

## Getting the most from TBS

**Note:** These instructions are designed for the 'Full' menu of TBS CleverPLUS.

**Note:** A 'field' is a text box, dropdown box, tick/check box.

**Note:** A 'record' is one set of data, for example one invoice or one customer is a record.

### Data entry tips for TBS accounting products:

- Press TAB/ENTER on your keyboard to get to the next field. Our software is designed to take you through a logical order of data entry. Press TAB/ENTER to get to the next step.
- Press Shift+TAB on your keyboard to go back to the last field.
- Data you've typed in is automatically saved when you exit a screen.
- The top section of data entry screens often contain ways to look up information that you need on that screen, for example on the invoice screen you can lookup invoices by number or customer name from the top of the screen.
- Our software has many functions for different types of businesses. If a field doesn't apply to your business just ignore it. The software will remind you if you've missed a required field.
- You can enter dates quickly by typing the day/month only, the program will assume that you mean the current year. E.g. "14/02" becomes "14/02/2008" automatically.
- Press F2 on your keyboard to edit a field when you TAB/ENTER into it.
- Press F4 on your keyboard to use a drop down menu without the mouse.
- Press Shift-F2 to zoom on a text field (box). This gives you a better view when entering lots of data.
- Look for underlined letters on the labels of buttons. When you see an underlined letter you can press ALT+(the letter) to activate that button. For example: press ALT+X on most screens to exit that screen.
- Double click on fields like 'Product Code' or 'Client No' after selecting one. This will take you to the screen for that item. For example try selecting a client in the quote or invoice screen, then double click on it – the 'Customer Details' screen will open.
- Records: on any data entry screen you will see a record selector at the very bottom of the screen. These buttons let you jump to the first record, last record, back one, forward one or you can type the record you want to go to. For example: on the invoice screen you can type the invoice number in the record selector at the bottom left hand corner and press enter to jump straight to that invoice.
- Scroll the mouse scrollwheel on any data entry screen to browse through the records. Scrolling away from you counts down to 1 and towards you counts up.
- Pressing PageUp or PageDown on your keyboard moves you forward or back one record at a time.

- Every field in your TBS software can be searched. Click on the field you want then click the binocular icon on the top menu bar. You can search for partial match of a field or an exact match.
- For power users we can also recommend the filtering system on the top menu bar. This will allow you to filter the available records. For example on the invoice screen you could find an invoice for a certain client and then click 'Filter by selection' (when your cursor is on the 'Client No' field) on the top menu bar (the icon is a funnel with a lightning bolt on it). This will limit the records you see to only that client. Don't forget to press the 'Remove Filter' button (the icon is a funnel with a red cross on it) to see all records again.

**Shortcuts in the TBS CleverPLUS program:**

- CTRL+SHIFT+I     Open invoice screen.
- CTRL+SHIFT+B     Open the banking/receipts screen.
- CTRL+SHIFT+P     Open the payments screen.
- CTRL+SHIFT+O     Open the purchase order screen.
- CTRL+SHIFT+J     Open the job cards screen.
- CTRL+SHIFT+S     Open the products screen.
- CTRL+SHIFT+D     Open the customer details screen.
- CTRL+SHIFT+M     Open the membership in/out screen.
- CTRL+SHIFT+G     Open the gift vouchers screen.
- CTRL+Y            Open the stock holdings/pricing screen.
- CTRL+Q            Moves to quantity in POS checkout screen.
- CTRL+W            Moves to unit price in POS checkout screen.
- F6                 Print sales docket when in POS checkout screen.
- F7                 Moves to tendered in POS checkout screen.
- F9                 Moves to the last sale in POS checkout screen.
- F10                Unlock price editing in POS checkout screen.
- F11                New sale in POS checkout screen.
- F12                Exit the POS checkout screen.