



# Chuck's Top 50 Favorite Tips Collected for You

*Note: The purple parenthesis reference a keyword that you can search for to locate a webinar or help topic that expands on this tip. W:= search within Webinar Archive and H:= search within OnLine Help Guide*

## Operation Tips

- Use the Online Help Guide!  
Regularly Read the “What’s New” section (for BOTH Manager and ACEweb) (H: [What's New](#))
- Participate in our List Serv and subscribe to the ACEware Newsletter and Forum.
- Browse “the shelves” in Webinar Archive to see what helpful topics you missed. Know how to SEARCH for Keyword in Title/Description.
- Add “*What I Learned About Student Manager*” as an agenda item to your monthly staff meetings.

## System Tips

- Press F1 to see (and remember) the Shortcut Keys ( F2 – Quick List, F5 – Name Finder, F7 – Pay Grabber and F9 – Dashboard are my favorites ) (W:[Shortcut](#)) (H: [Shortcut](#))
- When in a data entry screen, **any** button will save your changes, except ESC, UNDO, or ABANDON. You don't have to hit SAVE before doing OK/Close or Find or any other button.
- Code Edit – Want to know who got the code? Within Code Edit, click the Show (Name/Reg/Course) button
- In the new FIND Screens, clicking on ANY column header will sort that list (by Upsie or by Downsie)

## Course Tips

- Use the Send Student Reminder of Upcoming Course emails! (Turn this preference on in Course Preferences)
- Holiday Dates: Periodically update your holidays (BEFORE you begin scheduling classes)
- From Student List view, You CAN EDIT the hours, grade, rgcode, regstatus and reg notes for students.
- To turn on/off the Time/Location change warnings, go to Course Preferences and check/uncheck the Warn on time/loc change box. (Also you can choose what data “clones” when Cloning Courses)
- DEACTIVATE your old/past Courses! To mass change their status (Active, Locked, and Web Publishing) use the Module | Courses | Mass Change/Update/Delete option. (H: [Mass Change](#))

## Instructor Tips

- Set the default pay type (H=Hourly, S=Student) and Pay Rate in Additional Info (UDFS).
- **NEW FEATURE:** Create an instructor from a student record (and vice versa) (From Student use ALT + Y shortcut key)
- Have LOTS of instructors? Enable Subject Scoping (viewing Instructors) in Course preferences to only display qualified instructors. (Matches Instructor Interest Code to Course Subject Code)  
(H: Scoping)
- ACEweb Users: ENTER in an Instructor Bio and add a picture! Your ACEweb course display will be look way more professional and complete!

## Location Tips

- To analyze class performance by location, enter the code (region code or geographic area) in the Location/Room ID # code. Course Statistical Reports also allows you analyze by that field as well as the City, State and County fields!

## Name/Firm Tips

- Searching Names: Keep 'Search Fields on Begins With' checked for faster performance.  
(H:Optimizing)
- Searching for long names: ( i.e. Meriwether Matthewson ) Use 3+3. Type in 3 letters of last name, a space, then 3 letters of first name (Mat Mer will jump you there PDQ)
- Use the Name Clone Feature: By default the address of last name added/edited is saved. To clone that address to a NEW name record (a spouse, family member or fellow employee) press Alt+V.  
(H: Clone Name)
- If you are using Additional Info (user defined) data fields, you may display UDF data on the Name Screen. (H: Displaying UDF)
- Copy address to Clipboard (to paste to other documents) Alt+3 will copy full name information to the clipboard, Ctrl+V or Paste will paste it anywhere you want! (Alt 3 ALSO works with Instructor and Course screens)
- Print label field is a great tool to track requests for Catalog/Brochure Mail out requests. (H: Print Label)
- Use the Fee Category to specify a default registration rate (e.g. person should always get Senior Citizen discount). (H: Fee Category)
- **NEW FEATURE:** Firm Escrow: move escrow WITHIN / AMONG students from same firm  
(H: Firm Escrow)

## Registration/Payment Tips

- Use the Tracking Code on Registrations! (unless you have unlimited marketing budgets)  
(H: [Tracking Codes](#)) ( Report results in Statistical Reports / Tracking Codes)
- **NEW FEATURE:** ALT+Z (Speed Registration Entry) now supports FIRM LEVEL Mass Registration.  
(H: [Speed Register](#))
- View a person's Pay History by pressing Alt+F9 from the Names or Registration screen.
- Use the Clone Pay Detail button to paste information from the last payment entered into a new payment record.
- **NEW FEATURE:** Use Reinvigorate Invoice (new on Pay Screen) to void existing invoice and make new one. (H: [Reinvigorate](#))
- If Billing (a non-grouped registration) you may create a Payment Plan (Payment Plan Button)  
(H: [Payment Plan](#))
- **NEW FEATURE:** New Preference in Registration: Turn on "Quick Cancel Registration" and if registration has no valid payments, it automatically cancels the registration and zeros out hour and CEUs. (You won't get the "Mother May I?" prompts)

## Query Tips

- Use the Alt+F2 key to recall the last value entered in a character query field into another query.
- The Alt+F1 key captures value of last course code entered/edited, either via Query or by editing Course/Reg. (then paste it by pressing ALT + F1)
- If you have a multi-screen query list, right click to get the "filter" option.
- To search for an area where you can query for a specific field, use the Search Query for Field option (in Tools | Reports).
- **NEW FEATURE:** In Creating Query, Right Mouse Click on field description to get Exact Field Name

## Report Tips

- To get an inventory (and use information) on all reports in your system, print the Reports | Accounting | Special 1 Reg/1 Line (Deadbeat) | NEW-All Reports w/Memo report.
- Need updated reports? Download a new demo and swipe 'em or go to Report Templates (under Customer/Student Manager Resources on [www.aceware.com](http://www.aceware.com)) ALSO: Don't forget about "Top Reports" in the "Guides, Manuals and White Papers" section.
- Utilize the "Favorite Reports". NOTE TO KOF's: You can set up Favorites for your users (via Password Maintenance screen) (H: [Favorite Reports](#))
- To locate a specific report by contents, use the Search Report by Keyword option (in Tools | Reports).
- If you are modifying reports, INCLUDE EDITING NOTES in the Comments (that-a-way you'll HAVE some keywords/notes you can use the above tool to search for !!!)
- Explore the statistical reports!!! (Webinar Archive has several helpful refresher videos on them)  
(W: [Statistical](#))
- Clean up duplicate/practice reports and de-activate reports you don't use (just remember to RE-Activate them when/if you are searching for reports).

- DEADBEAT Reporting Area: Chuck's Fav! The MOST generally applicable area for registration level information and exporting! ( It's even got a special shortcut: ALT + D )
- Use the Zipradius function to focus on names within a NN mile radius of a program site (W:ZipRadius)
- Revert to Default Report: If you checked Additional Report, but decide you wanted to run the default report instead, press ESC when the Select Additional Reports window opens.
- To browse reports within an area (to see what they look like), check the Recycle Query box on the Printing Options screen.

### General Maintenance Tips

- **NEW FEATURE:** Duplicate Names Tool: Use it! (now w/the ability to exclude known "False" duplicate) (H: Combining Names)
- On Codes: DE-activate those that are no longer current. (Use Data Cleanup / Codes)
- Backup your Data! It is always good to have a "Backup Parachute" (H: Backing Up)