ASSET KEEPER PRO - QUICK ADD with CATEGORIES

Quick Add with Categories option

The Quick Add with Categories option is in the Assets menu.

🚟 Sample Data File	- December 31, 2013 / Asset Keeper Pro (Subscription Expires 12/31/2014)	
File Edit Assets	Calculate Reports Housekeeping Help	
File Manag	sset Listing dd / Edit Assets Asset Listing Add/Edit Calc Annual Calc Monthly Reports Reset Update Calculator uck Add with Categories	Pelp Exit
Client F 🛛 🖓 Qı	luick Edit	
Q	uick Fix 3 -	
Au	uto Assign TA\SampleDataFile.akp	
Ad	ccount Setup	
- Ca	ategories Setup	
Tr	racking Setup	
Method Def	Method Convention Sec 179 Exp Limit Sec 179 Acq Limit Federal Std Conventions Applied 500,000.00 2,000,000.00 Adj Curr Earn Std Conventions Applied 500,000.00 2,000,000.00 Book Std Conventions Applied 500,000.00 2,000,000.00 Book Std Conventions Applied 0.00 0.00 boots View Asset Summary View Section 179 Summary View Mid-Quarter Summary View Bonus Summary	
		How To?
	Version I	Date 5/13/2014 3:23 PM
Quick Access		
Quick Sea	arch: Cost	
Favorite Rep	ports: Asset Depreciation Report	

Quick Add with Categories screen

The Quick Add with Categories screen is shown below.

The best way to think of this screen is an abbreviated Add / Edit Assets screen. Instead of multiple tabbed sections, there is just one page. Of course, there is a lot of information that can not be entered using this option, such as, notes, documents, pictures, auto mileage, asset tracking, and construction in progress.

Nevertheless, if you are entering a number of similar assets, this option is much faster than using the Add / Edit Assets screen.

The asset displayed (if you have assets in your file) will be the last asset added. To add a new asset, just click the Add button at the bottom of the screen.

To duplicate the last asset added, click the Dupe Asset button.

The asset that will be added will be assigned the depreciation methods and lives based on the Category selected. In the screen below, the Default category is selected.

Sample Data File - Dece	mber 31, 2013 - Quick Ad	dd w	th Categories				
ile Edit Help							
Category	DEFAULT		▼	(Categories		
Description #1	Test Asset			D	upe Asset	Click this button	to add a
Description #2						new category of	r select a
Acquired	05/01/2013	\checkmark	New Property? 🛛 📝 Take Bonus?			different d	one.
Cost	10,000.00)					
Listed Code	Auto		Tax methods only - all others will be Not Listed		Assign to ALL me	thods	
Asset A/C#	100	୍	Vehicles			(and a second	
Expense A/C#		୍				Category	selected
Accum. A/C#		୍					
Sort Code 1		୍କ			Category	DEFAULT methods and live	5
Sort Code 2		୍			Method	Depr Method	Life
Sort Code 3		୍			Federal	MA200	7.0000
Sort Code 4		୍			Alt. Min. Tax	NONE	7.0000
Sort Code 5		୍ଦ୍			Adj Curr Earn	NONE	7.0000
Sort Code 6		୍ଦ୍			(These methods a	nd lives will be assigned to v	our asset
Sort Code 7		୍କ			(mese memous a	na nves win be assigned to y	our asset.)
Sort Code 8		୍କ					
User Defined #1				୍କ			
User Defined #2				୍			
Valuation	0.00)					
Pers Prop Valuation	0.00)					
Goto Asset Listin	g Go	oto A	Use these buttons to go Edit Screen. The ass automatic	to th et dis cally s	e Asset Listing c played above w selected.	or Add / ill be	How To? Cancel

Adding Categories

When you click the Categories button, the Categories screen will be displayed.

Shown below is the Categories screen after the Add button has been clicked and we have entered a new category for Vehicles with depreciation methods and lives that we want assigned whenever we add an asset using this category.

🗱 Sample Data File - December 31, 2013 - Categories				x
File Edit Help				
Category Name (1 categories)	Vehicles			
DEFAULT	Category Name			
	Use this for any assets wh	ere the Listed Code is Auto or Trucks/Va	ins.	_
	Notes			
	0	Reset		
	Assets added using this ca	tegory		
		Method	Lif	e
	Federal	MA200 - MACRS Personal	- 5	•
	Alt. Min. Tax	NONE - Other	- 5	•
	Adj Curr Earn	NONE - Other	- 5	•
	Book	SLP - Book	- 7	•
+ - *-				
Created 5/13/2014 - 4:30 PM Last Modified 5/13/2	2014 - 4:30 PM	How To? Save	Cance	el 🖉

Changing categories

After you've added a new category or made changes to existing categories, you will be returned to the Quick Add with Categories.

To change categories ((the Default c	ategory is	selected in	the scree	en below) - click the	Categories
button.							

🍯 Sample Data File - Dece	ember 31, 2013 - Quick Ad	dd w	ith Categories				
File Edit Help							
Category	DEFAULT		•		Categories		
Description #1	Test Asset			_	Dupe Asset		
Description #2							
Acquired	05/01/2013	1	New Property? 🛛 🗹 Take Bonus?				
Cost	10,000.00)					
Listed Code	Auto		Tax methods only - all others will be Not Listed		Assign to A	LL methods	
Asset A/C#	100	୍	Vehicles				
Expense A/C#		୍					
Accum. A/C#		୍					
Sort Code 1		୍			Cat	egory DEFAULT methods and live	25
Sort Code 2		୍			Method	Depr Method	Life
Sort Code 3		୍ଦ୍			Federal	MA200	7.0000
Sort Code 4		୍			Alt. Min. Tax	NONE	7.0000
Sort Code 5		୍			Adj Curr Earn	NONE	7.0000
Sort Code 6		୍			(These meth	SLP	7.0000
Sort Code 7		୍			(These meth	ous and lives will be assigned to y	our asset.)
Sort Code 8		୍					
User Defined #1				୍			
User Defined #2				୍			
Valuation	0.00)					
Pers Prop Valuation	0.00)					
Goto Asset Listir	ng Ga	oto A	،dd / Edit			Add	How To? Cancel

Select a different category

Click the category you want to select in the grid. We selected the Vehicles category in the screen below. Click the Done button to use the category selected.

Sample Data File - December 31, 2013 - Categories			
File Edit Help			
File Edit Help Category Name (2 categories) DEFAULT Vehicles	Vehicles Category Name Use this for any assets whe	ere the Listed Code is Auto or Trucks/Van	5.
	Notes 0 Assets added using this cat	Reset	
		Method	Life
	Federal	MA200 - MACRS Personal 👻	5 -
	Alt. Min. Tax	NONE - Other 👻	5 -
	Adj Curr Earn	NONE - Other 👻	5 👻
	Book	SLP - Book 💌	7 -
+ - ★-	2014 - 4:38 PM	How To?	Done
			bone

Add asset using new category

When you return to the Quick Add with Category screen, the category selected will be used when adding any new assets.

Category	Vehicles		 Categories 		
Description #1	Test Asset		Dupe Asset		
Description #2					
Acquired	05/01/2013	✓ New Property? ✓ Take Bonus?	Vehicles	category is selected	
Cost	10,000.00		Venicies	s category is selected.	
Listed Code	Auto 👻	Tax methods only - all others will be Not Listed			
Asset A/C#	100	Vehicles			
Expense A/C#					
Accum. A/C#				1	
Sort Code 1				agon / VEHICLES methods and liv	
Sort Code 2		ī	Method	Depr Method	
Sort Code 3			Federal	MA200	5.00
Sort Code 4			Alt. Min. Tax	NONE	5.00
Sort Code 5			Adj Curr Earn	NONE	5.00
Sort Code 6			Book	SLP	7.00
Sort Code 7			(These meth	ods and lives will be assigned to	your asset.)
Sort Code 8					
User Defined #1					
User Defined #1					
User Denned #2]			
Valuation	0.00				
Valuation					