

E-MAIL HOT KEYS

DESIRED ACTION	HOT KEYS
E-mail a client data file from data entry	F11
Check mail / Send and Receive	CTRL + M
Open a message	CTRL + O
Edit address book	CTRL + E
Create a new mail message	CTRL + N
Print a message	CTRL + P
Reply to a message	CTRL + R
Forward a message	CTRL + F
Delete a message	CTRL + D
Send a message in the New Message window	ALT + S
Open an address book list in the New Message window	ALT + T
Attach a file to a message in the New Message window	ALT + A
Check Mailbox Status	CTRL + S

CALCULATOR FUNCTIONS

Note: Entering numbers and their operators can be done in three ways: (1) using the numeric keypad on the keyboard, (2) using the numbers on the typewriter keyboard, or (3) using the pointer to click the numbers and operators on the calculator. When an unformatted schedule is appropriate, press Ctrl + W in a numeric field to produce a detailed worksheet.

DESIRED ACTION	OPERATOR	INSTRUCTIONS
To access the calculator in a numeric field	F10	With the cursor in the desired field during return data entry, press F10.
Clear a number	NUM-LOC	Press NUM-LOCK key on the keyboard to clear the current calculation, then NUM-LOCK again to enable the keypad, or click the C button on the calculator.
Insert calculation total in data entry field	F1 or F1-Insert Result	With the desired total in the summary field, press F1 or click F1-Insert Result on the screen. The calculator closes and the calculation total transfers to the active data entry field.
To exit the calculator	Esc	To deactivate the calculator without inserting data in a field, press Esc or click ESC-Quit on the screen.
Addition	+	Enter the number to be added and press +.
Subtraction	-	Enter the number to be subtracted and press -.
Multiplication	*	Enter the first number in the equation and press *. Then, enter the second number. Press ENTER or click = on the screen to complete the calculation.
Division	/	Enter the number that you wish to divide and press /. Then, enter the number that you wish to divide by. Press ENTER or click = on the screen to complete the calculation.

QUICK REFERENCE GUIDE

NAVIGATING THROUGH RETURN DATA ENTRY

DESIRED ACTION	KEYBOARD KEYS
Move cursor forward one field	TAB, ENTER, OR ↓
Move cursor back one field	SHIFT + TAB, CTRL + ↑, OR SHIFT + ENTER
Move cursor within a field	← OR →
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 (W-2, 1099, schedules, etc.)	PAGE DOWN
Return to previous screen or exit	ESC
Go to the first position in a data entry field	HOME
Go to the last position in a data entry field	END
Navigate up and down a data entry screen	CTRL + ↑, OR CTRL + ↓
Access view mode	CTRL + V
Access print mode	CTRL + P
Access data entry from view / print mode	CTRL + E
Access an action menu	Right Click in Field / Right Click in Gray Area

MAIN SCREEN HOT KEYS

DESIRED ACTION	HOT KEYS
Open Returns	CTRL + O
Calculate Returns	CTRL + C
Print Returns	CTRL + P
View Returns	CTRL + V
Open Recent Client Files	1 - 9
Open the Quick Estimator	CTRL + Q
Open the Client Status Manager	CTRL + L
Open the EF Return Selector	CTRL + S
Transmit / Receive	CTRL + T
Open Drake Software Help	CTRL + F1
Exit the program	ESC
Repair index files	CTRL + R

DATA ENTRY HOT KEYS

Right-click the gray area in data entry to access a list of commonly used functions and hot keys.

DESIRED ACTION	HOT 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
Open Help	(Within Data Entry CTRL + ?) OR (CTRL + F1 from Home)
Flag a field for review	F2
Clear a flagged field	F4
Clear all flagged fields	CTRL + SHIFT + SPACEBAR
Open the Drake Document Manager	F6
Open the Tax Planner	F7
Open the Set Client Status menu	F8
Go to EF database	F9
Activate the calculator	F10
E-mail a client data file	F11
Exit data entry	ESC
View / Open Forms Based Data Entry	CTRL + G
Opens Macros	CTRL + SHIFT + M

PRINT MODE HOT KEYS

DESIRED ACTION	HOT KEYS
Toggle in and out of classic mode	CTRL + S
Return to Data Entry	CTRL + E
Print Selected Form	CTRL + P
Quick Print Select Form	CTRL + Q
Help	F1

CLIENT STATUS MANAGER (CSM) HOT KEYS

DESIRED ACTION	HOT KEYS
Open the CSM from the Home window	CTRL + L
Open the selected client in the 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

FREQUENTLY USED CODES

FIELD	CODE	APPLICATION
TS or TSJ	T	Assigns data to the primary taxpayer. The program defaults to T if the field is left blank.
	S	Assigns data to the spouse.
	J	Assigns data to both the taxpayer and spouse.
F	0 (zero)	To exclude data from the federal return, enter 0 (zero).
ST	State Code	For a state return, enter the appropriate two-letter state code (postal service abbreviation). If the field is left blank, the program defaults to the resident state.
	0 (zero)	To exclude data from any state return, enter 0 (zero).
	PY	For multi-state returns, use PY as the resident state code on screen 1. Do not use PY on any other screen.
C	City Code	For city returns, enter the appropriate city code to indicate the source of income.
Multiple	1-99	For Form 4562 (depreciation), indicate the appropriate schedule for the depreciated item in the For field. Indicate where the information should be carried when there are multiple schedules.

SEARCH EF DATABASE

KEY	FUNCTION	INSTRUCTIONS
F1	General information	View basic EF information about the taxpayer: taxpayer information, federal and state acknowledgement codes, acknowledgement dates, transaction date, filing status, refund amount, or balance due.
F2	Bank information	Access detailed loan information, direct deposit information, Declaration Control Number, etc.
F3	Fees/miscellaneous information	Access miscellaneous information, including Earned Income Credit and AGI, MISC field data, firm and preparer numbers, and tentative fee distribution details.
F4	Reject code lookup	Access the reject code lookup feature, which allows you to search for federal and state reject code descriptions, loan status codes, and bank decline reasons.
F5	Return to data entry	Opens return data entry for the client.
F10	Online Database	View your online database from data entry or from your EF Database.