

QUICK REFERENCE GUIDE

NAVIGATING THROUGH RETURN DATA ENTRY

DESIRED ACTION	KEYBOARD KEYS
Move cursor forward one field	TAB, ENTER, OR DOWN ARROW
Move cursor back one field	SHIFT + TAB, SHIFT + ENTER, AND UP ARROW
Move cursor within 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 (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 + UP ARROW, OR CTRL + DOWN ARROW
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

HOME WINDOW KEYBOARD SHORTCUTS

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 KEYBOARD SHORTCUTS

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	Double-click, Ctrl + W, or Right-click and select Add Worksheet
Add Reminder	CTRL + R
Open the Preparer notepad (PAD screen)	CTRL + SHIFT + N
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
Highlight Prior Year Fields	F11
Show Prior Year Data	F12
Exit data entry	Esc
View / Open Forms Based Data Entry	CTRL + G
Opens Macros	CTRL + SHIFT + M
Toggle among tabs on tabbed data entry screens	CTRL + TAB

PRINT MODE KEYBOARD SHORTCUTS

DESIRED ACTION	HOT KEYS
Toggle to Basic View	CTRL + S
Return to data entry	CTRL + E
Print selected forms	CTRL + P
Quick print selected form	CTRL + Q
PRINT SELECTED FORMS TO PDF	CTRL + D
EMAIL SELECTED FORMS	CTRL + M
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 enters "T" by default 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 blank, the program uses the resident state by default.
	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 <i>not</i> use PY on any other screen.
C	CITY CODE	For city returns, enter the appropriate city code to indicate the source of income.
Multiple	1-999	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	INSTRUCTION
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.

SOFTWARE SUPPORT WITHIN DRAKE TAX PROGRAM

Several support resources are available from within the Drake Tax program itself.

Frequently Asked Questions (FAQs)

An **FAQ** screen is included with each tax software package in Drake Tax, accessible from any tab on the **Data Entry Menu** or by typing FAQ into the selector field and pressing ENTER. **FAQ** content varies by state and package.

Help Resources

Drake Tax offers many ways for you to get the help you need. When you click the **Support** button from the **Home** window, you are given the following options and more:

- **Drake Software Knowledge Base**, an online reference source containing answers to common tax and software questions.
- **Drake Software Program Help**, a searchable "Drake encyclopedia," arranged in "books" and an index. The Help System answers many of the most commonly asked questions about the software
- **Drake Software Support Website**, a website with links to all of our online help resources, including the Knowledge Base, Drake ETC and many other helpful Web pages.
- **Video Tutorials**, a compendium of more than 200 how-to videos Drake Tax has released on how to use Drake Tax and related programs.
- **Manual and Online Resources**, a link to Drake Tax manuals, practice returns, IRS pubs, and Drake Software shipment letters, all in PDF format, readable online or available for download.

Data Entry Help

Drake Tax offers its screen-level and field-level help to explain the uses for certain screens, what data is expected in which fields, and how to find more information through links and IRS references.

Field Help

Field help provides information about a selected field. There are three ways to access field help:

- Click inside a field and press F1
- Click inside a field and press SHIFT+?
- Right-click in a field and select **Help > Help for this Field** from the right-click Menu

Screen Help

Screen help provides information about an open screen in data entry. There are several ways to access screen help:

- From the data-entry screen toolbar, select **Help**
- Select **Screen Help** from the right-click menu
- Press CTRL+ALT+? from your keyboard

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For support, call 828.524.8020 or email Support@DrakeSoftware.com