



# Productivity Tips

*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 Reference Guide*

## 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: MassChange)
- From Quick Reports: Check the Check Special Needs box for a quick preview
- On ACEweb Info Tab: the Blue Copy Link to Course Status Page (top right) allows you to preview/share the URL with others

## 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!



# Productivity Tips

## 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](#))
- **NEW FEATURE:** From Courses Taken, you may EDIT completed date, hour, CEUs, credits, grade, reg status and registration note.

## 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 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.



# Productivity Tips

## 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 stores 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 long “querylistmanager” view, right click to get the “filter” option.
- Looking to query for a specific field? Use the Search Queries 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.



# Productivity Tips

- User your shortcuts (F1, F2, F3, F5, F7 especially!)

## 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](#))