

QuickBooks Shortcuts

By Donna Laubscher, CPA
(480) 483-1170 ~ DonnaL@hhcpa.com



As a frequent user of QuickBooks accounting software, I often look for ways to make my life easier and to get my job done a little more swiftly. I have listed some shortcuts that I find useful and I think will help you as well.

Shortcut One: Keyboard Tips Working with Dates

When in a date field there are many ways to change the date. Of course you can type the date or you can pull up the calendar but there may be faster ways to get to a specific date.

Changing by a Few Days. If you only want to change a few days try using the Plus (+) or Minus (-) key to move forward or backwards. You can hold the key down and change dates quite quickly but I generally recommend this for a change of a few days.

Changing by Weeks. You can go back to the first day of the week by using the letter W and forward to the last day of the week by using the letter K.

Note: Recognizing that these are the first and last letters of the word WeeK gives you a clue as to how you can move forward or back within the week.

Changing by Months. You can go back to the first day of the month by using the letter M and forward to the last day of the month by using the letter H.

Note: Recognizing that these are the first and last letters of the word MontH gives you a clue as to how you can move forward or back within the month.

Changing by Year. You can go back to the first day of the year by using the letter Y and forward to the end of the year at a time by using the letter R.

Note: Recognizing that these are the first and last letters of the word YeaR gives you a clue as to how you can move forward or back within the year.

Today. By now you will probably not be surprised to learn that you can return to today's date at any time by pressing the letter T.

Shortcut Two: Saving Transactions from Keyboard

When working in a transaction and tabbing from field to field, you eventually get to the point where you want to save the transaction.

If you do not wish to take your hands off the keyboard to move the mouse to the Save & New Button, try holding down the CTRL key while pressing the Enter key. This combination will execute whatever is highlighted, almost always the Save & New Button.

Shortcut Three: Calculations on the Fly

How often have you worked in QuickBooks and needed to add up numbers? Windows and QuickBooks both have calculators that you can pull up, but you really don't need them.

If you are in an amount field on a check or other transaction, just pressing the number keys followed by a mathematical symbol (+, -, /, *) you will pull up the calculator. You can continue to enter numbers and math functions until you are done.

Note: Just remember to press the Enter key to enter the amount into the number field. If you press the tab key you will lose the amount.

Shortcut Four: Working with Check Numbers

Many people don't realize you can enter something other than a check number in the check number field.

For example, you can use the word Debit for all transactions that are done online. Then put the online confirmation number in the memo field. This makes it easy to track the transactions and they show up grouped together on the bank statement reconciliation screen.

Note: Just be sure to be consistent with the word and the spelling, including capitalization or they won't be grouped together.

Shortcut Five: Making the Icon Bar Work for You

Last but not least, you can customize the icon bar at the top of the screen to hold the functions you use most often. Just right click on the icon bar and click on Customize.

These are just a few shortcuts that I find handy. There are several more out there if you do some research or consult the QuickBooks guide. If you have any questions regarding these shortcuts or QuickBooks in general, contact your Henry & Horne, LLP professional.

Donna H. Laubscher, CPA, is a Partner in the Scottsdale Office of Henry and Horne, LLP. Her areas of expertise include individual taxation and accounting services for business entities. Contact Donna at (480) 483-1170 or DonnaL@hhcpa.com.



Tempe
2055 E. Warner Road
Suite 101
Tempe, AZ 85284
(480) 839-4900

Scottsdale
7098 E. Cochise
Suite 100
Scottsdale, AZ 85253
(480) 483-1170

Casa Grande
1115 E. Cottonwood
Suite 100
Casa Grande, AZ 85222
(520) 836-8201

w w w . h e n r y a n d h o r n e . c o m