



The QuickBooks™ Client Newsletter

Helping You Grow a Profitable Business with QuickBooks™ Software
From the office of:

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Make QuickBooks Yours: Customize the Desktop

Make QuickBooks work faster for you by changing a few settings.

Whether your business has been locked down because of the pandemic, or you are scrambling to hold things together with fewer employees or diminishing sales, you are probably leaning on QuickBooks more than ever.

You may be watching dwindling inventory items closely, monitoring your daily cash flow, or trying to collect on invoices that are not being paid because your customers are short on money.

QuickBooks can help with all these accounting tasks. But you certainly don't want to waste time now just dealing with the software's mechanics.

As always, we're available to help as you deal with the toll that COVID-19 is taking on your company. We'd also like to suggest that you spend a little time customizing QuickBooks. Streamlining its operations will take some of the unnecessary frustration out of your work life.

Getting Around Quickly

QuickBooks tries to accommodate different work styles and preferences by providing multiple navigation methods.

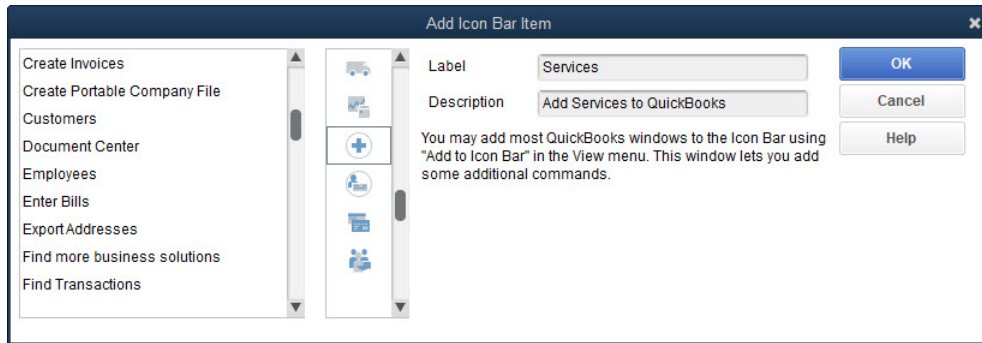
These are:

- The old, standard Windows menus.
- The home page's icons.
- The Icon Bar that appears in the left vertical pane by default (you change its position by opening the **View** menu).

If you are going to use the Icon Bar, we recommend that you set it up to make your most often-used tools prominent.

- To open the **Customize Icon Bar** window right-click in the toolbar and click on **Customize Shortcuts**.

- In the upper left corner, you will see a list of your icons as they are currently arranged.
- You can rearrange them by grabbing the small diamonds to their left with your mouse and dragging them to their new positions.
- You can change their labels by clicking **Edit**, or **Delete** them.



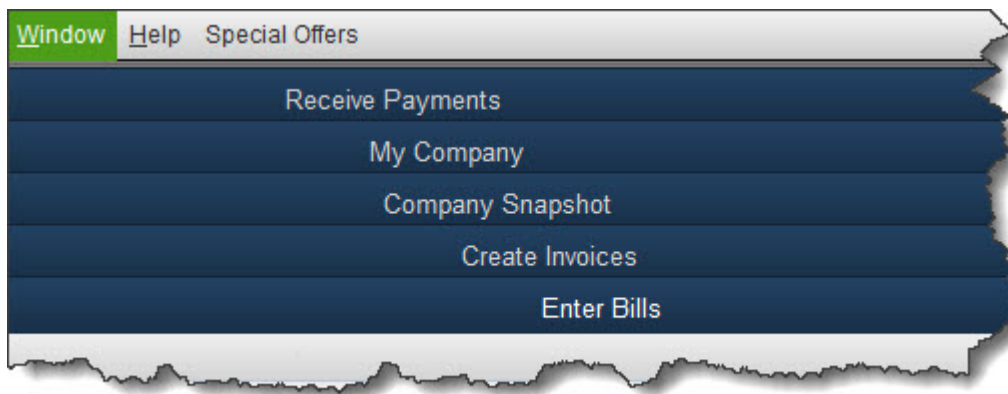
You can add almost any window in QuickBooks to your fast-access Icon Bar.

You are not limited to the items in the list. Click **Add**, and the **Add Icon Bar Item** opens, as pictured above. Click on any of the ones you want to include in the Icon Bar, then click **OK**. QuickBooks allows you to add almost any screen to your Icon Bar. Navigate to the window you want to add, then open the **View** menu and select **Add...to Icon Bar**. If you never use the Icon Bar, you can collapse it by clicking the small arrow to the right of the **Search** box at the top of the pane. You can also close the home page by clicking the lower of the two small X's in the upper right.

Tile Your Windows

If you regularly work with the same handful of screens, there is a faster way to access them. Open them all, then open the **Window** menu and select **Tile Vertically**. All the windows will be displayed on the same screen, arranged vertically. If there are enough of them, they will overlap. To activate one, just click on it. You can open it to full screen by clicking the small rectangle in the upper right and return to your vertical arrangement by clicking the double rectangle in the upper right.

If you'd prefer, you can **Tile Horizontally**. Or, you can click **Cascade** to display them stacked on top of each other with only each window's title label showing, as shown below. If you want to go back to a blank screen and start over, click **Window | Close All**. The **Window** menu also displays a list of open windows that can be used for navigation.



*If you click **Window | Cascade** with multiple windows open, QuickBooks will stack them, with only the bottom screen showing. Click on a title label to open a different window.*

The Desktop View

There are other ways you can make QuickBooks work the way you want it to. Open the **Edit** menu and select **Preferences**, then **Desktop View**. Click on the **My Preferences** tab if it's not already highlighted. There are several preferences here. Look under the **Desktop** heading. You can have QuickBooks open to the configuration of windows you want. Your options are:

- **Save** [the windows that are already open] **when closing company**.
- **Save current desktop** (a specific set of windows).
- **Don't save the desktop** (always open to just the home page).

Click the **Company Preferences** tab to add or remove icons from the home page. This is also where you turn features on and off.

We Are Here to Help You

All these suggestions may seem minor to you. But they will save time. More important, they will give you a better sense of control over the hours you spend on accounting tasks. And with so many things out of our control right now, creating a software environment that is tailored to your workflow can benefit you.

We know that you may be struggling right now to maintain your financial health, as well as your physical health. More than ever, we hope you will contact us if you have a QuickBooks or general accounting problem that we could solve. We will be happy to do what we can to help you through during this very challenging period.

We hope you find these QuickBooks tips helpful. Please visit our company website often at <http://www.accountingconnections.org> for we update it constantly. Our website offers a wealth of tax and accounting tips, along with links that will better serve your business needs. We archive our QuickBooks Tips newsletters on our website as well. They are printable PDFs for easy reference, as are our tax tips PDFs.

Accounting and Taxation is **our** business; making us a part of your team allows **you** to concentrate on **your** core business.



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