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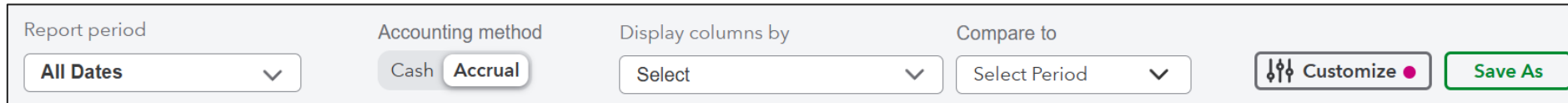
Customizing, Fine-Tuning, and Extending Capabilities

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 integrations

Customizing Reports

- **NEW!** Customization features are more advanced in the modern view of reports
 - Can edit dates and accounting methods from drop-down menus
 - Tabs: View Options, Display, Compare, Filter, General Options
- Customize built-in reports to suit your business 
- Nine categories of predefined reports
 - All can be customized



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

- Report period:** A dropdown menu currently showing "All Dates".
- Accounting method:** Two tabs, "Cash" and "Accrual", with "Accrual" being the active tab.
- Display columns by:** A dropdown menu currently showing "Select".
- Compare to:** A dropdown menu currently showing "Select Period".
- Customize:** A button with a settings icon and the text "Customize".
- Save As:** A green button with the text "Save As".

- Save your customized reports for use again and again

Customizing Reports (cont.)

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 Home page
- Levels of access / Manage Users feature 
 - Regular users with limited access
 - Administrators with complete access
 - Reports-only users
 - Time-tracking users
 - Accountants

Keyboard Shortcuts

Additional information

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

Your Company ID is **9341 4552 8093 7643**

 **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 clients

SHORTCUT KEY	ACTION
i	Invoice
w	Check
e	Estimate
x	Expense
r	Receive payment
j	Journal entry
c	Clients
u	Run payroll
v	Vendors
a	Chart of accounts
l	Lists
h	Help
f	Global search
d	Focus the left menu
k	Banking
`	Homepage
ctrl/cmd + .	Full screen mode
? or /	This dialog
Enter	Register
g	CC Credit
n	Sales Receipt
o	Purchase Order
z	Reconcile
;	Transaction search
[	Credit memo
]	Vendor credit
\	Reclassify transactions

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
g	Open transaction history
y	Open transaction journal
n	Add a new transaction line
k	Delete selected transaction line
	Copy selected row(s)
	Cut selected row(s)
v	Paste selected row(s)
z	Undo

Extending Capabilities with Integrations

- 300+ integrations currently available
 - Plug-ins that 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
- Access third-party integrations at:
 - All Apps→Accounting→Integrations→Find Integrations, or
 - At the App store: quickbooks.intuit.com/apps/apps/home

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