



WEBERMESSICK

# Recommended Preferences QBs Desktop



Preference options shown on the left pane  
Each option has 2 tabs:

- 1<sup>st</sup> tab – “My Preferences”  
Individual user account only
- 2<sup>nd</sup> tab – “Company Preferences”  
Global preferences for file

Preferences dialog box, Company Preferences tab. Options include: VIEW (One Window, Multiple Windows), DESKTOP (Save when closing company, Don't save the desktop, Save current desktop, Show Home page when opening a company file, Switch to colored icons/light background on the Top Icon Bar), WINDOWS SETTINGS (Display..., Sounds...), COMPANY FILE COLOR SCHEME (Pink).

Preferences dialog box, My Preferences tab. Section: SELECT DEFAULT ACCOUNTS TO USE. Options: Open the Write Checks, Open the Pay Bills, Open the Pay Sales Tax, Open the Make Deposits. Each option includes a form with dropdown and account selection.

Preferences dialog box, Company Preferences tab. Section: REPORTS AND GRAPHS. Options: Prompt me to modify (report options before opening a report), Refresh automatically, Don't refresh. Section: GRAPHS ONLY. Options: Draw graphs in 2D (faster), Use patterns.

Preferences dialog box, My Preferences tab. Options: Print account names onoucher, Change check date when non-cleared check is printed, Start with payee field on check, Warn about duplicate check numbers, Autofill payee account number in check memo. Section: SELECT DEFAULT ACCOUNTS TO USE. Options: Open the Create Paychecks, Open the Pay Payroll Liabilities. Section: BANK FEEDS. Options: Express Mode (new in QuickBooks Desktop 2014), Create rules automatically, Always ask before creating a rule, Classic Mode (Register Mode).

Preferences dialog box, My Preferences tab. Options: Pressing Enter moves between fields, Automatically open drop-down lists when typing, Beep when recording a transaction, Automatically place decimal point, Warn when editing a transaction, Bring back all one time messages, Turn off pop-up messages for products and services, Show ToolTips for clipped text, Warn when deleting a transaction or unused list item, Keep QuickBooks running for quick startups. Section: AUTOMATICALLY RECALL INFORMATION. Options: Automatically remember account or transaction information, Automatically recall last transaction for this name, Pre-fill accounts for vendor based on past entries. Section: DEFAULT DATE TO USE FOR NEW TRANSACTION S. Options: Use today's date as default, Use the last entered date as default. Section: KEEP CUSTOM ITEM INFORMATION WHEN CHANGING ITEM IN TRANSACTION S. Options: Ask, Always, Never.