

Chapter 17

Ten Tricks for Speed (Well, Almost)

In This Chapter

- ▶ Commit shortcut keys to memory
 - ▶ Search for stuff the smart way
 - ▶ Learn to type, without delay
 - ▶ Automate anything you can
-

Although I've been slogging away for many months writing this book, even I realise there's much more to life than QuickBooks. Sure, I want to go to work, run my business and make money. But I like to have fun too, especially if good food, fine wine and exotic adventures to far-flung islands are involved.

If you also like to live life to the full and spend as little time as possible doing the books, then this chapter is for you. I've condensed my list to eight speed tricks, rather than ten, but who's counting anyway?

Take the Short Way Home

Want to record a cheque payment? You don't have to quit out of wherever you are, navigate to your home page and then click Write Cheques. No, you're much more intelligent than that. Instead, you simply type Ctrl+W and, in two shakes of a lamb's tail, you arrive at the Write Cheques window.

Using this shortcut means finding the Ctrl key (usually at the bottom left of your keyboard) and holding it down. Keep holding it down and then press the letter W. Let go and you're there.



Write Cheques isn't the only place you can go to using shortcuts. Ctrl+J takes you to the Customer Centre, Ctrl+I to Create Invoices, Ctrl+A to your Chart of Accounts and so on. I summarise these shortcut keys on the Cheat Sheet at the front of this book.

Forget That Furry Mouse

Want to move faster? Then grab your mouse, kiss it a fond farewell and hurl it out of the window.



This may sound radical but you can do just about every transaction without using your mouse. To see how this works, press the Alt key on your keyboard — next to the space bar. See how all the commands along the top menu suddenly have one letter underlined? (For example, 'Customers' becomes 'Customers'.) Now, instead of clicking the Customers menu with your mouse, you can press down the Alt button, followed by the letter 'u'.

After you arrive where you want to go, continue working without your mouse. Press the Tab key to go forwards, or the Shift key plus the Tab key to go backwards.

Get Smart When Searching

Looking for something? Don't waste time trawling through the registers. Instead, cut straight to the chase and do an Advanced Find.

1. **From your home page, head up to the Edit menu and click Find.**
2. **Click the Advanced tab.**
3. **Choose a Filter — in other words, click on the type of filter that you want to search by.**

If you want to search for an amount, click the Amount filter (see Figure 17-1). To search on a word that's part of a transaction's memo, select the Memo filter. To search on an invoice or bill number, click the Number filter.



Don't forget that you can run multiple filters on a single search — for example, searching for all transactions within the current month that have \$10,000 as the amount, and the word 'Lotto win' in the memo. (Optimism never dies.)

4. **Enter some details on what you're searching on.**

For example, enter the amount, word or invoice number you're searching for. Or, if you're searching by name, either select a single name from the list or click Multiple Names and then select whatever names you want from the list.

5. **Click Find.**

All transactions that match your criteria flash up on the screen. Isn't QuickBooks the ants pants? To print a report showing the transactions found, click Report.

6. **To open a transaction, select the transaction you want to see and click Go To.**

Alternatively, to start again and search for different transactions, click Reset.

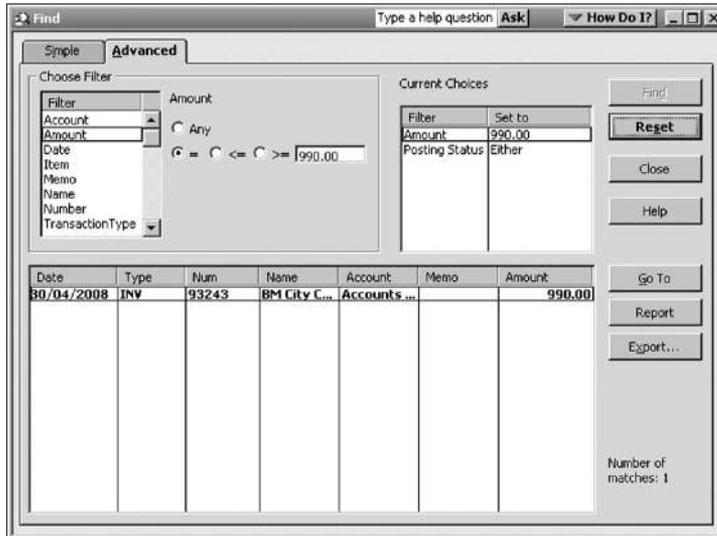


Figure 17-1:
Using
Advanced
Find in
QuickBooks
to track
down a
transaction.

Work Those Fingers

I doubt there's any other activity that people spend so much time doing quite so badly. The average person wouldn't consider using a Swiss army knife to chop down a tree, but yet persist in using a computer, hour after hour, without learning how to type.



It's basic. If you spend more than half an hour a day working on a computer, then you should know how to type. The average speed of a non-typist is about 15 words a minute — and that's for a pretty hot two-fingered typist — but by touch-typing, you can easily expect 60 words a minute. That's four times faster!

So, if you're a non-typist and you usually spend four hours a week in front of the computer and you learn how to type, you'll save about three hours a week, every week. And learning how to type only takes about an hour a day for six weeks.

Even if you can type properly, consider your employees. If they're spending time in front of the computer every day and they can't touch type, think about paying for them to learn.

Memorise Regular Transactions

Most businesses have a number of transactions that happen every week or every month. Regular lease payments, loan repayments, rent payments and repeating sales are common examples of transactions that are made over and over.



Don't put yourself through the agony and toil of writing the details afresh each time. Instead, memorise these transactions: With the transaction open, select Memorise from the Edit menu, and give this transaction a name. For transactions that are the same every month, tell QuickBooks to record this transaction automatically by making it a Standing Order. For transactions that vary, ask for QuickBooks to pop up with a reminder when they're due.

To call up a memorised transaction, either go to Lists>Memorised Transactions (or type Ctrl-T if you're feeling clever), and double-click the memorised transaction.

Become a Copycat

Why type details again and again, when QuickBooks can do the legwork for you? If your business has any transactions that are repetitive, it's time to tweak your preferences:

- ✓ **Banking preferences, Company tab.** If you click the option Autofill Payee Account Number in Cheque Memo, then QuickBooks automatically displays a supplier's account number into the Memo field of a Write Cheques transaction.
- ✓ **General preferences, My Preferences tab.** If you click the option Automatically Remember Account Or Transaction Information, QuickBooks either recalls all details of the last transaction for this name, or the Account only. (I prefer QuickBooks to recall the Account only, because transaction amounts normally change.)
- ✓ **General preferences, My Preferences tab.** The default date for new transactions can be either today's date or the last entered date. I find that if a client is doing a backlog of bookwork, then setting the default date to the last entered date works best.

Get Columns Just Where You Want 'Em

Don't waste time scrolling up and down lists. Sort them any which way, simply by clicking on the column header. To see what I mean, call up your Item List. Want to sort by Description, rather than by Name? Click on the Description column once and the deed is done. Apply the same principle to sort by item Type, Account or Price.

The other trick is to change the columns themselves. If the columns that QuickBooks shows as a default don't provide the info you need, go to View ▾ Customise Columns and choose the columns you want to see, the columns to hide and the order you want to view them in. All lists in QuickBooks can be customised this way.

Stop Printing

If you can avoid printing, then rest assured that not only will you save a few trees, but you'll save time as well. As long as you keep good backups of your QuickBooks company file (as explained in Chapter 15), you don't need to hang on to paper records. Consider the following:

- ✓ **Customer invoices.** Why print a customer invoice? Email it instead. Certainly, don't bother printing copies of customer invoices. If you need a duplicate copy of an invoice later on, open QuickBooks and print it again.
- ✓ **Purchase orders.** Why on earth would you print a purchase order when you can email it direct from your QuickBooks company file?
- ✓ **Profit & Loss reports.** So management wants a monthly Profit & Loss report? Display the report and select Send Report as PDF from the Email menu.
- ✓ **Customer statements.** No need for all that printing and posting. Just email 'em.
- ✓ **Remittance advices for suppliers.** Forget about printed cheques and remittance advices. Pay electronically instead, then email remittance advices direct (refer to Chapters 6 and 16)