Customize the Quick List

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The Quick List is the user customizable menu that is on the left side of the main CenterPoint screen.

Red Wing Software has set up a default Quick List for you. The Quick List becomes a way for you to customize the menus in CenterPoint. You can customize it with groups that contain the most commonly used items in the software, to duplicate menu items in an order that makes sense to you, and to quickly launch menu selections without having to remember their locations. In the Quick List, you can move, resize, add items, change the way images display, or group items together in a logical sequence. It is completely customizable by you.

The Quick List is divided into groups with each group having an unlimited number of items. For example, Processes is the group and has items like Payments, Receipts, General Journal, etc. You can add any menu item as an item in a group. A user can also add a specific report to the Quick List.
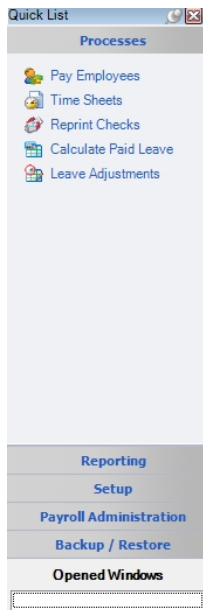
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What Is the Quick List?

The Quick List is the user customizable menu that is located, by default, on the left-hand side of the screen.

Add a New Group to the Quick List

1. Position your mouse over any area in the Quick List and right-click.
2. Select **Add Group** and enter a **Name** for the Group.
3. Click **OK**.

Add Menu Items to a Group

1. Position your mouse over the Group you'd like to add an item to.
2. Right-click and select **Manage Items**.
3. The **Manage Quick List Items** displays the CenterPoint menu on the **Menu Items** tab. Expand the menu you wish to access.
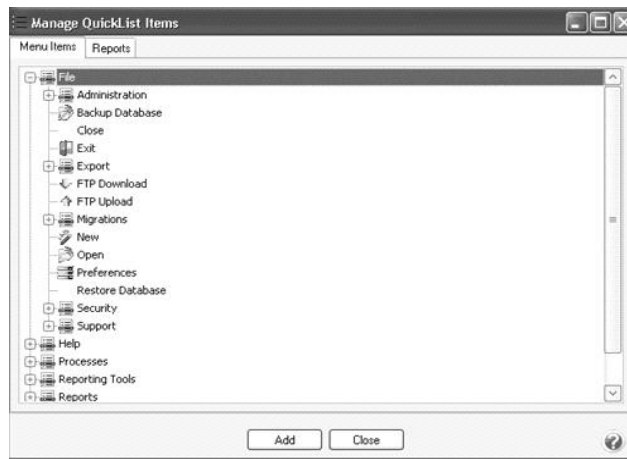
4. Select a menu item and click **Add**. Click **OK**.

Add a Report to a Group

1. Position your mouse over the Group you'd like to add an item to. Right-click and select **Manage Items**.
2. The **Manage Quick List** Items displays the CenterPoint menu.
3. Select the **Reports** tab.
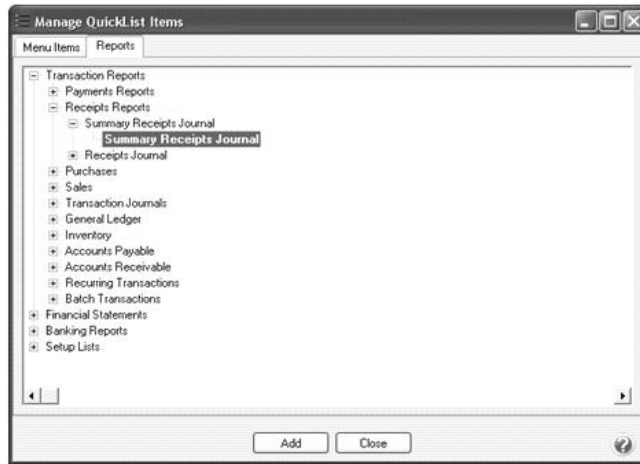
4. Select the report to add to the Quick List and click **Add**. Click **OK**.

> Note: If you save your favorite reports to a network location (set in File > Preferences > Reports > General, under Network Reports), the Network tab will display in Quick List > Manage Items and you can select a network favorite report to display on the Quick List.

Remove an Existing Quick List Group

1. Position your mouse over the existing Group that you'd like to remove. Right-click and select **Remove Group**.
2. Click **OK** on the **Confirm Group Remove** box.

Rename an Existing Quick List Group

1. Position your mouse over the existing Group that you'd like to rename.
2. Right-click and select **Rename Group**.
3. The existing name will be displayed. Modify or replace the name for this Group and press Enter to complete the process.

Move the Quick List

1. The Quick List will display, by default, on the left side of the screen as a vertical bar. But it can be moved. If it's moved to the top or bottom of the screen it will automatically switch to a horizontal bar.
2. To move the Quick List, simply "drag and drop" it to the location you'd like. This is done by left clicking on the blue bar of the Quick List, and dragging it to the appropriate location while still holding down on the left click. When it's in the appropriate location, release the left mouse button.

Move the Quick List Back to the Default Position

1. Select **View** > **Reset Quick List Position**.

Display Options for the Quick List

1. Right-click on the blue bar at the top of the Quick List and select one of the display options:

   » **Dockable** – Attached to the side or top of the screen and does not 'float.' It remains visible at all times. It is not necessarily visible at all times if docked. A Quick List can be dockable and set to auto-hide at the same time.

» **Hide** – Hides the Quick List all together. To get the Quick List back, select View > View Quick List.

» **Floating** – This allows you to place the Quick List wherever you want on the screen. A Quick List can be floating and dockable however. If it is both, then it allows you to drag to other sides of the available window and redock it. If the Quick List is not set as dockable or floating, then it is truly a free standing list that you can placed anywhere on the screen.

» **Auto-Hide** – Makes the Quick List hide until you hover over it on the side of the screen that it is docked on. With this option, the entire screen is available for CenterPoint's screens to fill.