Keyboard Shortcuts

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Add a transaction, upload docs, jump between pages, and page through a preview from the keyboard.

Introduction

A few moves come up all day: starting a transaction, uploading documents, opening the edit page for the transaction you're viewing, and switching between *Home*, *Tasks*, *Unassigned*, and the rest of the top menu. Keyboard shortcuts do each of those with one key combination.

Those shortcuts are the same pair of modifier keys plus one letter or number, and only the modifier pair differs between Windows and Mac. The numbers follow the top menu in order, so the number you press is the spot you'd have clicked. Inside a doc preview, the arrow keys page through the document.

How It Works

Adding and navigating use a modifier combo plus one key. Only the modifier changes between platforms.

Windows vs. Mac

On Windows, hold `Ctrl` + `Alt`. On Mac, hold `Ctrl` + `Option`. The final key is the same on both.

Quick Add

Add a transaction or upload docs from anywhere, and open the edit page of the transaction you're looking at.

Action	Windows	Mac
Add a transaction	`Ctrl` + `Alt` + `T`	`Ctrl` + `Option` + `T`
Upload docs	`Ctrl` + `Alt` + `D`	`Ctrl` + `Option` + `D`
Edit the transaction you have open	`Ctrl` + `Alt` + `E`	`Ctrl` + `Option` + `E`

Quick Navigate

Jump straight to any top-menu page. The number matches the menu order, and Z takes you to Admin / Settings.

Go to	Windows	Mac
Home	`Ctrl` + `Alt` + `1`	`Ctrl` + `Option` + `1`
Transactions	`Ctrl` + `Alt` + `2`	`Ctrl` + `Option` + `2`
Tasks	`Ctrl` + `Alt` + `3`	`Ctrl` + `Option` + `3`
Unassigned	`Ctrl` + `Alt` + `4`	`Ctrl` + `Option` + `4`
Unreviewed	`Ctrl` + `Alt` + `5`	`Ctrl` + `Option` + `5`
Reports	`Ctrl` + `Alt` + `6`	`Ctrl` + `Option` + `6`

Reference	Ctrl + Alt + 7 Ctrl + Option + 7
Admin / Settings	Ctrl + Alt + Z Ctrl + Option + Z

In a Doc Preview

Page through a doc, or move to the next one, while its preview is open. Keep your cursor outside any text field. These keys are the same on Windows and Mac.

Action	Key
Next page	→ (right arrow)
Previous page	← (left arrow)
Jump to a page	Type the page number
Open the next doc's preview	Shift + ↓
Open the previous doc's preview	Shift + ↑

Click a doc's name and it opens right there on the page — read it, page through it, and keep working without downloading a thing.

See Doc Preview

Frequently Asked Questions

Do the shortcuts work on a Mac?

Yes. Use Ctrl + Option in place of Ctrl + Alt ; the final key is the same. The doc preview keys are the same on both.

Do I have to be on a specific page for them to work?

For most of them, no. Adding a transaction, uploading docs, and jumping to a top-menu page work from any page. Editing needs a transaction open, and the doc preview keys work while a preview is open.

What can I do with the shortcuts?

Add work, move around, and page through docs. Quick-add starts a new transaction or a doc upload, or opens the edit page of the transaction you have open; quick-navigate jumps to any top-menu page; and in a doc preview, the arrow keys move between pages and docs.