

Appendix C: Keyboard Shortcuts

This appendix lists the various keyboard shortcuts available for use in Drake's tax software, Client Status Manager, EF Database, email program, calculator, and Print mode:

Table C-1: Home Window Keyboard Shortcuts

Desired Action	Keyboard Keys
Open Returns	CTRL + O
Calculate returns	CTRL + C
Print returns	CTRL + P
View returns	CTRL + V
Open recent client files	Enter 1-9
Open Quick Estimator	CTRL + Q
Open Client Status Manager	CTRL + L
Open EF Return Selector	CTRL + S
Transmit/Receive	CTRL + T
Open Drake Software Help	CTRL + F1
Exit the program	ESC

Table C-2: Navigating Through Data Entry Screens

Desired Action	Keyboard Keys
Move cursor forward one field	TAB, ENTER, or DOWN ARROW ↓
Move cursor back one field	SHIFT + TAB, CTRL + UP ARROW ↑, or SHIFT + ENTER
Move cursor with a field	LEFT ARROW ← or RIGHT ARROW →
Delete character behind the cursor	BACKSPACE
Delete character in front of the cursor	DELETE
Move to last field on the screen	CTRL + END
Move to first field on the screen	CTRL + HOME
Bring up additional data entry screens (W2, 1099, etc.)	PAGE DOWN
Return to previous screen or exit	ESC
Go to the first position in a data entry field	HOME

Table C-2: Navigating Through Data Entry Screens

Desired Action	Keyboard Keys
Go to the last position in a data entry field	END
Navigate up and down a data entry screen	CTRL + UP ARROW ↑ or CTRL + DOWN ARROW ↓
Access View mode	CTRL + V
Access Print mode	CTRL + P
Access data entry from View or Print mode	CTRL + E
Access an action menu	Right-click in field Right-click in gray area

Table C-3: Data Entry Function Keyboard Shortcuts

Desired Action	Keyboard Keys
For field help during data entry or to verify a Social Security Number	F1, or SHIFT+?
Insert today's date in any date field	ALT+ D
Calculate a return	CTRL+ C
View a return	CTRL+ V
Print a return	CTRL+ P
Return to data entry from view or print mode	CTRL+ E
Split MFJ return to MFS return	CTRL+ S
Open a Detailed Worksheet; Access Form 4562 from the Depreciation field	Double-click, CTRL+ W, or Right-click > Add Worksheet
View preparer notes	CTRL+ R
Enter the Preparer note pad (PAD screen)	CTRL+ SHIFT+ N
Increase Declaration Control Number (DCN)	CTRL+ M
Toggle heads-down and standard data entry	CTRL+ N
Delete a data entry screen	CTRL+ D
Carry data to an amended screen	CTRL+ X
Reset the screen	CTRL+ U
Exit screen without saving changes	SHIFT+ ESC

Table C-3: Data Entry Function Keyboard Shortcuts

Desired Action	Keyboard Keys
Open Help	Within data entry: CTRL+? From Home window: CTRL+ F1
Flag a field for review	F2
Clear a flagged field	F4
Clear all flagged fields	CTRL+ SHIFT+ SPACEBAR
Open Drake Documents	F6
Open Drake Tax Planner	F7
Open the Set Client Status menu	F8
Go to EF database	F9
Activate the calculator	F10
Email a client data file	F11
Exit data entry	Esc
View / Open Forms-based data entry	CTRL+ G (1040 returns only)
Opens Macros	CTRL+ SHIFT+ M

Table C-4: Client Status Manager Keyboard Shortcuts

Desired Action	Keyboard Keys
Open CSM from the Home window	CTRL + L
Open selected client in CSM	CTRL + O
Search for a client record	CTRL + F
Customize the display	CTRL + D
Refresh the display	F5
Filter the client list	CTRL + L
View information for the currently selected return	CTRL + Q
Generate reports	CTRL + R
Export to Excel	CTRL + E
Help	F1
Exit CSM	Esc