

# 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, SHIFT + ENTER, or ↑
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 (W2, 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

## 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 > <b>Add Worksheet</b>
Add Reminder	CTRL + R
Open the Preparer notepad ( <b>PAD</b> 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 <b>Help</b>	(Within data entry, CTRL+?) or (CTRL + F1 from <b>Home</b> )
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 <b>Set Client Status</b> 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 <b>Home</b> 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 <b>PY</b> as the resident state code on screen <b>1</b> . Do <i>not</i> use <b>PY</b> 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 <b>For</b> 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.

# SOFTWARE SUPPORT WITHIN DRAKE TAX

Easily find the information you need by accessing support resources directly within Drake Tax.

## 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

Help resources are conveniently organized in one location. From the **Home** window, click the **Support** button to access these options:

- **What's New**, a summary of current-year changes to Drake Software's programs and IRS tax laws
- **Knowledge Base**, an online reference containing answers to common tax and software questions
- **Program Help**, a searchable, indexed encyclopedia containing answers to common software questions
- **Support Website**, a website with links to all of our online help resources, including the Knowledge Base, and many other helpful webpages
- **Video Tutorials**, a compendium of how-to videos on using Drake Tax and related programs
- **Chat Support**, a way to connect with a Drake Software Support Representative and have your questions answered via chat
- **Manual and Online Resources**, a link to Drake Tax manuals and Drake Software shipment letters, all in PDF format, readable online or available for download
- **Custom Web Search**, a customizable Web search tool that you can use to search for keywords on multiple sites at once

## Data Entry Help

Drake Tax includes screen- and field-level helps to explain how to use the current screen, where to enter specific tax data, and how to find more information through links and IRS references.

### Screen Help

Screen helps provide information about open screens in data entry. Access screen help by pressing CTRL + ALT + ?, selecting **Help** from the data-entry screen toolbar, or choosing **Screen Help** from the right-click menu.

### Field Help

Field helps provide information about selected fields. Access a field help by clicking inside a field and pressing F1 or SHIFT + ?, or by right-clicking a field and selecting **Help > Help for this Field**.

# DrakeSoftware®

Professional Tax Solutions

For support, call (828) 524-8020 or email [Support@DrakeSoftware.com](mailto:Support@DrakeSoftware.com)