Shortcuts/Time Savers in Transaction Entry

Document #:	3053	Product:	CenterPoint®

CenterPoint offers multiple ways to customize the setup and transaction entry screens. These modifications and processes will enable you to enter transactions more efficiently.

- Dates
- Keyboard and Function Keys (Hot Keys)
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Dates

The Date field in transaction entry screens will default to today's date. The date can be changed by pressing F4 or clicking the calendar icon to display a calendar or by simply entering the correct date for the transaction.

There are various ways that the date can be entered.

- If only the **day of the month is entered** in a Date field, the current month and year will automatically be used. For example, if it's February, 2024 and 25 is entered in a date field the system will auto-fill the date with 2/25/2024.
- If the **month and day is entered** (02/25 for example), the system will auto-fill the current year. The month and day can be entered with or without a slash or hyphen as a separator. If it is entered without the separator, then two digits must be entered for both the month and day (0225).
- Or the full month, day and year date can be entered (12/25/24). Again, the date can be entered with or without a separator. If entered without a separator, each field must be entered as two or four characters.

Note: After you enter the date, press Tab. The system assumes the month and year are the same as the workstation date.

Keyboard and Function Keys (Hot Keys)

The keyboard can be used to move through the transaction entry screen. Using specific keyboard keys and combinations provides a way for you to do things that would normally be done with the mouse.

- Move the cursor to the next field by pressing **Tab**.
- Move the cursor to the previous field by pressing **Shift + Tab** .
- When you press **Enter** in a list box the selection is accepted, on a command button the action is performed, and acts like a Tab key if the Pressing Enter Acts Like Tab Key selection is set to Yes in the File > Preferences > General > Defaults preference.
- Move up or down in list boxes by using the **Arrow** keys.
- In a field with a list box, press the **Alt + Down Arrow** to display the list.
- On a command button press the **Space bar** to perform the action or on a check box toggles the selection.
- In a text field, pressing **Delete** removes the highlighted text.
- In a text field, pressing **Home** positions the cursor at the beginning of the text field and pressing **End** positions the cursor at the end of the text field.
- In a screen where the VCR buttons are available (Names, Accounts, Employees, etc.) press **Alt + Home** to move to the first record in the list, press **Alt + End** to move to the last record in the list, press **Alt +** ← to moves to the previous record in the list, or press **Alt +** → to move to the next record in the list.

There are a variety of function keys available in transaction entry. Using the function keys provides a way for you to do things that would normally be done with the mouse.

- Any field that has a **Lookup** button (for example, Pay to the Order of, Account, etc.) that can be selected with a click of the mouse button, can also be selected by pressing **F4** on the keyboard.
- In numeric and amount fields, pressing **F9** will open a **calculator**. After using the calculator, press **F9** again to input the sum of the calculation into the field in CenterPoint.
- Pressing **F4** in a **Date** field, will display a calendar that can be used to select the date.
- **Hot keys** can be used instead of clicking on buttons with the mouse. The underscored letter on a button is a hot key. For example, the Save button in transaction screens has the letter S underscored. Pressing the **Alt** key + the letter **S**, will **Save** the transaction the transaction or **post** the transaction (on some transaction screens) without having to use the mouse to click on the Save or Post button. The Options button in transaction screens has the letter O underscored. Pressing the **Alt** key + the letter **O**, will open the menu for the Options button without having to use the mouse to click on the Options button.

Lookups

Many of the fields in transaction entry display a Lookup button that provides you with a list of items that can be used for that field. The data in those lists can be searched to find the item you need. Unless custom lookup options have been specified for that field, CenterPoint will search the data based on the options selected in **File** > **Preferences** > **General** > **Defaults**.

The Lookup Settings in File > Preferences > General > Defaults define how entering data into the Lookup box searches the information in the associated list. The options for how the lists are searched are:

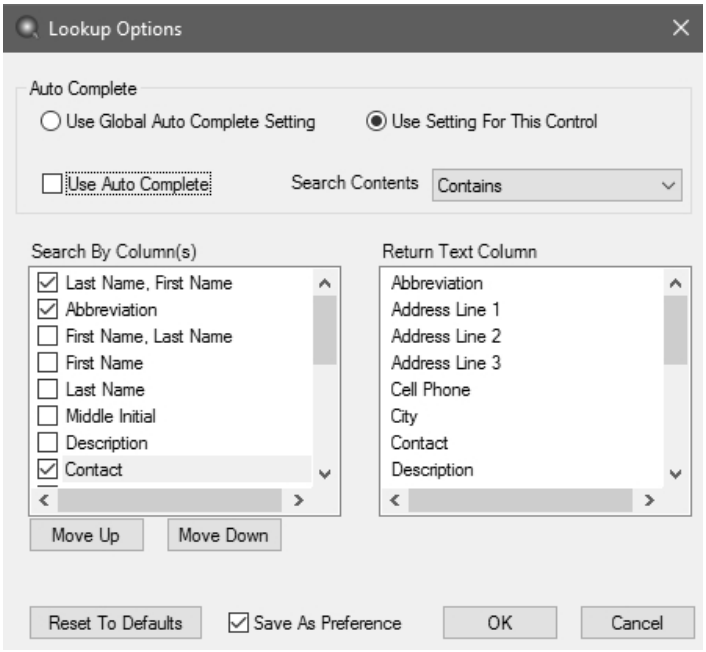
- **Use Auto-Complete** - As you enter characters in a Lookup box, CenterPoint attempts to match the characters entered in a list. If a match is made, the record will automatically display. By selecting this option all lookup boxes by default will use the auto-complete feature. This selection can be overridden on a field-by-field basis throughout the system. Auto-complete fills in the field as you type. It looks for the first match of the characters typed in and fills the field with it. If that is not the match that you want, continuing to type in additional characters usually narrows it down to the selection you are looking for.
- **Allow to Query For Items On Multiple Fields** - Enter characters and press the Tab key to display a filtered list of matched records. The query will attempt to match the characters in the name or abbreviation. If nothing is found, the query searches for the character string within the name or abbreviation. If this option is selected, you can have CenterPoint lookup a record based on multiple fields. For example, an account with an account number of 1234 and an abbreviation of ELEC and an account name of Electricity can be looked up by either typing in the number, abbreviation, or name. The auto-complete option only allows lookup on one field, so it would have to be either Number or Abbreviation or Name, but not any combination of them.

- **Initial Search Contents**
  - **Begins With** - will search only the first characters of the columns specified under Searched By Columns.
  - **Contains** - will search the entire string for the match. For example, if the name is State of Minnesota and you enter State, a match is completed or if the name is Channel Fire Protection and you enter Fire, a match is completed.

Several custom lookup options are available for any field containing a Lookup button. The options will allow you to specify which fields to search for matches and how the information will be displayed. To access the Lookup Options, **right-click** in any **Lookup** field and select **Options**.

- **To change the columns in the list that the lookup searches when data is entered on a field-by-field basis:**
  - In the following example, the Customer lookup box will search the Contact column as well as the default Last Name, First Name, and Abbreviation columns for all cusotmers that contain the data entered into the Customer lookup box

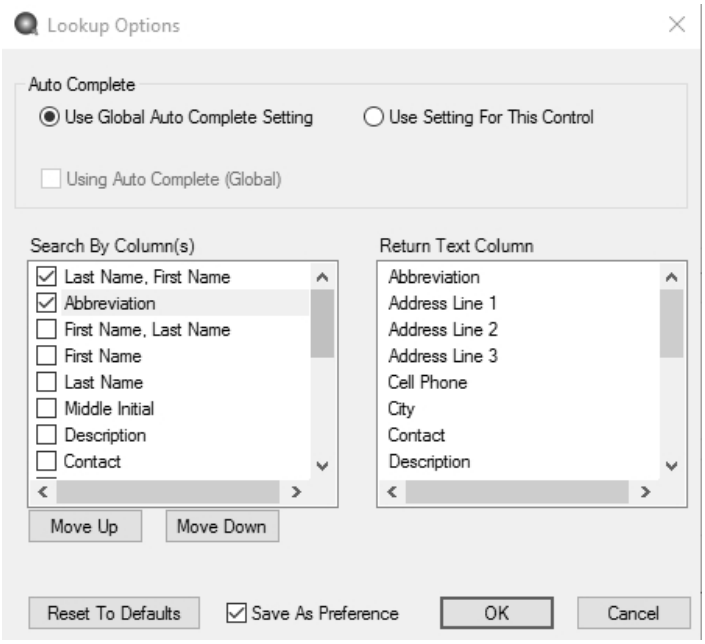
1. From the Customer lookup box, right-click and select **Options**.
2. Select **Use Setting For This Control**.



3. Under Search By Column(s), select **Contact**.
4. Select **Save asPreference** and click **OK**.

- **To change the initial search contents for lookups on a field-by-field basis:**
  - In the following example, during invoice entry, Items are searched by entering a specific word in the Item box.

1. From the Item lookup box, right-click and select **Options**.
2. Select **Use Setting For This Control**.



3. In the **Search by Contents box,** select **Contains**.

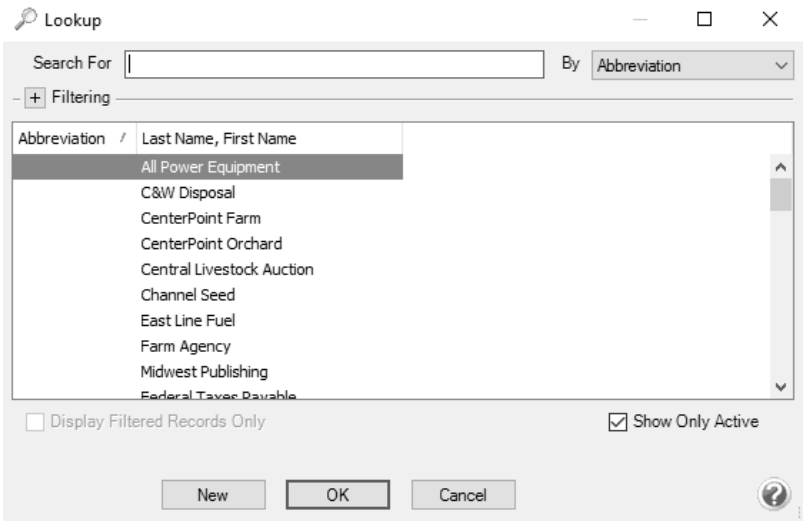
The options available for customizing field-by-field lookups using the Search by Contents box are::

- **Use Global Preference** - uses the Lookup Field Settings preferences set in File > Preferences > General > Defaults.
- **Begins With** - will search only the first characters of the columns specified under Searched By Columns.
- **Contains** - will search the entire string for the match. For example, if the name is State of Minnesota and you enter State, a match is completed.

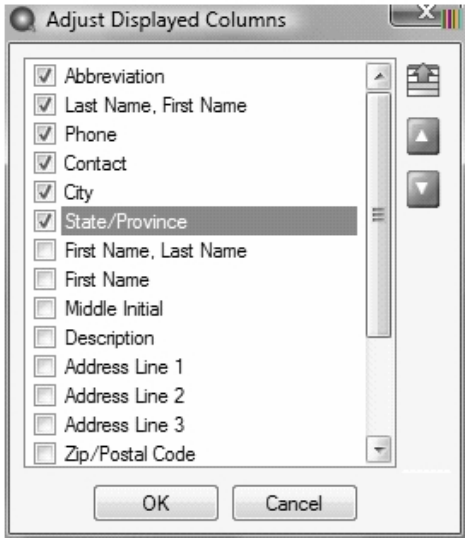
4. Select **Save as Preference** and click **OK**.

Customizing the Lookup List:

When the Lookup button is selected (by clicking on it with the mouse or pressing F4), the list of items for that field are displayed. The columns displayed in the Lookup screen can easily be customized.



1. After pressing **F4** or clicking on the Lookup button , **right-click** anywhere in the **Lookup** screen.
2. Select **Add/Remove Columns**.



3. Select each of the columns that you would like displayed in the Lookup screen for this field. Use the **Move Up** and **Move Down** arrows on the right to decide the order the columns will be displayed.
4. Click **OK**.

Set As Default Option

If you typically use the same company or bank account in the transaction entry screens, these selections can be set as the default so that you do not have to select or enter the information for each transaction. To access this option, select the list item (Company, for example) that you want this screen to display automatically as the default for this database, **right-click**, and then select **Set As Default**. This option is available in a variety of fields throughout the transaction entry screens.

Tab Stops

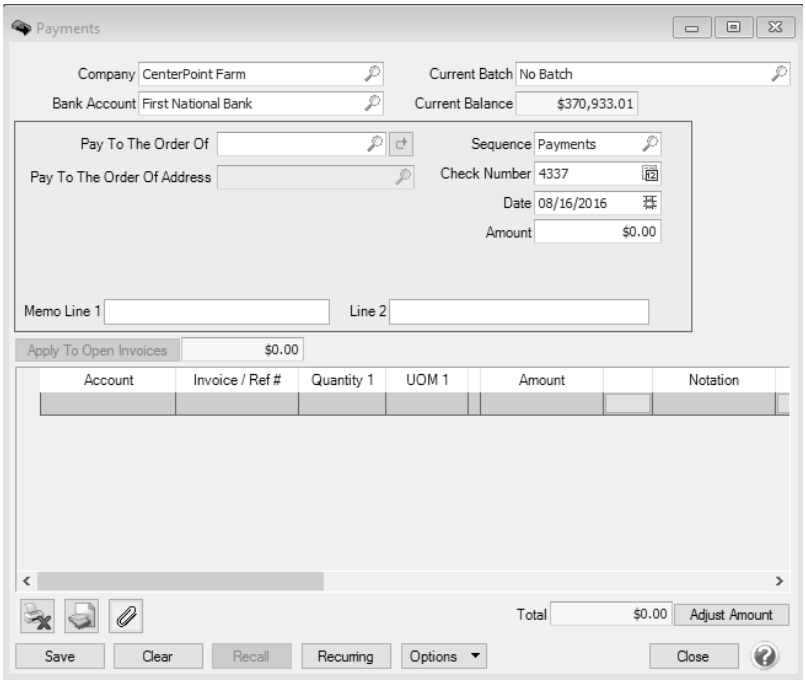
It is easy to customize your transaction entry screens by setting tab stops. Tab stops allow you to choose which fields the cursor stops at in each transaction entry screen. For example, if you never change the bank account or the batch, remove the tab stops so your cursor skips those data entry boxes.

To set tab stops

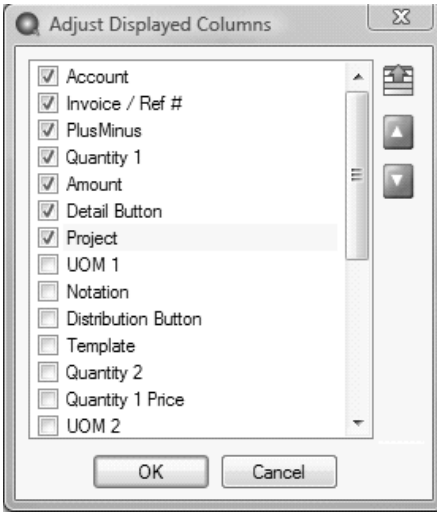
1. On any transaction entry screen, click **Options**, and then click **Set Tab Stops**.
2. On the Set Tab Stops screen, select the fields to stop at during transaction entry.
3. Click **OK**.

Customize the Columns Displayed in the Transaction Entry Grids

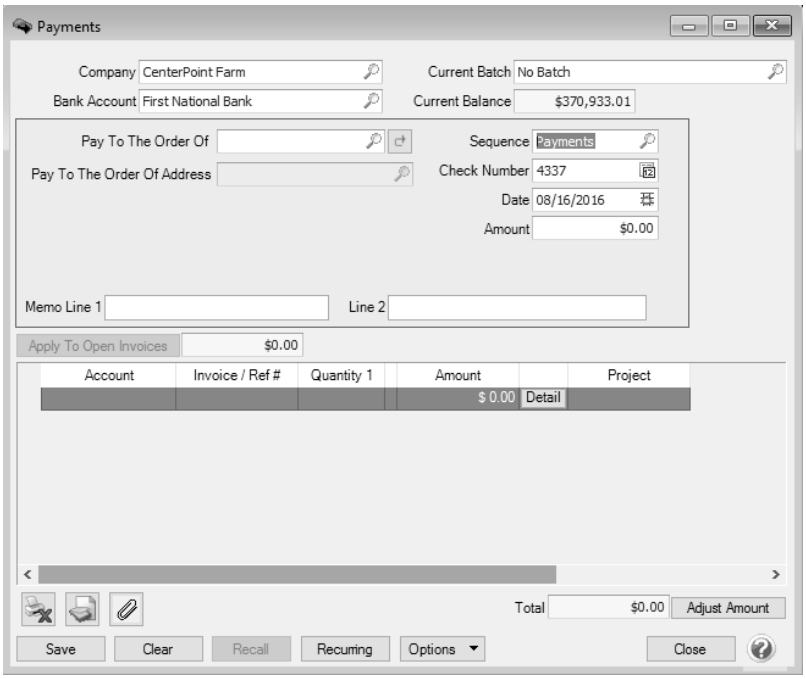
Each transaction entry screen includes a variety of columns organized in a grid. The columns displayed in this area, within each transaction entry screen and to the transaction detail grid (viewed by clicking the (+) sign to expand the journal entry), can be customized for the needs of your company. The selections can be changed at any time. In our example, we will customize the grid found in the Payments screen.



1. Position your mouse over any cell in the grid found in the bottom portion of the screen.
2. **Right-click** and select **Add/Remove Columns**.



3. The list displays all available columns that can be included in your data entry screen. Items that have a **check mark** will display in the grid. Remove or insert check marks as needed.
4. Use the **Move Up** and **Move Down** to arrange the order the columns will display on the main grid.



Recall a Transaction

The Recall feature in CenterPoint can be used to save data entry time in any transaction entry screen. After entering a name on a transaction, clicking the Recall button automatically fills in all details from the last transaction including accounts, values, notations, and any details of the transaction. If the Recall button is selected again, the second most recent transaction for that name will be displayed. Recall is useful for activities that are the same amount and same details each transaction.

Note: You can select the way recalled transactions display by default on the Vendor Invoices (A/P), Payments, Receipts, and Customer Invoices screens to either Recall by Company or Recall by Company and Bank from the Options button.

Note: If a Recalled transaction is used and the transaction has inactive accounts included, a warning will display that includes a list of the inactive accounts. You can choose whether to display the warning in the future in File > Preferences > Accounts> Inactive Accounts.

The Recall functionality can be used by manually selecting the Recall button in a transaction entry screen or an individual Name can be set to automatically Recall Last Transaction in a specific transaction entry screen.

Manually Using the Recall Button in Transaction Entry:

1. On any transaction entry screen, after entering Name click **Recall** at the bottom of the screen to display the most current transaction entered for this name. Click **Recall** again to display the next most current, etc.

Note: When you click Recall, transactions are displayed in reverse chronological order.

2. The current date is assigned and if applicable, the check number is incremented based on its numbering sequence. Make any needed modifications to the transaction and click **Save**.

Setting Up a Name to Automatically Recall Last Transaction in a Specific Transaction Entry Screen

1. On any transaction entry screen, after entering Name click **Recall** at the bottom of the screen to display the most current transaction entered for this name. Click **Recall** again to display the next most current, etc.

Note: When you click Recall, transactions are displayed in reverse chronological order.

2. The current date is assigned and if applicable, the check number is incremented based on its numbering sequence. Make any needed modifications to the transaction.
3. Right click on the **Name** field and select **Transaction Settings > Recall Last Transaction** and click **Save**.
4. For each subsequent transaction entered in this screen for this name will automatically recall the previous entry.

Recurring Transactions

Monthly utility bills, insurance payments, annual rent payments are all examples of recurring transactions. These types of transactions can be identified in CenterPoint as recurring transactions, which eliminates the job of reentering the same details each time you need to process the transaction.

In the **Payments** and **Receipts** screen, the recurring transaction flag is set, after entering a transaction, but before clicking Save. For example, in the Payments screen; after the expense rows are entered and BEFORE you click Save, click the Recurring button at the bottom of the screen.

In **Customer Invoices** and **Vendor Invoices (A/P)**, an invoice is identified as a recurring entry by selecting a recurring batch in the **Current Batch** field.

Note: If a Recurring transaction is used and the transaction has inactive accounts included, a warning will display that includes a list of the inactive accounts. You can choose whether to display the warning in the future in File > Preferences > Accounts > Inactive Accounts.

Please refer to the various recurring transaction documents we have available in the Help for step-by-step instructions on the setup and use of recurring transactions. In the Help, in the **Search** bar, enter **recurring**, and then click to display the documents.

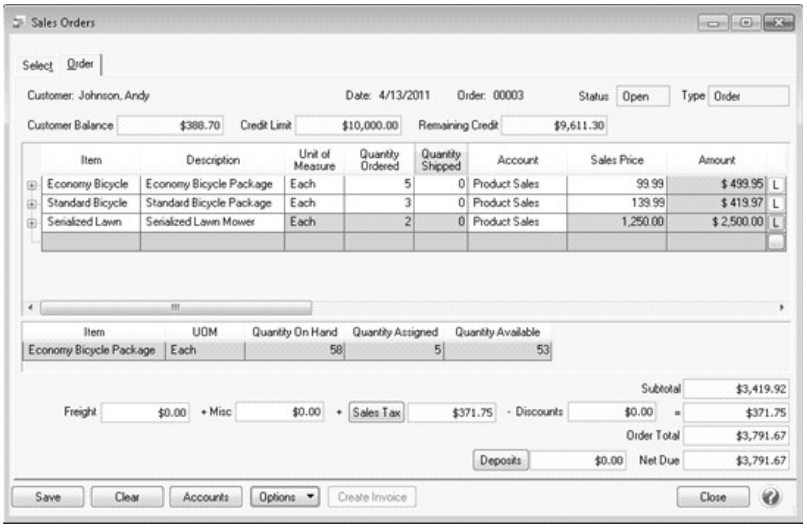
Review Transactions

To review transactions entered on a transaction screen, click **Options**, and then click **Review Transactions**. Transactions can be modified from this screen by selecting the transaction and then clicking **Edit**. From the drop-down list next to the Edit button, the number of results to display can be defined. The options are 10 (default), 25, 50 or 100 results.

To review transactions in a Transaction Search screen for a selected name, entry screen, and current year, right-click on the name and select **Review Transactions**.

Display Read-only Grid

During invoice and sales order entry (Processes > Sales > Customer Invoices or Customer Invoices (Detail)) and (Processes > Sales > Sales Orders), many fields are available in the data entry grid. If you included all of the available fields, you would need to scroll left/right to view each of them. Another option is to display the Information Grid at the bottom of the screen. You can then select which fields display in the normal data entry grid (normally just those that you need to enter information into) and which fields display in the Information Grid at the bottom. The Information Grid will display additional information regarding the line that is selected in the data entry grid. To display the Information Grid, click the Options button and then select Show Information Grid. The grid can be customized to display all columns (except for button type columns) that the standard data entry grid displays, but they will be read-only. The grid can also be resized and will be saved so that the next time the screen is displayed the same columns are displayed on the read-only grid.



Scanning and Attaching Documents

Files can be attached to the following setup screens: Customers, Vendors, Names, and Employees or the following Transaction screens: Purchase Orders, Payments, Vendor Invoices(A/P), Sales Orders, Receipts, Customer Invoices (both basic and detail), and General Journal Entries. Files can be attached by scanning the documents, dragging and dropping existing files from your computer, or by selecting an existing file from your computer via the Scan and Paperclip buttons..

For detailed information about attaching documents to transactions, see the Scanning and Attaching Documents topic.