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QuickBooks® Tip – Custom Fields for Employees

Custom fields are used to add information that isn't already tracked when you setup your customers, vendors, employees, and items.

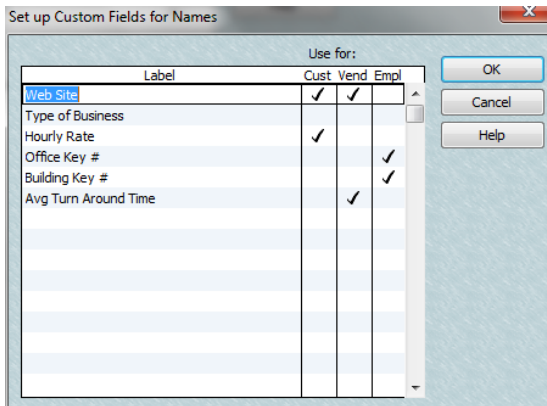
You can add up to seven custom fields to each Customer list, Vendors list, or Employee list. Overlapping custom fields count as one field on each list. For example if you add the custom field called Birthday on your Vendors and Customers lists, you can still add six other fields to each of those lists.

Examples of Custom fields for Employees are shown below: These fields will track the number of the key assigned to an Employee for their office and/or for your office building.

To begin, select Employee Center, you can add defined fields to new or existing Employees by selecting the Change tabs: Personal Info from the pull-down menu, clicking on the Additional Information tab and clicking on the Define Fields button. On page 2 you will see the list that will be on the screen after you select the Define Fields button.

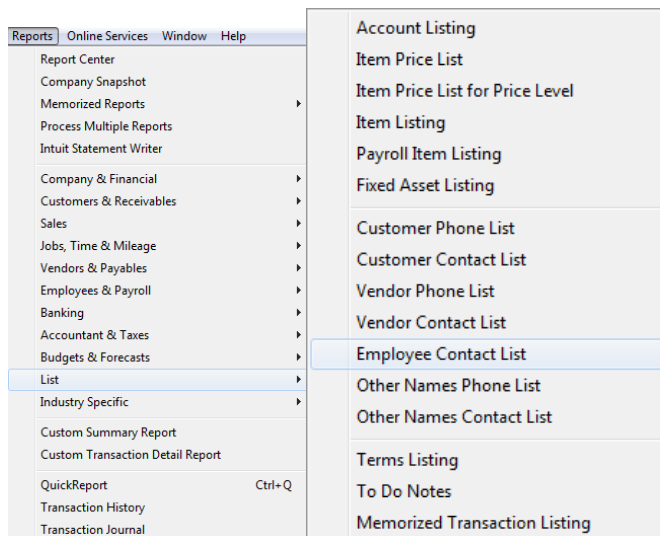
The screenshot shows the 'New Employee' form in QuickBooks. The 'Change tabs:' dropdown menu is set to 'Personal Info'. The 'Additional Info' tab is selected. The 'Define Fields' button is highlighted. Three red boxes with arrows point to these elements, labeled 'Step 1', 'Step 2', and 'Step 3' respectively.

These are the fields that are setup for this sample company. To set up a new Custom Field type your name in the Label column. Select which list you would like the Custom Field to appear in then click on OK. The new field(s) will appear on the Additional Info tab.

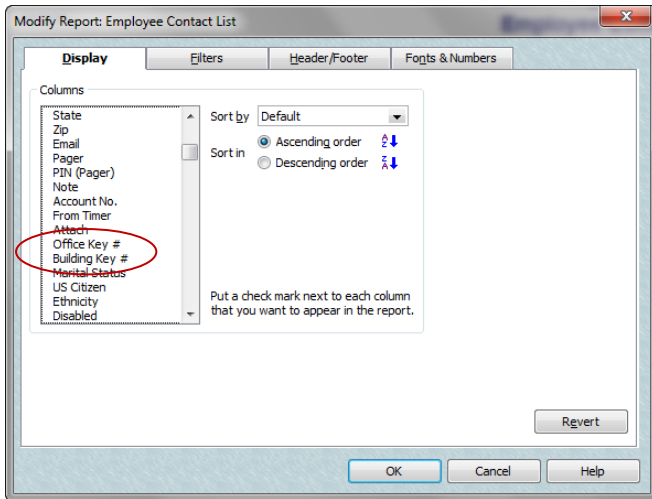


Once you have defined your custom fields you will be able to add those fields to your forms and reports.

To add the custom fields to an Employee report you will modify that report to include the custom field. In this example we are modifying the List report for Employees. Select the Reports Menu, List, Employee Contact List.



From the Modify Report screen you will see the Custom Fields you setup. To have a column on your report with the Custom Field, just click to select that field.



Shown below is a report with the Custom Fields added.

