

Five QuickBooks Keyboard Shortcuts

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***Note from Intuit:** Caren Schwartz has long experience teaching clients and business professionals how to use QuickBooks, and has graciously allowed us to share some of her favorite shortcuts with your own QuickBooks advisor. Turn to your local advisor for all your QuickBooks needs.*

It's often the little things that bring the most joy. When teaching Intuit QuickBooks® accounting software, I am frequently surprised when I mention a way to do something that I assume everyone knows and find people say "That's great, I didn't know that". So to help you become more of a QuickBooks expert here are some of my favorite shortcuts.

Intuit has prepared a PDF version of this article that is client-ready, if that would be of use.

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 Week. 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 forward or back within the week.

Changing by Month. 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 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 do 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.

I like to use the word **Debit** for all transactions that I do online. Then I 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**.

I hope these tips make using QuickBooks a little easier as you go through the day.

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Caren Schwartz, Advanced Certified QuickBooks ProAdvisor, founded [Time & Cents Consultants, LLC](#), a Southport Connecticut firm, to help professionals select, install and get the most out of their software. Her philosophy is that companies can save time and money when they can better manage their time and money. Prior to establishing the company, Ms. Schwartz spent over 14 years as an executive with IBM, accountable for marketing support, quality development and training, and multi-million dollar revenue planning.