

Quick Edit

Home Screen

This is the Home Screen in Asset Keeper Pro with our Sample Data File selected. There are 13 assets in this file and 4 depreciation methods.

In this example of how to use the Quick Edit option, we are going to change one of the sort code fields so that it can be used in generating an Arizona personal property report. To generate the Arizona personal property report, we have to enter an identifying code in one of our sort code fields so that it can be properly grouped for the report.

We will first go to the Asset Listing to show that the Sort Code that we want to change for Arizona personal property is actually blank.

Sample Data File - December 31, 2013 / Asset Keeper Pro (Subscription Expires 12/31/2014)

File Edit Assets Calculate Reports Housekeeping Help

File Manager Open New Backup Client Info Asset Listing Add/Edit Calc Annual Calc Monthly Reports Reset Update Calculator Help Exit

Client File Selected

Company: Sample Data File - 12/31/2013

File: C:\AKPRO_Data\SAMPLEDATA\SampleDataFile.akp

Last Modified: Tuesday - April 23, 2013 1:14 PM

Assets: 13

Method	Convention	Sec 179 Exp Limit	Sec 179 Acq Limit
Federal	Std Conventions Applied	500,000.00	2,000,000.00
Alt. Min. Tax	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	0.00	0.00

Summary Reports: [View Asset Summary](#)

[View Section 179 Summary](#)

[View Mid-Quarter Summary](#)

[View Bonus Summary](#)

[How To...?](#)

Version Date 5/13/2014 3:23 PM

Quick Access

Quick Search: Cost Federal = 0.00 Search

Favorite Reports: Asset Depreciation Report

Asset Listing

This is the Asset Listing with Sort Code #5 selected as the sort order. In column 1 of the grid the contents of Sort Code #5 is displayed. Note that all assets currently have no value in Sort Code #5.

Next we will change these using Quick Edit. We will close the Asset Listing and return to the Home screen.

Sample Data File - December 31, 2013 - Asset Listing

File Edit Help

Listing Filter/Search Configure Methods Details Add Dispose Select Edit Delete Print Close

Sort Code 5 GoTo - Apply settings to Add / Edit? Show All 13 of 13 assets listed

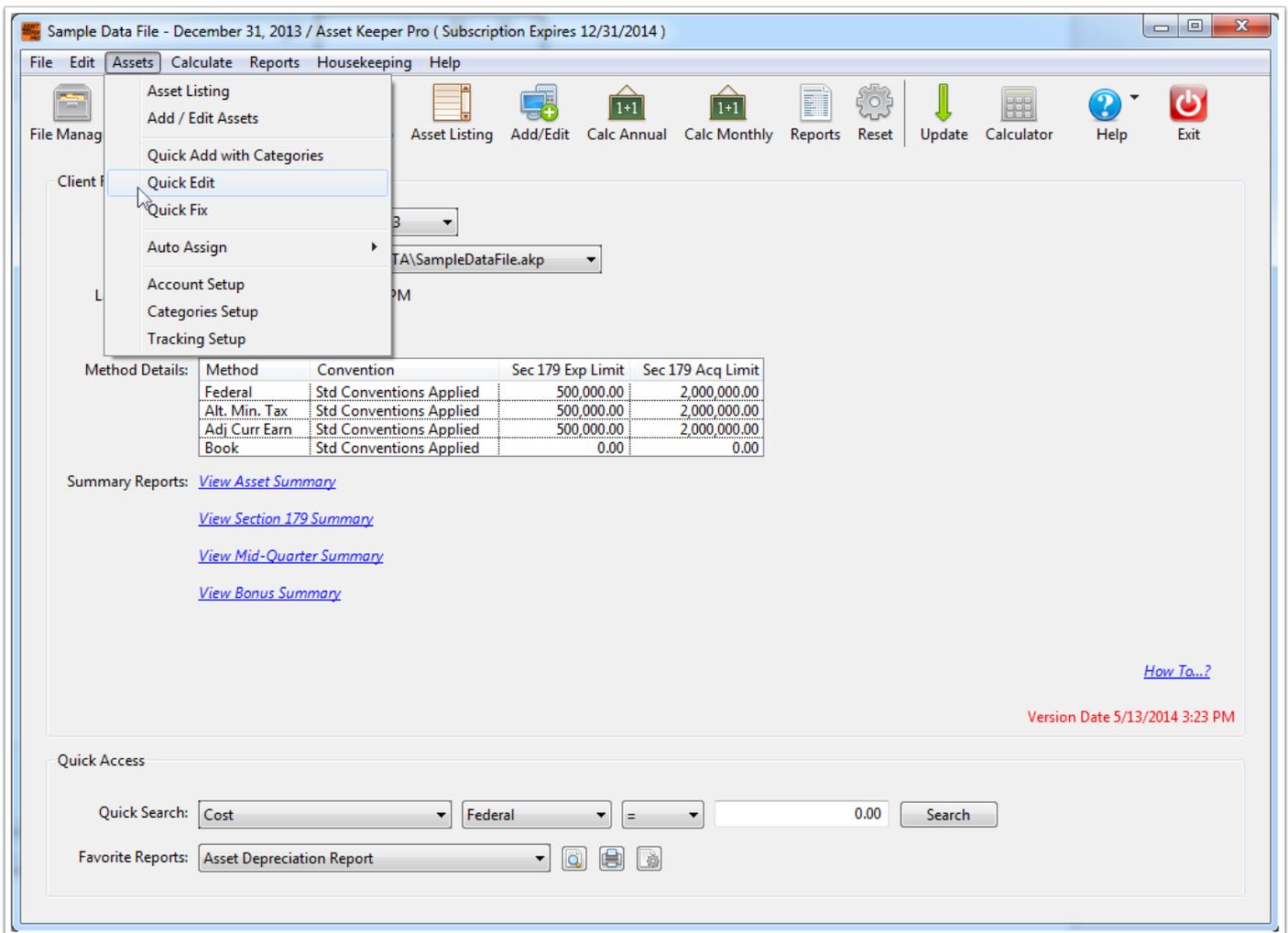
Sort Code 5	Acquired	Description	Status	Cost	Current Depr
	5/1/2013	Test Asset	A	10,000.00	10,000.00
	10/1/2012	Apple Macbook Air 13 inch	A	1,875.99	340.16
	10/1/2012	Apple Ipad 10 inch	A	685.75	137.15
	9/1/2012	2 Office chairs	A	1,500.00	183.67
	4/1/2012	4 Apple iPad minis	A	2,829.98	212.80
	5/1/2010	3 Epson printers	A	25,000.00	1,775.00
	3/1/2010	2 Bush desks	A	2,238.12	139.83
	1/1/2009	Conference room table and 12 chairs	A	3,899.89	174.03
	8/1/2008	4 Dell desktops	A	4,865.59	140.13
	5/1/2008	2009 Ford Crown Victoria	A	10,000.00	360.00
	5/1/2008	2006 Audi A6	A	64,286.00	1,775.00
	1/8/2008	6 Canon calculators	A	148.65	4.28
	6/1/2007	Book shelves	A	2,425.75	82.63

[How To...?](#)

Quick Edit in the Assets Menu

The Quick Edit option is in the Assets menu.

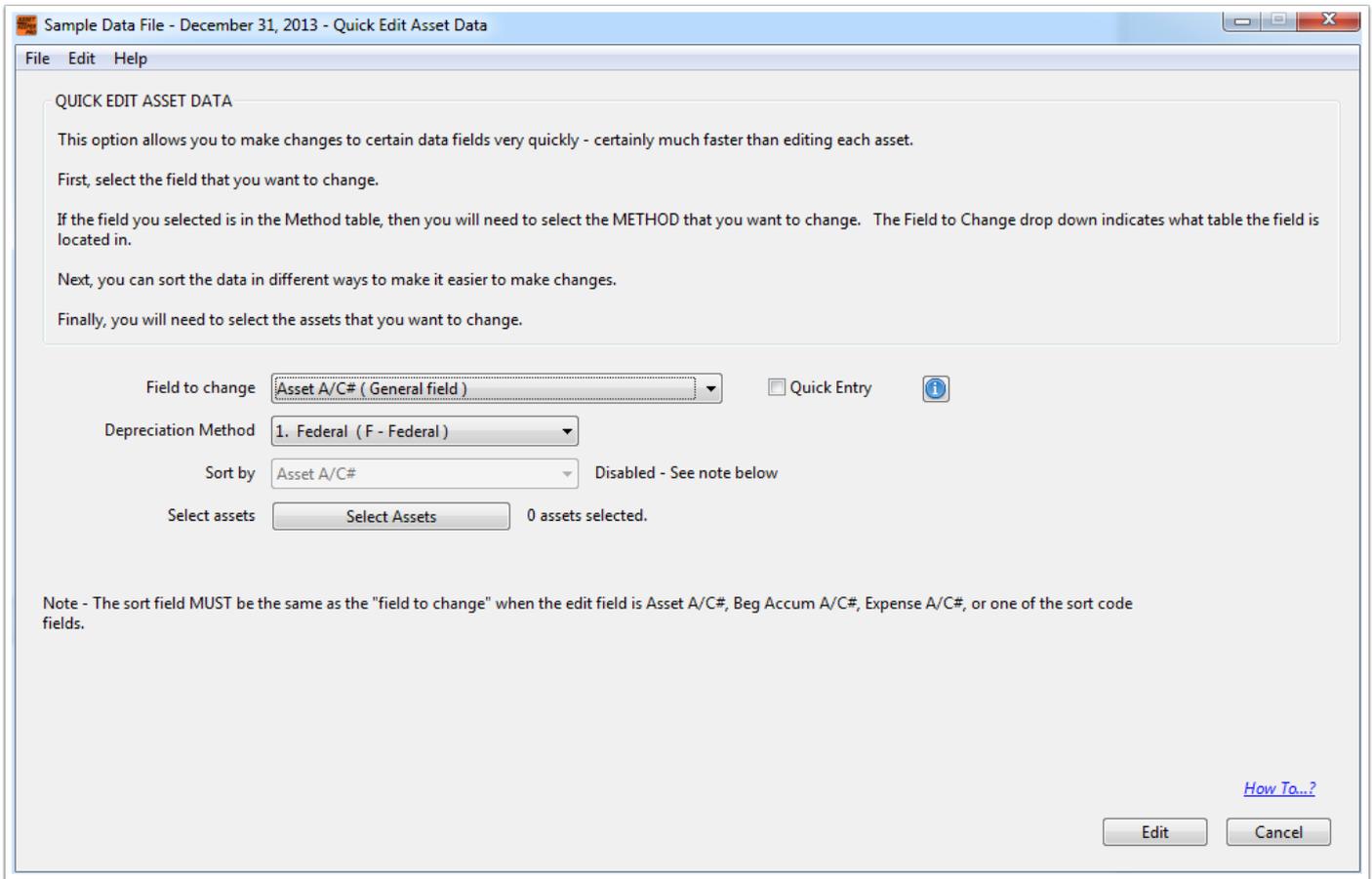
When you select this option, you will be prompted to create a backup of your file.



Quick Edit Screen

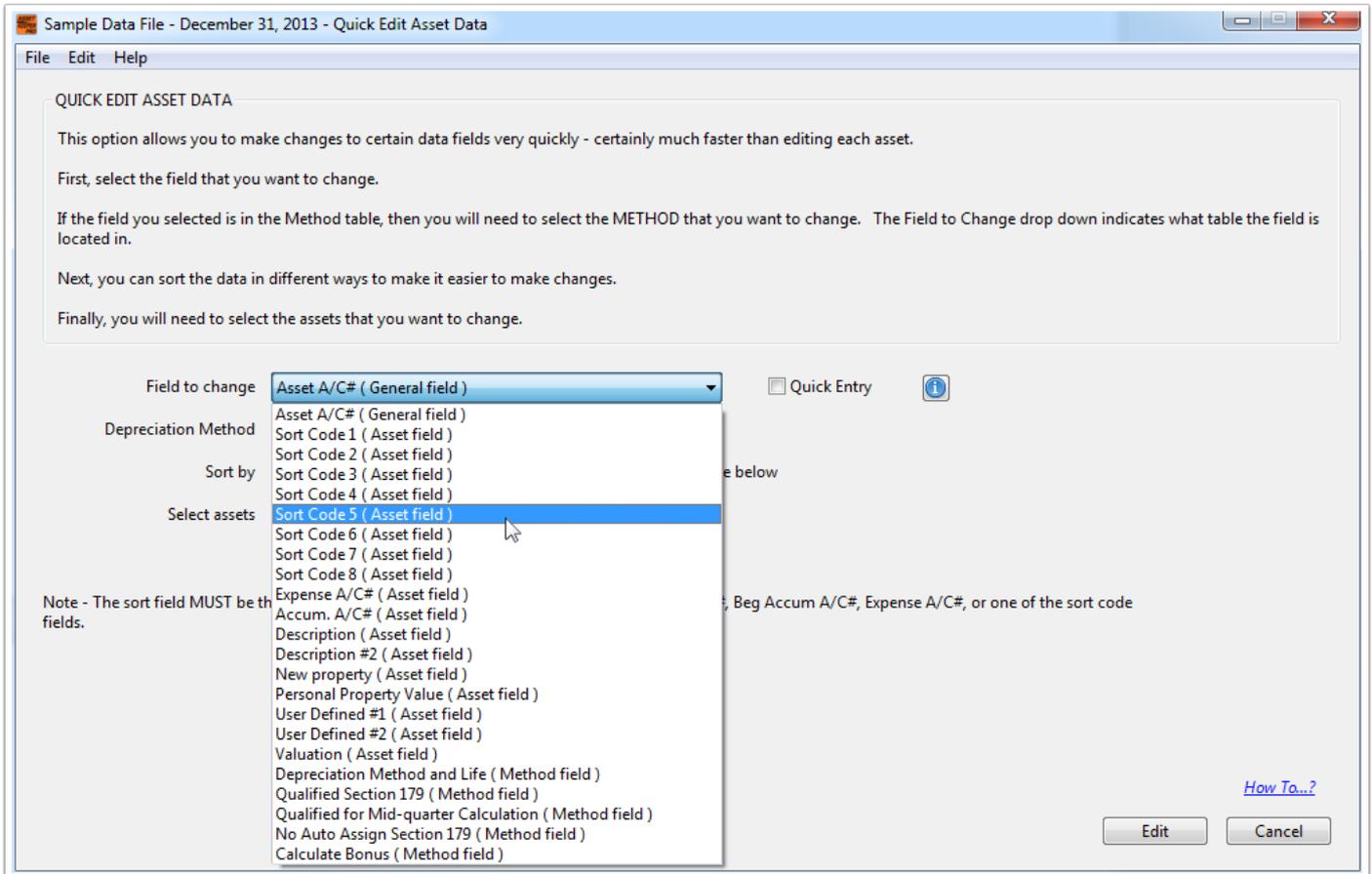
The Quick Edit screen allows you to make changes to your asset data very quickly.

The steps to make changes are outlined at the top of the Quick Edit screen.



Field to Change

First, we select Sort Code #5 from the list of fields that can be changed using the Quick Edit option.



Select Assets to change

We don't need to change the Depreciation Method because the field we selected is an "asset" field. Note in the "Field to Change" says "Sort Code 5 (Asset field)". This means that the field is part of the asset data, rather than specific to a method (such as book, tax, state, AMT, etc.).

Now we need to indicate what assets we want to change, so we will click the Select Assets button to do that.

Sample Data File - December 31, 2013 - Quick Edit Asset Data

File Edit Help

QUICK EDIT ASSET DATA

This option allows you to make changes to certain data fields very quickly - certainly much faster than editing each asset.

First, select the field that you want to change.

If the field you selected is in the Method table, then you will need to select the METHOD that you want to change. The Field to Change drop down indicates what table the field is located in.

Next, you can sort the data in different ways to make it easier to make changes.

Finally, you will need to select the assets that you want to change.

Field to change: Asset A/C# (General field) Quick Entry

Depreciation Method: 1. Federal (F - Federal)

Sort by: Asset A/C# Disabled - See note below

Select assets: 0 assets selected.

Note - The sort field MUST be the same as the "field to change" fields. Expense A/C#, or one of the sort code fields.

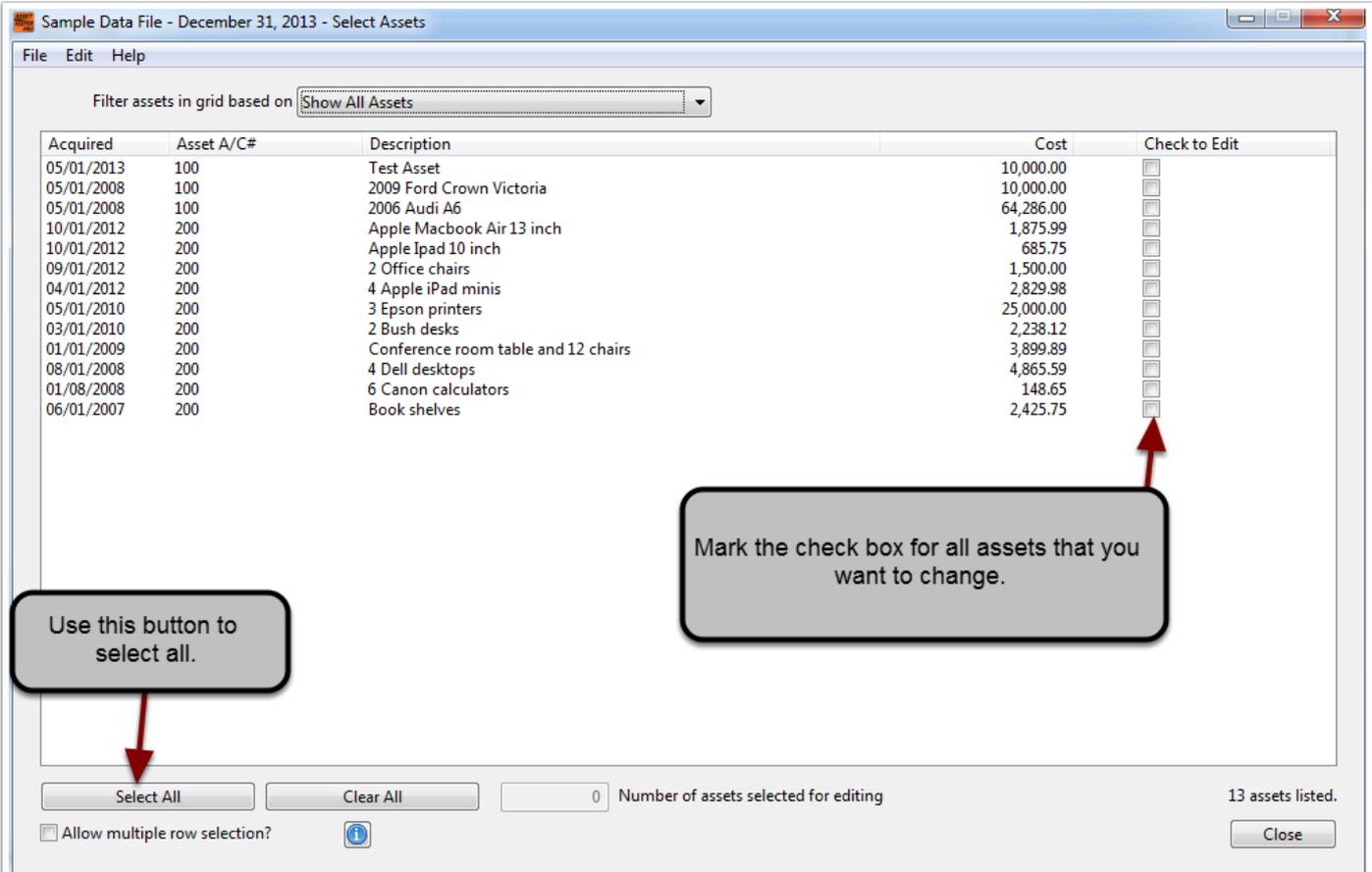
This button allows to select which assets we want to change.

[How To...?](#)

Select Assets screen

This is the Select Assets screen. Note that this is a visual process, that is, you can actually see what assets are available to change. You indicate which ones you want to change by clicking the check box in the last column of the grid. Since we want to change them ALL, we'll just click the Select All button at the bottom of the screen.

By default, all assets in your file will be listed, but there is a combo box at the top of the screen that allows you to apply filters that will show specific assets.



The screenshot shows a window titled "Sample Data File - December 31, 2013 - Select Assets". At the top, there is a menu bar with "File", "Edit", and "Help". Below the menu bar is a filter dropdown menu labeled "Filter assets in grid based on" with "Show All Assets" selected. The main area contains a table with the following columns: "Acquired", "Asset A/C#", "Description", "Cost", and "Check to Edit". The table lists 13 assets. At the bottom of the window, there are two buttons: "Select All" and "Clear All". To the right of these buttons is a text field showing "0" and the label "Number of assets selected for editing". Further right, it says "13 assets listed." and a "Close" button. There is also a checkbox labeled "Allow multiple row selection?".

Acquired	Asset A/C#	Description	Cost	Check to Edit
05/01/2013	100	Test Asset	10,000.00	<input type="checkbox"/>
05/01/2008	100	2009 Ford Crown Victoria	10,000.00	<input type="checkbox"/>
05/01/2008	100	2006 Audi A6	64,286.00	<input type="checkbox"/>
10/01/2012	200	Apple Macbook Air 13 inch	1,875.99	<input type="checkbox"/>
10/01/2012	200	Apple Ipad 10 inch	685.75	<input type="checkbox"/>
09/01/2012	200	2 Office chairs	1,500.00	<input type="checkbox"/>
04/01/2012	200	4 Apple iPad minis	2,829.98	<input type="checkbox"/>
05/01/2010	200	3 Epson printers	25,000.00	<input type="checkbox"/>
03/01/2010	200	2 Bush desks	2,238.12	<input type="checkbox"/>
01/01/2009	200	Conference room table and 12 chairs	3,899.89	<input type="checkbox"/>
08/01/2008	200	4 Dell desktops	4,865.59	<input type="checkbox"/>
01/08/2008	200	6 Canon calculators	148.65	<input type="checkbox"/>
06/01/2007	200	Book shelves	2,425.75	<input type="checkbox"/>

Use this button to select all.

Mark the check box for all assets that you want to change.

Select All Clear All 0 Number of assets selected for editing 13 assets listed. Close

Allow multiple row selection?

All asset selected

This is the Select Assets screen after we clicked the Select All button. Return to the Quick Edit screen by clicking the Close button.

Sample Data File - December 31, 2013 - Select Assets

File Edit Help

Filter assets in grid based on Show All Assets

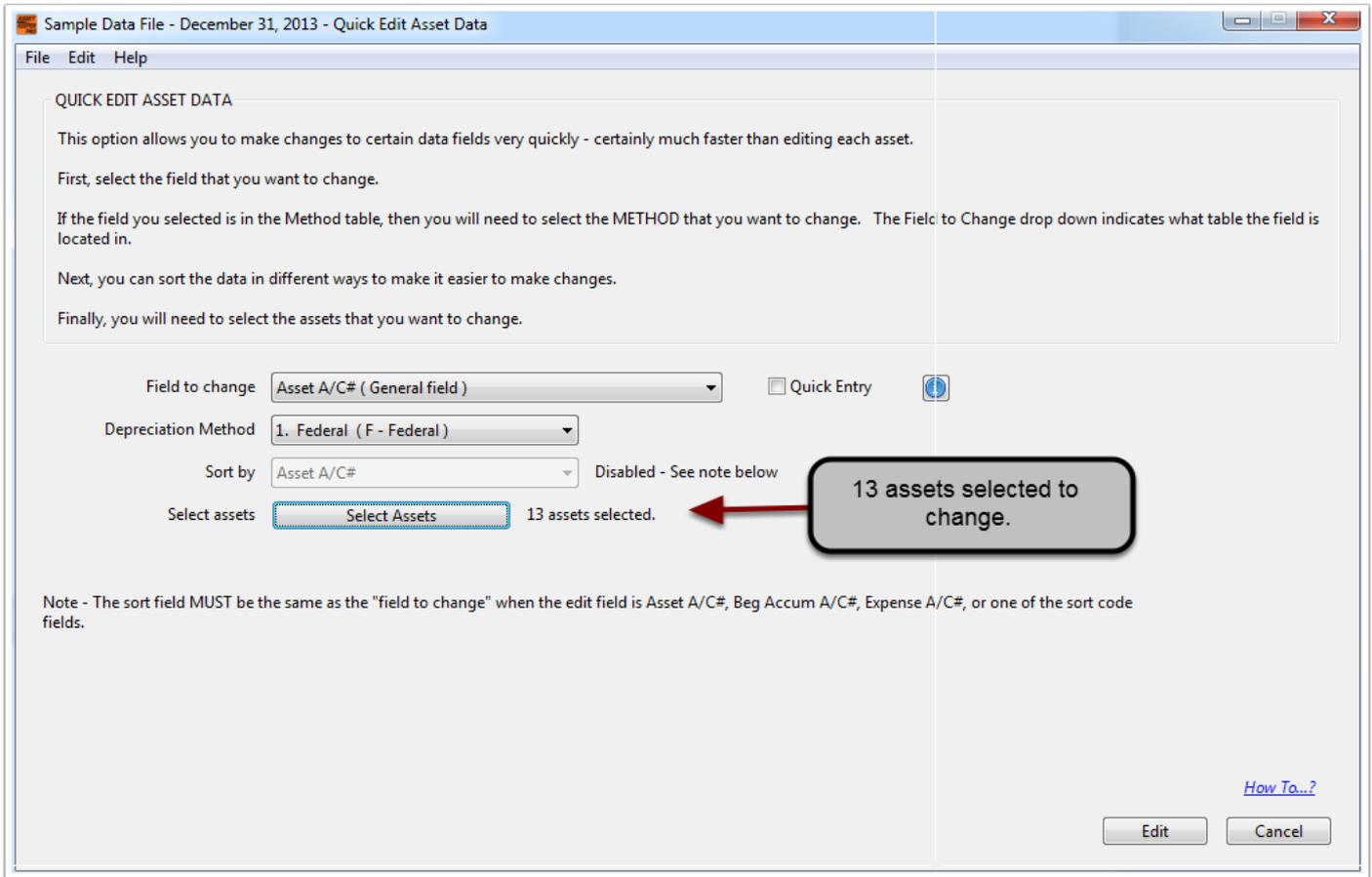
Acquired	Asset A/C#	Description	Cost	Check to Edit
05/01/2013	100	Test Asset	10,000.00	<input checked="" type="checkbox"/>
05/01/2008	100	2009 Ford Crown Victoria	10,000.00	<input checked="" type="checkbox"/>
05/01/2008	100	2006 Audi A6	64,286.00	<input checked="" type="checkbox"/>
10/01/2012	200	Apple Macbook Air 13 inch	1,875.99	<input checked="" type="checkbox"/>
10/01/2012	200	Apple Ipad 10 inch	685.75	<input checked="" type="checkbox"/>
09/01/2012	200	2 Office chairs	1,500.00	<input checked="" type="checkbox"/>
04/01/2012	200	4 Apple iPad minis	2,829.98	<input checked="" type="checkbox"/>
05/01/2010	200	3 Epson printers	25,000.00	<input checked="" type="checkbox"/>
03/01/2010	200	2 Bush desks	2,238.12	<input checked="" type="checkbox"/>
01/01/2009	200	Conference room table and 12 chairs	3,899.89	<input checked="" type="checkbox"/>
08/01/2008	200	4 Dell desktops	4,865.59	<input checked="" type="checkbox"/>
01/08/2008	200	6 Canon calculators	148.65	<input checked="" type="checkbox"/>
06/01/2007	200	Book shelves	2,425.75	<input checked="" type="checkbox"/>

Select All Clear All 13 Number of assets selected for editing 13 assets listed.

Allow multiple row selection?

Quick Edit

We are back at the Quick Edit screen and you can see that we have our 13 assets selected as the ones we want to edit. Now we click the Edit button at the bottom of the screen.



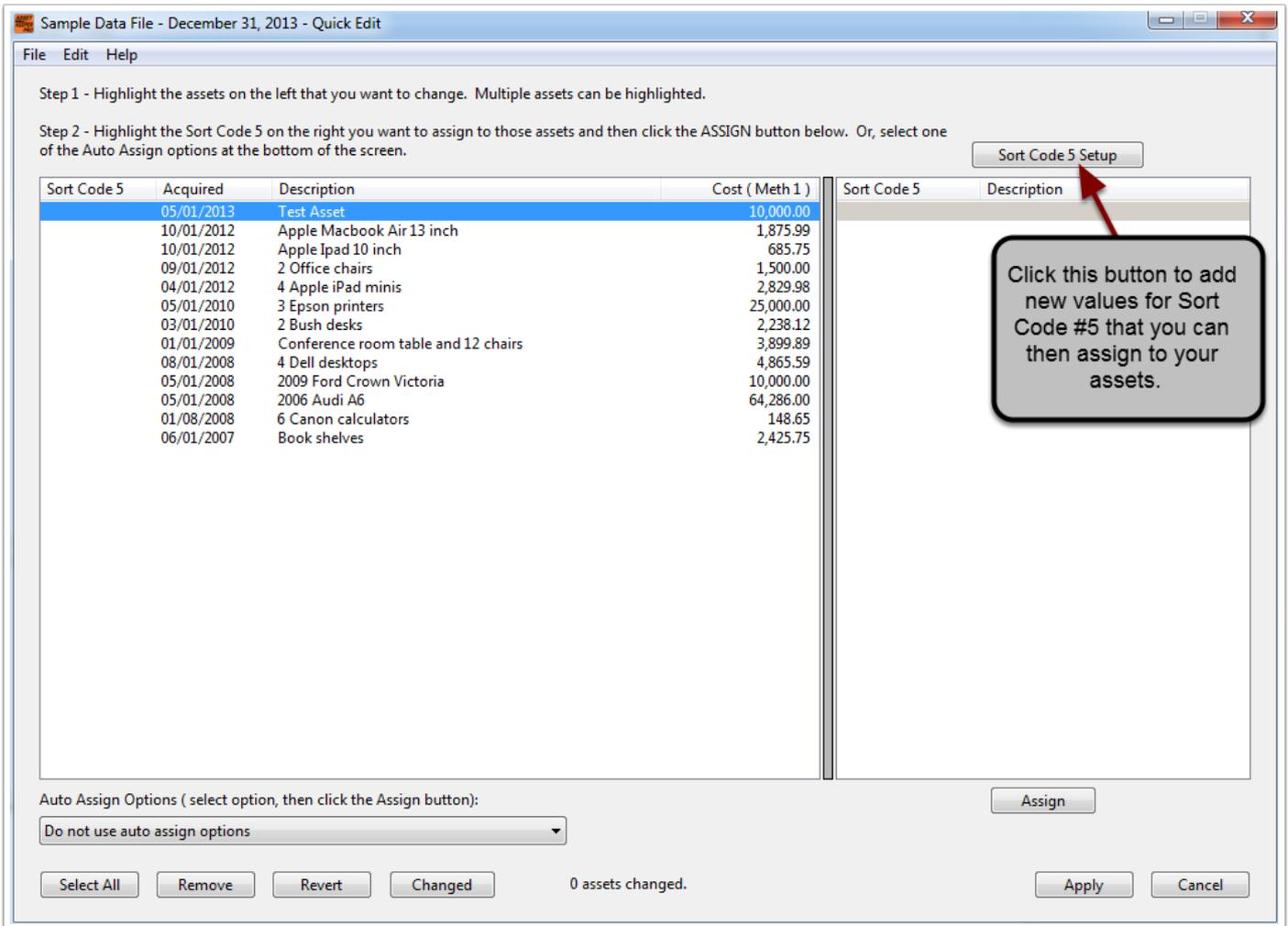
Edit Screen

We are now at the Edit screen so we can change our Sort Code #5. This looks like a complicated screen, but as you'll see, it's really very straight-forward. There are actually two different screens that can be used to change sort code or account number fields. This one is used when you want to assign a code to a large number (or all of) your assets. The other screen (called Quick Entry) is better if you want to enter unique values for each asset. For example, if you want to enter a serial number for each asset, the Quick Entry screen is optimized for that purpose.

The Edit screen is broken into 2 parts. On the left side is a grid listing all the assets that we selected. Note that the 13 assets that we selected are displayed in this grid.

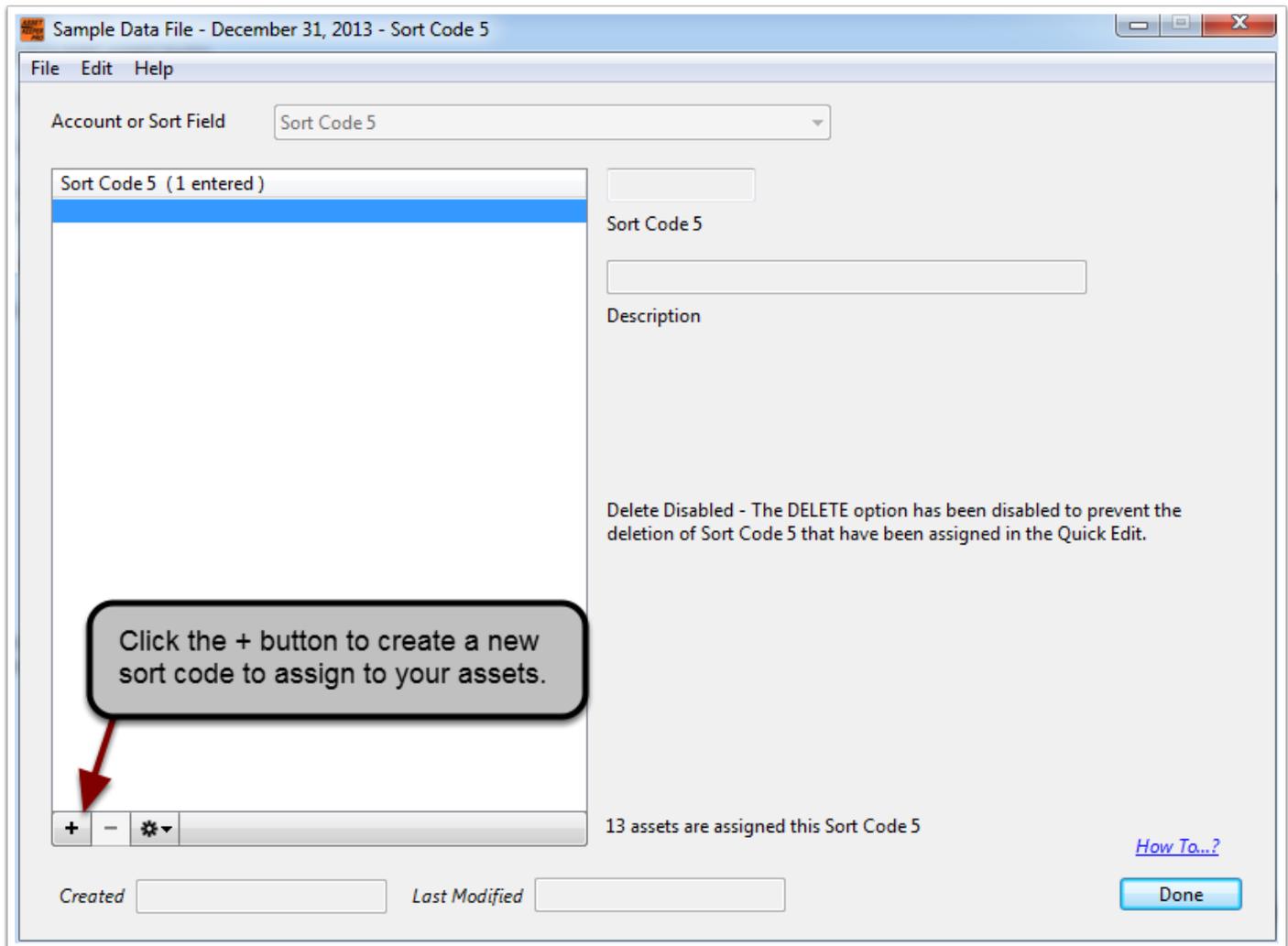
There is a dark gray line that has another grid showing what codes have been created for Sort Code #5 that we can actually assign to our assets. Currently, we have not created any codes that we want to assign to Sort Code #5, but we'll do that next.

So our first step is to create a code that we want to assign to our assets. In this example, let's assume that we have to enter the code "PT7" (short for property type 7) in Sort Code #5 for all assets. To create the code, we click the Account Setup button.



Account Setup

This is the Account Setup screen before "PT7" has been created as a code to be assigned to Sort Code #5. You click the + button at the bottom to add a new Sort Code #5.



Account Setup - New code created

This is the Account Setup screen after the PT7 code has been created. Now we click the Done button to return to the Edit screen so we can assign it to our assets.

The screenshot shows a software window titled "Sample Data File - December 31, 2013 - Sort Code 5". The window has a menu bar with "File", "Edit", and "Help". Below the menu bar, there is a dropdown menu labeled "Account or Sort Field" with "Sort Code 5" selected. The main area is split into two panes. The left pane is a list box containing "Sort Code 5 (2 entered)" and "PT7 Property type 7", with the latter selected. The right pane contains a form with the following fields: "PT7" (text input), "Sort Code 5" (text input), "Property type 7" (text input), and "Description" (text area). Below the form, there is a message: "Delete Disabled - The DELETE option has been disabled to prevent the deletion of Sort Code 5 that have been assigned in the Quick Edit." At the bottom of the window, there is a status bar with "Created" and "Last Modified" both set to "5/13/2014 - 4:58 PM". A "Done" button is located in the bottom right corner. A "How To...?" link is also present.

Edit Screen - account setup code created

This is the Edit screen after the PT7 code has been added to our Account Setup file. As you can see, it now appears in the list of Codes that we can assign to our assets.

To do this, we first highlight all the assets on the left, then click the PT7 code on the right, then click the Assign button at the bottom of the screen.

By the way, there are a number of ways to highlight assets in the grid on the left. You can hold the CTRL (CMD on a Mac) key down and click the ones you want to change, or click on one then SHIFT-CLICK on another one and all assets in between are all selected, or you can click and drag to highlight a group of assets.

Sample Data File - December 31, 2013 - Quick Edit

File Edit Help

Step 1 - Highlight the assets on the left that you want to change. Multiple assets can be highlighted.

Step 2 - Highlight the Sort Code 5 on the right you want to assign to those assets and then click the ASSIGN button below. Or, select one of the Auto Assign options at the bottom of the screen.

Sort Code 5 Setup

Sort Code 5	Acquired	Description	Cost (Meth 1)
	05/01/2013	Test Asset	10,000.00
	10/01/2012	Apple Macbook Air 13 inch	1,875.99
	10/01/2012	Apple Ipad 10 inch	685.75
	09/01/2012	2 Office chairs	1,500.00
	04/01/2012	4 Apple iPad minis	2,829.98
	05/01/2010	3 Epson printers	25,000.00
	03/01/2010	2 Bush desks	2,238.12
	01/01/2009	Conference room table and 12 chairs	3,899.89
	08/01/2008	4 Dell desktops	4,865.59
	05/01/2008	2009 Ford Crown Victoria	10,000.00
	05/01/2008	2006 Audi A6	64,286.00
	01/08/2008	6 Canon calculators	148.65
	06/01/2007	Book shelves	2,425.75

Sort Code 5	Description
PT7	Property type 7

Auto Assign Options (select option, then click the Assign button):

Do not use auto assign options

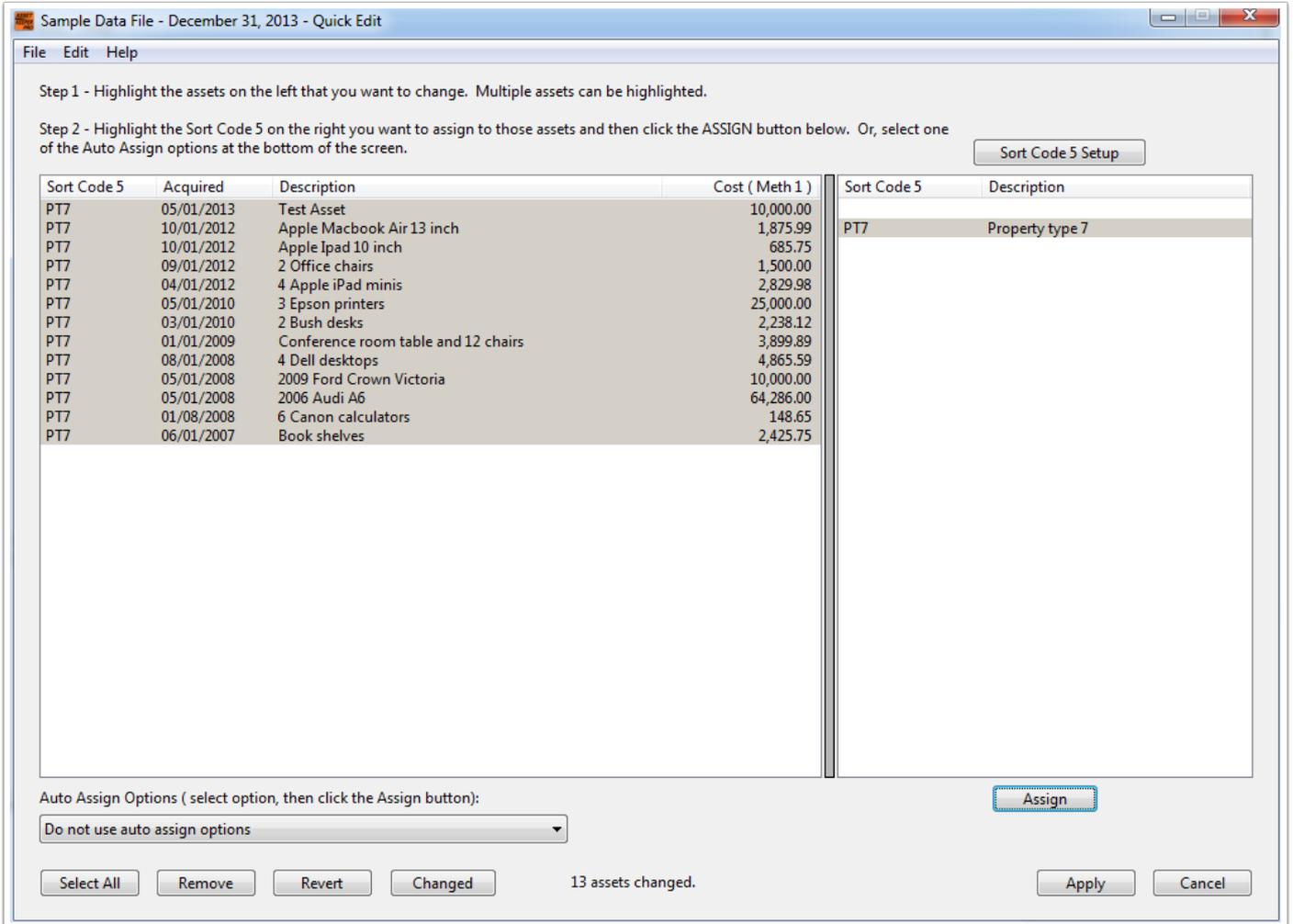
Assign

Select All Remove Revert Changed 0 assets changed. Apply Cancel

Edit screen - after assigning code

This is what the Edit screen looks like after we've assigned the PT7 code to all assets.

Even though it looks like our assets are changed, they really haven't. Nothing happens that can't be reversed until you click the Apply button at the bottom of the screen.



Sample Data File - December 31, 2013 - Quick Edit

File Edit Help

Step 1 - Highlight the assets on the left that you want to change. Multiple assets can be highlighted.

Step 2 - Highlight the Sort Code 5 on the right you want to assign to those assets and then click the ASSIGN button below. Or, select one of the Auto Assign options at the bottom of the screen.

Sort Code 5 Setup

Sort Code 5	Acquired	Description	Cost (Meth 1)
PT7	05/01/2013	Test Asset	10,000.00
PT7	10/01/2012	Apple Macbook Air 13 inch	1,875.99
PT7	10/01/2012	Apple Ipad 10 inch	685.75
PT7	09/01/2012	2 Office chairs	1,500.00
PT7	04/01/2012	4 Apple iPad minis	2,829.98
PT7	05/01/2010	3 Epson printers	25,000.00
PT7	03/01/2010	2 Bush desks	2,238.12
PT7	01/01/2009	Conference room table and 12 chairs	3,899.89
PT7	08/01/2008	4 Dell desktops	4,865.59
PT7	05/01/2008	2009 Ford Crown Victoria	10,000.00
PT7	05/01/2008	2006 Audi A6	64,286.00
PT7	01/08/2008	6 Canon calculators	148.65
PT7	06/01/2007	Book shelves	2,425.75

Sort Code 5	Description
PT7	Property type 7

Auto Assign Options (select option, then click the Assign button):

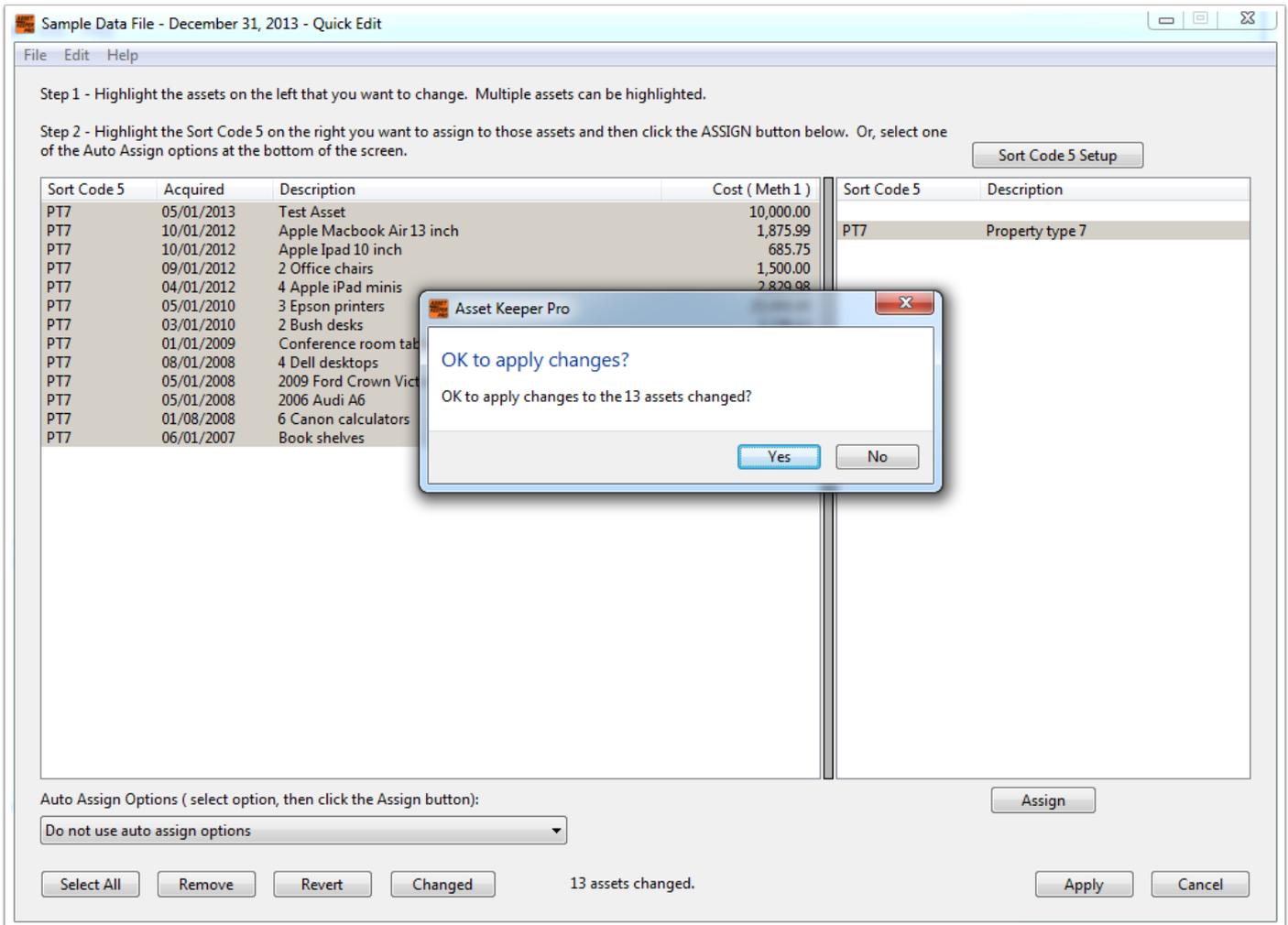
Do not use auto assign options

Assign

Select All Remove Revert Changed 13 assets changed. Apply Cancel

Apply Changes

When you click the Apply button you will be asked to confirm that you want to apply these changes to your file.



Changes Applied!

In the blink of an eye, all your changes are applied to your assets.

The screenshot shows the 'Asset Keeper Pro' application window titled 'Sample Data File - December 31, 2013 - Quick Edit'. The interface includes a menu bar (File, Edit, Help) and instructional text: 'Step 1 - Highlight the assets on the left that you want to change. Multiple assets can be highlighted.' and 'Step 2 - Highlight the Sort Code 5 on the right you want to assign to those assets and then click the ASSIGN button below. Or, select one of the Auto Assign options at the bottom of the screen.' A 'Sort Code 5 Setup' button is visible in the top right.

Sort Code 5	Acquired	Description	Cost (Meth 1)	Sort Code 5	Description
PT7	05/01/2013	Test Asset	10,000.00		
PT7	10/01/2012	Apple Macbook Air 13 inch	1,875.99	PT7	Property type 7
PT7	10/01/2012	Apple Ipad 10 inch	685.75		
PT7	09/01/2012	2 Office chairs	1,500.00		
PT7	04/01/2012	4 Apple iPad minis	2,829.98		
PT7	05/01/2010	3 Epson printers	25,000.00		
PT7	03/01/2010	2 Bush desks			
PT7	01/01/2009	Conference room table a			
PT7	08/01/2008	4 Dell desktops			
PT7	05/01/2008	2009 Ford Crown Victoria			
PT7	05/01/2008	2006 Audi A6			
PT7	01/08/2008	6 Canon calculators			
PT7	06/01/2007	Book shelves			

An 'Asset Keeper Pro' dialog box is overlaid on the table, displaying the message: 'All assets have been changed! There were 13 assets that were changed!' with an 'OK' button.

At the bottom of the application window, there is an 'Auto Assign Options (select option, then click the Assign button):' section with a dropdown menu set to 'Do not use auto assign options' and an 'Assign' button. Below this are buttons for 'Select All', 'Remove', 'Revert', and 'Changed', followed by the text '13 assets changed.' and 'Apply' and 'Cancel' buttons.

Ready for more changes

After your changes have been made, you are returned to the Quick Edit screen and you can make more fast changes.

By the way, note the Quick Entry checkbox. If you check this option, you are presented with a different edit screen that is optimized for entering unique values for each asset.

Sample Data File - December 31, 2013 - Quick Edit Asset Data

File Edit Help

QUICK EDIT ASSET DATA

This option allows you to make changes to certain data fields very quickly - certainly much faster than editing each asset.

First, select the field that you want to change.

If the field you selected is in the Method table, then you will need to select the METHOD that you want to change. The Field to Change drop down indicates what table the field is located in.

Next, you can sort the data in different ways to make it easier to make changes.

Finally, you will need to select the assets that you want to change.

Field to change: Sort Code 5 (Asset field) Quick Entry

Depreciation Method: 1. Federal (F - Federal)

Sort by: Sort Code 5 Disabled - See note below

Select assets: 13 assets selected.

Note - The sort field MUST be the same as the "field to change" when the edit field is Asset A/C#, Beg Accum A/C#, Expense A/C#, or one of the sort code fields.

[How To...?](#)

Asset Listing shows changes

This is the Asset Listing one more time showing that indeed our assets have all been change. Note that Sort Code #5 now contains our PT7 code that we assigned to all assets.

Quick Edit is just one example of the way the data you enter in Asset Keeper Pro remains dynamic because it can be changed in seconds rather than hours. As your needs change, Asset Keeper Pro provides the tools to meet those needs without requiring needless editing of asset after asset.

Sample Data File - December 31, 2013 - Asset Listing

File Edit Help

Listing Filter/Search Configure Methods Details Add Dispose Select Edit Delete Print Close

Sort Code 5 GoTo - Apply settings to Add / Edit? Show All 13 of 13 assets listed

Sort Code 5	Acquired	Description	Status	Cost	Current Depr
PT7	5/1/2013	Test Asset	A	10,000.00	10,000.00
PT7	10/1/2012	Apple Macbook Air 13 inch	A	1,875.99	340.16
PT7	10/1/2012	Apple Ipad 10 inch	A	685.75	137.15
PT7	9/1/2012	2 Office chairs	A	1,500.00	183.67
PT7	4/1/2012	4 Apple iPad minis	A	2,829.98	212.80
PT7	5/1/2010	3 Epson printers	A	25,000.00	1,775.00
PT7	3/1/2010	2 Bush desks	A	2,238.12	139.83
PT7	1/1/2009	Conference room table and 12 chairs	A	3,899.89	174.03
PT7	8/1/2008	4 Dell desktops	A	4,865.59	140.13
PT7	5/1/2008	2009 Ford Crown Victoria	A	10,000.00	360.00
PT7	5/1/2008	2006 Audi A6	A	64,286.00	1,775.00
PT7	1/8/2008	6 Canon calculators	A	148.65	4.28
PT7	6/1/2007	Book shelves	A	2,425.75	82.63

[How To...?](#)