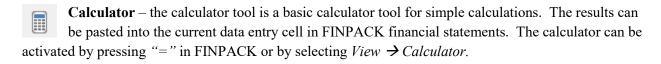# FINPACK Shortcut Icons

Updated July 2019

FINPACK has a number of useful tools that can aid users with data entry and program utility. Helpful icons include:
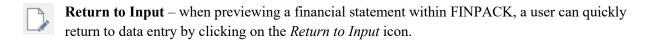
File Open – clicking this icon will take you to the full list of FINPACK files in your directory. This is the same action as clicking *More…* when first entering FINPACK. This shortcut can also be accomplished by *Ctrl + O* or *File → Open.*

Save – selecting this icon allows a user to save updated information in the open FINPACK file. This shortcut can also be accomplished by *Ctrl + S* or *File → Save.*

Print – clicking this icon opens the Print dialog box, where the user can print the current document to a printer or file. In this dialog box, the user can also select the pieces of output to be printed and can preview the output. This shortcut can also be accomplished by *Ctrl + P* or *File → Print.*

Reminders – inputting details in the Reminders, allows a user to notate action steps or reminders associated with a particular file. Here tasks can be scheduled and progress can be tracked when completing the credit analysis of a specific file. Reminders can be displayed whenever the file is opened or when an uncompleted task is past due. Reminders can also be accessed by going to *File → Reminders.* Reminders consist of 4 parts:

- Completed? - where the reminder task is checked as completed
- Due Date – date the reminder is to be completed
- Item – specific item within the FINPACK file needing completion; like Balance Sheet, or Budget
- Description – details regarding the task to complete

Loan Calculator – this freestanding loan calculator aids in the entry of a new loan or editing an existing loan within the Balance Sheet, Cash Flow Projection (FINFLO) or Long Range Plan (FINLRB). Both amortized and fixed principal loans can be solved for in the calculator. The loan calculator can also be activated by selecting *View → Loan Calculator.*

Calculator – the calculator tool is a basic calculator tool for simple calculations. The results can be pasted into the current data entry cell in FINPACK financial statements. The calculator can be activated by pressing *"="* in FINPACK or by selecting *View → Calculator.*

Preview Output – by clicking this icon, the user can preview the output of the current financial statement open in FINPACK. By selecting the drop down arrow on the right, the user is able to select the output options available with that statement.

Return to Input – when previewing a financial statement within FINPACK, a user can quickly return to data entry by clicking on the *Return to Input* icon.

Zoom In – when previewing a document, a user can further *Zoom In* the output by clicking this.

Zoom Out – when previewing a document, a user can further *Zoom Out* the output by clicking this.

View/Edit Detail – this icon takes the user into the detail entry of the particular data entry point in FINPACK. Detail is typically an option within FINPACK financial statements, but is never required. For example, the Cash and Checking balance can be entered on the main Current Assets level on the balance sheet. Or the user can click the *View/Edit Detail* icon to enter detailed information regarding deposit accounts and their balance. View/Edit Detail can also be accessed by pressing *F3* or going to *Edit → Detail.*

View/Edit Notes – there is a notepad associated with each FINPACK financial statement. Here users can notate important items regarding the customer, data entry, or other items as needed. Notes can then be printed with the output of the particular financial statement. View/Edit Notes can also be accessed by pressing *Ctrl + N*, going to *Edit → Notes,* or clicking the three dots in the data entry field.

Month Due Pattern – when entering an expense payment or the receipt of income fits a defined pattern, this tool can be selected. This shortcut tool is available when entering a monthly cash flow projection. Once in Pattern detail, the user can select the frequency of the payment during the year and the first month the payment is to be made. When details are entered and *OK* is selected, the details for the income or expense items are transferred to FINPACK data entry.

Delete – when a user is in a detail dialog box or the file navigator box and would like to delete the detail or particular financial statement the trash can icon can be clicked. A warning box will display to ensure there is not accidental data deletion.

Cut – when in a detail dialog box, a user is able to "cut" data to be pasted elsewhere or deleted. This functions like "cut" in other programs. This function can also be accomplished by *Ctrl + X* or *Edit → Cut.*

Copy – when in a detail dialog box, a user is able to "copy" data to be pasted elsewhere in data entry. This functions like "copy" in other programs. This function can also be accomplished by *Ctrl + C* or *Edit → Copy.*

Paste - when in a detail dialog box, a user is able to "paste" data to that has been copied elsewhere in data entry. This functions like "paste" in other programs. This function can also be accomplished by *Ctrl + V* or *Edit → Paste.*

Repeat Last Number – when in a detail dialog box, a user is able to repeat the last number entered by clicking on this icon. This function can also be accomplished by *Ctrl + R* or *Edit →* *Repeat Last Number.*

Undo – when in a detail dialog box, a user is able to undo their last action by clicking on this icon. This function can also be accomplished by *Ctrl + Z* or *Edit → Undo.*

Insert a Row – when in a detail dialog box, a user is able to insert a row above the current row the cursor is located in. This function is also accomplished by *Ctrl + I* or *Edit → Insert Line.*

Delete a Row - when in a detail dialog box, a user is able to delete the current row their cursor is located in. This function can also be accomplished by *Ctrl + D* or *Edit → Delete Line.*

Percent Adjustment – when in capital asset entry of a detailed balance sheet, a user can use the percent adjustment feature to adjust the cost and/or market values of the capital asset detail. This is a way to quickly depreciate machinery values, for example, when copying forward a balance sheet from the previous year. All assets can be adjusted by the same amount by selecting *Select All* or individual assets can be adjusted by using *Unselect All* and then selecting those assets to depreciate.

Toggle – this feature allows a user to toggle between viewing and entering data as a distribution (or percent) or whole dollars. This feature is available in the Monthly Cash Flow Projection tool (FINFLO), when total income and expense for the year need to be entered into the monthly detail. Also, the toggle feature is available for users in certain sections of enterprise analysis within the Financial Analysis (FINAN) tool.

Excel Monitoring Worksheet – use this icon while in the data entry of a Monthly Cash Flow Projection (FINFLO) to create an electronic worksheet to automate the process of monitoring a planned versus actual for a projection. Once initiated, Excel Monitoring Worksheet function will prompt the user to pick the last month to include in the comparison and the name and location of where to save the Excel spreadsheet. When these steps are done, a worksheet is created and saved in the designated location. The user can then access this newly saved spreadsheet. Data entry in the monitoring worksheet

consists of entering actual cash inflows and outflows to date. The spreadsheet automatically calculates dollar and percent change of the planned versus actual of the projection.

Cash Accuracy Check – this tool is used in the Financial Analysis (FINAN) tool to quickly see if there is a cash discrepancy. Here cash inflows are compared to cash outflows in the analysis and a cash discrepancy is shown, if there is one. If a discrepancy is present, this amount is automatically factored into family living expense and is reported as *Adjusted Family Living Expense.*

Help – clicking on the question mark icon, when available, the help contents are initiated. The help contents will navigate to the user's current data entry location to provide specific help. The help contents can be further queried or searched for other help topics. Help can also be initiated by *F1* or *Help → Contents* or *Help → How Do I?*

Export to a CSV file – when in a detail dialog box of Intermediate Assets/Long-Term Assets/ Personal Assets (Agriculture balance sheet) or Noncurrent Assets/Personal Assets (Commercial balance sheet), a user is able to export that data to a CSV file.

Import from a CSV file – when in a detail dialog box of Intermediate Assets/Long-Term Assets/Personal Assets (Agriculture balance sheet) or Noncurrent Assets/Personal Assets (Commercial balance sheet), a user is able to import that data from a CSV file.