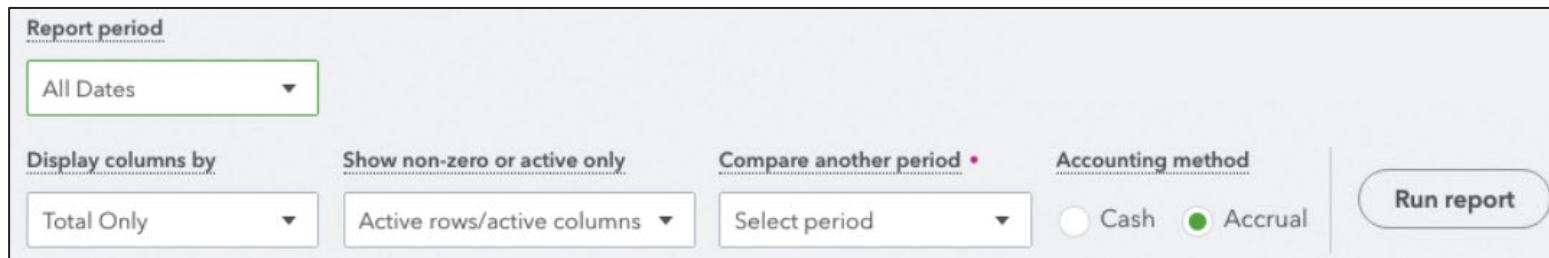
Customizing, Fine-Tuning, and Extending Capabilities

Learning Objectives

- Customize reports
- Save and send customized reports
- Add custom fields to sales forms
- Enable Privacy mode
- Set user permissions
- Use keyboard shortcuts
- Search for QuickBooks apps

Customizing Reports

- Customize built-in reports to suit your business
- Nine categories of predefined reports
 - All can be customized 



The screenshot shows a report customization interface with the following elements:

- Report period:** A dropdown menu currently set to "All Dates".
- Display columns by:** A dropdown menu currently set to "Total Only".
- Show non-zero or active only:** A dropdown menu currently set to "Active rows/active columns".
- Compare another period:** A dropdown menu currently set to "Select period".
- Accounting method:** Two radio buttons, "Cash" (unselected) and "Accrual" (selected).
- Run report:** A button to execute the report.

- Save your customized reports for use again and again


Sending Reports

- Use QBO to email reports
 - To your distribution list
 - Automatically on a set schedule or on-demand
- Can be exported in PDF or Excel format
- Can also be exported to Google Sheets (in QBO Advanced)

Adding a Custom Field to Sales Forms / QuickBooks Payments

- Customize Sales forms
 - Business name
 - Sales associate name
 - Order number
 - More!
- Up to three custom fields permitted on each type of Sales form
- Payment features
 - Accept customer payments “on the go” via ACH transfer or debit/credit card
 - Payments automatically matched to invoice being paid

Protecting Confidential Information

- Set user permissions
 - Control unauthorized data access
- Use Privacy mode to hide sensitive information on the Dashboards
- Levels of access / Manage Users feature 
 - Regular users with limited access
 - Administrators with complete access
 - Reports-only users
 - Time-tracking users
 - Accountants

Keyboard Shortcuts

You're viewing QuickBooks in **Accountant view**

Your Company ID is **4620 8163 6535 2574 320**

 Copy

Keyboard Shortcuts

To use a shortcut, press and hold **ctrl/control** and **alt/option** at the same time. Then press one of the keys below.

On main pages, like the dashboard or customers

SHORTCUT KEY	ACTION
i	Invoice
w	Check
e	Estimate
x	Expense
r	Receive payment
c	Customers
v	Vendors
a	Chart of accounts
l	Lists
h	Help
f	Global search
d	Focus the left menu
? or /	This dialog

On transactions, like an invoice or expense

SHORTCUT KEY	ACTION
x	Exit transaction view
c	Cancel out
s	Save and new
d	Save and close
m	Save and send
p	Print
? or /	This dialog

Extending Capabilities with Apps

- 300+ apps currently available
 - Plug-ins help you manage your business (inventory management, merchant processing, etc.)
 - Tools that help you integrate/sync data with QBO
 - An app that allows you to create sales receipts and take credit card payments
- App store
 - Go to: quickbooks.intuit.com/apps/apps/home
 - Or use the Apps link on the Navigation bar

TIP! *The test drive sample does not have an Apps link on the Navigation bar.*