NewViews 2 and NewViews NPH - Tips and Tricks 2018/2019

This document is a compilation of NewViews Tips and Tricks that were published in the QW Journal throughout 2018 and 2019.

Today's date shortcut

A quick and easy way to insert today's date into any date field in a set of books is to type the letter **t**, then press **Enter**.

Setting a default month and year in the Date field

For most date entries, you only need to type 1 or 2 characters for the full date. **F12** sets the default date in a date field. When starting entries for a new month, type the full date (e.g. 01042017) then press **F12**. This will store April 1, 2017 as the default date. When a new transaction is added to the same table, the default date will appear automatically. To enter a different day in the same month, simply type the day's number in the date field and press **Enter**.

As each journal type has its own defaults, you will need to set the default date for each.

Setting, getting and clearing defaults

As described above, defaults can be set for dates, and they can also be set for descriptions. For example, in the Bank Deposit journal, most transactions are "Deposits". If you place the cursor on a description field that has "Deposit" and press **F12**, the next time you enter a new transaction in the Bank Deposit journal, the description will automatically be set to "Deposit".

- [F12] - **Sets** the column default

  This performs the same function as the Edit>Default Value>Set command. It sets the column default to the value of the current cell. When a new row is added to the table its value in the current column will be set automatically to the default value.

- [Shift+F12] - **Gets** the column default

  This performs the same function as the Edit>Default Value>Get command. It retrieves the current column default and sets the current cell to that default value.

- [Ctrl+F12] - **Clears** all defaults

  This performs the same function as the Edit>Default Value>Clear All command. It clears all column defaults for the current table.

Resize columns instantly with the Auto Fit Columns button

The Auto Fit Columns button, located on the right side of the NewViews Toolbar, instantly adjusts the width of all columns in the active table (click to toggle on and off). When this feature is on, columns are automatically resized to fit the data displayed. Many users toggle this button on to adjust the columns on the active table, then toggle it off before they navigate away. By doing this over the course of a few NewViews sessions, you will find that you have optimized the display of all the tables you access on a regular basis.

Use Bookmarks for quick access to specific destinations in a set of books

For quick access to frequent destinations in your NewViews books, use the Bookmarks button in the NewViews Toolbar. To bookmark any position, view or window arrangement, click Bookmarks, choose Add, then enter a name and description for the bookmark. To return to that position/view/window arrangement at any time, all you have to do is click Bookmarks and choose the name from the drop down list.

Set a default view anywhere in your books using the Pin Default View button

The Pin Default View button, located on the right of the NewViews Toolbar, can be used to set (pin) a preferred view anywhere in a set of books. Example: If you go to your Trial Balance report, the view displayed would normally be whatever view was used for the last report you visited (e.g. Multiple Period Analysis or some other view). To set the Trial Balance view as the default view for the Trial Balance report, click the Pin Default View button to turn it on (the pin icon will push down). That way, you'll see the Trial Balance view every time you go to the Trial Balance report.

Change the default behaviour for tax calculations on purchases

There is a little known setting for the Purchase journal that can be used to change the default behavior of purchase transaction tax calculations. A setting called "Purchase Item Entry Mode" can be found on row 16 in "User Options" (under System). This option can be set to fixed_item_total or floating_item_total. The fixed_item_total option locks the **Item Total** value. In other words, the item total will not change if the tax field is adjusted. In these cases, the value in the amount field is increased or decreased automatically to accommodate any change made to tax.

Split the Amount column on account ledgers into Debits and Credits

On most account ledgers, the standard view has a single amount column beside the running balance (Amount Total) column. To split the amount column into debit and credit columns, issue the **View** command and choose **Amounts Only – Dr/Cr Split**. You can return to the standard view at any time by using the **View > Amounts Only** command.
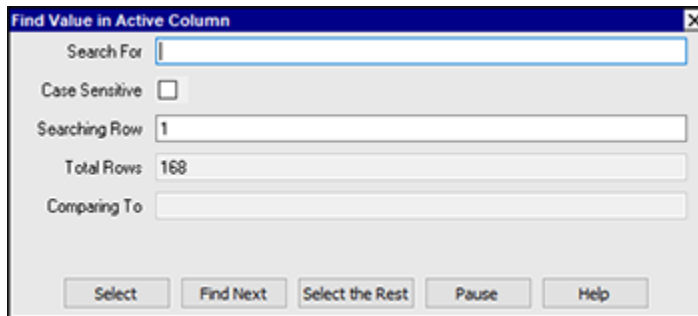
Change the order of columns

You can move columns in a table to the left or right by clicking anywhere in the column, then pressing **Ctrl + ⇐** to move the column left or **Ctrl + ⇒** to move the column right. In this way, you can easily arrange columns to suit your preference.

Note: If you move columns on a ledger and then change the view of the ledger (e.g. change the view from **Amounts Only** to **Amounts Only - Dr/Cr Split** as described in the tip above), columns that have been moved will revert to their original position. If you move columns on any other kind of table (e.g. a table of accounts or a report), those columns will maintain their new position if you switch to another view and then switch back.

Find a specific sequence of characters in a column

The **Go to > Find Column Value** command can be used to find a specific string of characters in the active column. When this command is issued, the following prompt box appears:

The characters entered in the **Search For** field will be matched if they appear anywhere in the active column. For example, searching for "deposit" with match "Funds deposited in trust".

Changing the "Total Due At" date on Invoice and Order Aging views

The "Total Due At" date used for **Invoice Aging** and **Order Aging** views is set using **User Options** (under **System** in the Database Explorer). Administrators and users with authorized access can change this date by navigating to **User Options** and entering the desired date in the "Report As Of Date" field.

NewViews function keys

Looking for a chart that tells you what each function key does in NewViews? Choose **Help > Keyboard** from the menu bar to access a comprehensive chart of function key designations and other keyboard shortcuts.

Converging on items

Converging on items enables you go to straight to specific items on tables with many rows by just typing a few characters (e.g. the first few characters of the name or description).

Clicking a column title will sort the items by that column (if the column can be used for sorting). With certain columns, you also have the option of clicking the title while pressing the **Ctrl** key. If **Ctrl+click** is allowed, the sort order changes as usual, and the column is highlighted. When a column is highlighted, you can converge quickly on a specific item.

Example: Converging on an account by name

Ctrl+click the title of the **Name** column to highlight it; all items are ordered by name (if they weren't already) and the column is highlighted. Start typing the name of the account you're looking for. As you type, you will converge on account names matching the sequence of characters. Let's say you're looking for the account name SMITH - if you type the letter s and you go directly to the first account name starting with s. If you continue to type the letters m and then i, that will likely be enough to quickly converge on the SMITH account. Typically, you only have to two 2-4 characters to find the items you are looking for.

Pressing **Backspace** will reverse the proccess keystroke by keystroke if you type the wrong character by mistake. Or, you can press **Home** or just move the cursor to another row to start the process over.

When you reach the desired account, be sure to **Ctrl+click** the column title again to turn off the highlighting.

Note: This technique can be used to quickly move to a posting with a specific date. When converging on a date, it must be entered in the format YYYYMMDD format.

Press [F2] to go to an account

To go directly to any account in your books, press **F2** and start typing the account name in the select box. It should only take a few characters to position on the account you want, then press **Enter**. Note: If you're not sure of the account name but know the description, you can switch to the description column in the select box and start typing the account's description instead of its name.

Dealing with an "Unauthorized Version" installation error

Trying to install a recent NewViews update but getting an error that says you're attempting to install an unauthorized version? This generally means your Upgrade Plan expired on or before the day the update was released. If you have renewed your plan since then, call Tech Support at 905-946-9460 and re-register your NV2 or NewViews NPH workstation (it only takes a few minutes). To avoid this problem, be sure to renew your Upgrade Plan at least 1 week before it is due to expire!

Shortcuts for entering dates in the future or past

Many users know that you can type the letter **t** in a date field to enter today's date. But did you know that you can also use date arithmetic to quickly enter dates in the future or the past? For example, type **t+1day** to enter tomorrow's date, type **t+1week** to enter a date 1 week from today, type **t+1month** to enter a date 1 month from today, or type **t+1year** to enter a date 1 year from today. To enter dates in the past, you can subtract instead of add. For example, type **t-1day** to enter yesterday's date, type **t-1month** to enter a date 1 month ago, etc. You can also use multiples - e.g. to enter a date 3 days from today, type **t+3days**.

Automatic bank reconciliation

Did you know that NewViews offers automatic bank reconciliation? This powerful feature is an incredible timesaver. To learn how to use it, check out our updated tutorial video here.

Retrace your steps using breadcrumbs

As you navigate through a NewViews set of books, a trail of up to 100 'breadcrumbs' are set each step of the way. Once this maximum is reached, the oldest breadcrumb is removed, keeping the trail length at 100. Importantly, these breadcrumbs persist from one work session to another - you can close your books and come back to them and still retrace your steps.

The navigation buttons at the left of the Toolbar make it easy to move backwards and forwards through your breadcrumb trail:

- Back - Retrace your path, one position/view at a time
- Forward - Reverse direction and return, one position/view at a time
- Forward End - Reverse direction and return immediately to the position/view where you first used the Back button

Quickly tidy up your Database Explorer tree

In the course of working on various sections of your books, it's easy to wind up with many expanded folders in your Database Explorer. This clutters your NewViews desktop and can cause you to hunt for your next destination. Tidy up your explorer tree in an instant by clicking the Home button in the Toolbar, followed by the Back button. Clicking Home collapses the Database Explorer and clicking Back puts you exactly where you were before you clicked Home, but now the only expanded folders will be those corresponding to your current position.

'Click away' to save time dismissing prompts

If a prompt box is displayed on your NewViews desktop and you want to dismiss it, click on the underlying table or document visible outside the boundaries of the prompt. This will dismiss the prompt automatically; it is not necessary to click the X in the top right corner. (Note: This does not apply to error messages, which must be acknowledged.)

Change your computer's power settings to avoid lost connections with a NewViews Server

If you use NewViews in a multiuser environment and lose your connection to the NewViews server when you leave your workstation for a short period of time, you may have to prevent your computer from 'going to sleep' when you step away.

To change this in Windows 10, go to **Settings**, choose **System Settings**, then choose **Power & Sleep**. Change the settings for **PC goes to sleep after** to something longer than the time you are normally away from your desk, or turn the sleep option off altogether by choosing **Never**.

Increase/decrease the size of text in NewViews tables

Do you find yourself squinting to read the information in NewViews tables? You can quickly increase or decrease the size of text by holding **Ctrl** while moving the scroll wheel on your mouse.

Stop distribution items from 'jumping around'

When you're entering multiple line items in a distribution, do they 'jump around' as you enter them? Chances are that you (or someone with access to your workstation) has inadvertently changed the sort order from **Line** to **Comment**. You can confirm this by checking for a chevron to the right of the **Comment** column header.

Details	Additional Info		Customer Ledger	Customer Address	Customer Ship Address			Customer Extra Addresses	+	Notes
Line	Item	Item Description	Comment (v) ←	Amount	H.S.T.	n/a	Item Total	Total		
1	OS-C	Operating System Course	Course fees	295.00	38.35	0.00	333.35	333.35		
2	PFEES	Programmers Fees	Custom programming	600.00	78.00	0.00	678.00	1,011.35		
3	OS	Operating System	Operating system	320.00	41.60	0.00	361.60	1,372.95		
4	MCK-670	Computers - McKinley 670	Standard configuration	3,756.00	488.28	0.00	4,244.28	5,617.23		

The fix is simple: Click the **Line** column header to resort the items by line number.

Details	Additional Info	Customer Ledger	Customer Address	Customer Ship Address			Customer Extra Addresses	•	Notes
Line ⊽ ⬅ em		Item Description	Comment	Amount	H.S.T.	n/a	Item Total	Total	
1	MCK-670	Computers - McKinley 670	Standard configuration	3,756.00	488.28	0.00	4,244.28	4,244.28	
2	OS	Operating System	Operating system	320.00	41.60	0.00	361.60	4,605.88	
3	OS-C	Operating System Course	Course fees	295.00	38.35	0.00	333.35	4,939.23	
4	PFEES	Programmers Fees	Custom programming	600.00	78.00	0.00	678.00	5,617.23	

Print or email receipts directly from NewViews

The ability to print or email receipts from NewViews was introduced in version 2.33. Receipts can be generated from a bank deposit journal, bank ledger, general journal, general ledger or an AR ledger by positioning on simple transaction or distribution item (for complex transactions) and issuing the **Print>Receipts** command.

Having trouble installing a NewViews update after downloading?

When you download an update from our website, it's typically saved in your **Downloads** folder. But in some circumstances, executable files (.exe) are blocked from running from that location. In this case, copy the NewViews update file from the **Downloads** folder to your NewViews folder (generally **nv2** for NewViews 2 or **nv2_nph** for NewViews NPH). Once the update file is copied, you can run it from its new location in the NewViews folder.

Have your function keys suddenly stopped working?

Function (Fn) keys perform many useful tasks in NewViews, so it can be very inconvenient if they stop working. To be specific, they still work as intended but only if you press **Alt** with any given function key. If this has happened to you, you have probably locked the function keys on your keyboard accidently. Scan your keyboard for two keys: the **Fn** key and another key with a tiny lock icon and the characters **Fn**. Pressing these keys together accidently locks your function keys so they perform the alternative function by default (e.g. increase your speaker volume or brighten your screen). Pressing these keys together again unlocks them so your function keys perform as expected.

Navigation 'switches' with F9 and Ctrl+F9

F9 (Journal/Ledger Switch): If you're positioned on a journal transaction (pink table), pressing **F9** switches you to the corresponding posting on an account ledger (green table). If you're positioned on a posting in an account ledger, **F9** switches you to the corresponding journal transaction. **Note:** As a journal transaction can post to several accounts, the account you switch to depends on the current field. For example, if you're positioned on the debit account field when you press **F9**, you switch to the posting on the debit account; if you're on the credit account field, you switch to the posting on the credit account.

Ctrl+F9 (Go to Cross Account): If you're positioned on a posting on an account ledger, you can switch directly to the ledger of the cross account by pressing **Ctrl+F9**.
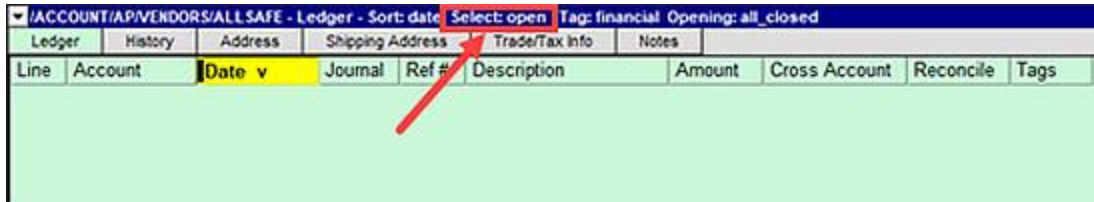
Keyboard shortcut for Windows Task Manager

On occasion, you have to access the Windows Task Manager to stop a process (e.g. if you have a different version of TeamViewer running when you contact QW Page Technical Support). You can access the Task Manager instantly by **Ctrl+Shift+Esc**.

Transactions missing from ledger

Have some or all transactions disappeared from a ledger? Don't panic - you or someone who uses your workstation may have changed the ledger view.

In the example above, the ledger appears empty, but if you check the view on the title bar, you can see it has been set to "open". This means that only open (unreconciled) transactions are currently displayed. To see all the transactions, use the **View > Ledger** command.

Can't maximize NewViews window from taskbar

Some users have been experiencing a Windows glitch that prevents them from maximizing a NewViews window after it has been minimized. To resolve this issue, hover over the NewViews icon on the taskbar to see a small preview of the window, then right click on the preview and choose "Maximize".

Navigate between panes using F4 and F6

With NewViews, it's essential to know which window pane has "focus", i.e. the pane in which your cursor is active. If you move your cursor, start typing, or issue a command, the pane with focus is the one that reacts to your actions. A key benefit of using NewViews is being able to view several panes at once, all displaying related data. To move quickly from one pane to another, use the **F4** and **F6** function keys. **F6** moves you through the panes in drill down fashion, from summary to detailed data. **F4** moves through the panes in reverse, from details to summary.

Note that there are three visual cues that tell you which window pane currently has focus: the title bar is dark blue, the active field has a bright yellow highlight (vs faded yellow) and the name of the active menu is displayed in the top left corner of the menu bar.

Accommodating multiple email addresses

Did you know that you can store more than one email address for customers and suppliers? For example, some of your customers may want emailed invoices to be sent to more than one address. To accommodate multiple email addresses for an AR or AP account, separate them with a comma in the **Email** address field (see below).

Tax exempt items on invoices

If a product or service that you sell is tax exempt, you can set this in the **Trade/Tax Info** tab for that sales account.

Similarly, if a customer has tax exempt status, you can set that in the **Trade/Tax Info** tax for the customer account.

What if you want to make an item tax exempt on the fly while entering an invoice in your sales or

purchase journal? After the tax has been calculated, position on the tax field and enter **0** or press the **Del** key.

Go directly to the bottom (or top) of a lengthy ledger or journal

The fastest way to go directly to the bottom or top of a NewViews document (e.g. a ledger or journal) is to press the **End** key followed by the **PgDn** or **PgUp** key.

The **End** key can also be used to amplify movement as follows:

End → takes you to the last column on the table
End ← takes you to the first column on the table
End ↓ takes you to the last row on the screen
End ↑ takes you to the first row on the screen

Did you know a calculator is embedded in all numeric fields?

In NewViews, all numeric fields have an embedded calculator. This means you can type a mathematical expression and the result will automatically be calculated and entered in the field. For example, if you type 2.5*3 in a numeric field, the value 7.5 will be entered. You can also use parentheses for more complex calculations. For example, if you type (2+3)*7, the value 35 will be entered.

Setting Automatic Reference #'s for Sales Invoices

You can have NewViews provide sequential reference numbers for sales invoices using the **Settings** view of the Sales Journal.

As shown above, simply enter a value in the **Next Ref #** field on the **Settings** view. You can also use this view to enforce unique reference numbers. Once the **Next Ref #** has been set in this way, pressing **F3** on the **Ref #** field of a sales invoice will offer up the next available reference number.

Using automatic reference numbers for sales invoices is a great way to ensure that all invoices are accounted for (i.e. reference numbers are sequential and none should be missing). To be used as a control in this way, however, invoices that are cancelled should be voided and not deleted.

Note: Automatic reference #'s for entries in any journal can be set in this way.

"Freezing" Title Columns on Wide Reports

If you are scrolling through a wide report with many columns (e.g. a multi-year analysis of an income statement) and want to "freeze" the **Description** column on the left for reference, position on that column and issue the **Window > Title Columns > Set** command. This will ensure the **Description** column (and all columns to the left of it) remain visible as you scroll to the right. To "unfreeze" columns set in this way, use the **Window > Title Columns > Unset** command.
Have your window tabs disappeared?

Looking for the view tabs that are normally displayed across the top of a window but are now missing?
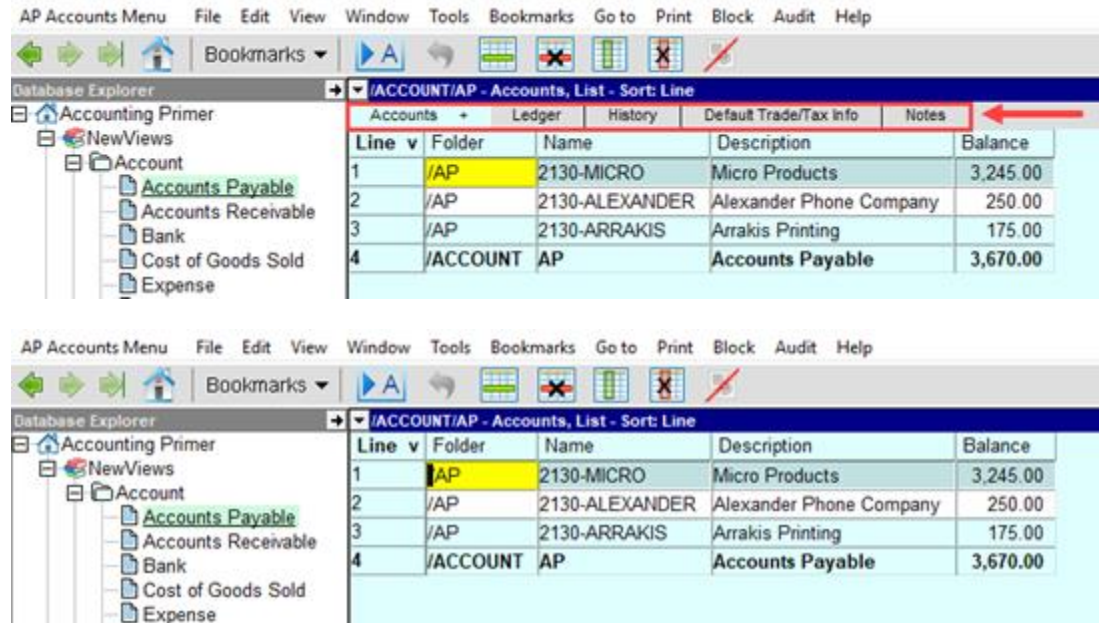
Windows tabs can be hidden using the **View > Windows Tabs > Hide** command. To bring them back, click anywhere in the window to make sure it's active and issue the **View > Window Tabs > Display** command.

Dealing with the printing error "wrong parameters"

If Excel is running in the background and crashes without any outward indication, you may encounter this error when you try to print from NewViews.

To correct the issue, open the Windows Task Manager (**Ctrl+Shift+Esc**), make sure you're on the **Processes** tab, then locate the **Microsoft Excel** application. Right click on this process and choose **End Task**.

If these steps do not resolve the printing error, you may have to restart NewViews as well.

How can I get my RGI calculations to print on one page? (NewViews NPH)

RGI calculations can be printed directly from the member/tenant account on the **Rent Summary** view using the **Print > RGI Calc** command.

RGI calculations can also be printed from the **Calc Summary** tab, which is found in the detail panes connected to **RGI Info** on the **Rent Summary** view. When this tab is active, the RGI calculations are printed using the **Print** command.

In either case, the calculations are printed through your web browser. To force the calculations to fit on one printed page, be sure to choose **Preview** to preview the results in the web browser before printing. You can then use the web browser's print options to reduce the print scale until the calculations fit on one page.
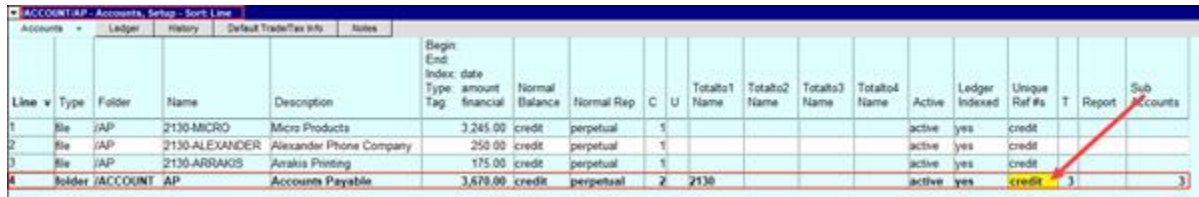
Mini Reference Guide for NewViews NPH

A mini reference guide is now available for NewViews for Non-Profit Housing users. This one page resource provides direct links to topics in the NewViews NPH User Guide that are very useful to new users. To obtain the guide, click here and save the downloadable PDF to your computer.

Setting up alerts for duplicate purchase invoices

Wishing that NewViews would alert you if enter duplicate purchase invoices in the Purchase Journal? It's actually very easy to set this feature up.

1. Go to your **Accounts Payable** table.
2. Switch to the **Setup** view.
3. Position on the **Unique Ref #s** field on the **Accounts Payable** row.
4. Press **[F3]** and choose **credit**.

NewViews will attempt to apply this setting to all AP accounts. When applied successfully, it will cause a warning to be displayed if you attempt to enter a purchase invoice with a reference number that is identical to an existing invoice for that vendor.

If an AP account already contains invoices with duplicate reference numbers, you will be notified. You will then have to go that account and locate the invoices in question. We suggest adding suffixes to the reference numbers for those invoices (e.g. -B or -2) to differentiate them. Once this has been done, you can return to the **Setup** view and enter **credit** in the **Unique Ref #s** field for that account to prevent duplicate invoices in the future.

Mouse shortcuts for marking blocks

Did you know that you don't have to use the **Block > Start** and **Block > End** commands to mark blocks on a NewViews table?

- **To mark a block of sequential rows:** Hover over the first row and click the left mouse button, then hover over the last row and hold the **[Shift]** key while you click the left mouse button.
- **To mark a block of non-sequential rows:** Hover over each row to be added to the block and hold the **[Ctrl]** key while you click the left mouse button.
- **To remove a row from a marked block:** Hover over the row to be removed and hold the **[Ctrl]** key while you click the left mouse button.