8 SET-UP STEP 8

LET'S SET UP SOME MORE OF YOUR CUSTOMIZED PREFERENCES

Open the Preference option (Edit > Preferences) and change the following preferences:
(NOTE: You will have to click the Yes button when you move from one item to the next in the left-hand list.)

Checking:

My Preferences tab	Company Preferences tab
• Set the **Checking** account as the default account to use for *Open the Write Checks, Open the Pay Bills, Open the Pay Sales Tax*, and the *Open the Make Deposits* pull-down menus	*(none)*

Desktop View:

My Preferences tab	Company Preferences tab
• Turn on the checkmark for Switch to colored icons/light background on the Top Icon Bar (if you're using it.)	*(none)*

Payments:

My Preferences tab	Company Preferences tab
(none)	• Remove the checkmark next to "Use Undeposited Funds as a default deposit to account"

Payroll & Employees:

My Preferences tab	Company Preferences tab
(none)	• Select "No payroll"

Reports & Graphs:

My Preferences tab	Company Preferences tab
Select *Refresh reports automatically* in the *"Reports and Graphs"* section	• In the "Reports – Show Items By:" section select the Name only option • In the "Reports – Show Accounts By:" section select Name only option • Deselect "Default formatting for reports • Click the "Format" button. When the window opens up in the Header/Footer tab, remove the checkmark next to Date Prepared, Time Prepared, and Report Basis from reports

Sales & Customers:

My Preferences tab	Company Preferences tab
(none)	• Under Custom Pricing, select *No Custom Pricing*

Sales Tax:

My Preferences tab	Company Preferences tab
(none)	• Most common sales tax is *MO Sales Tax*