

PortfolioCenter® Keyboard Shortcuts

There are many keyboard shortcuts that you can use to make data entry and program navigation a little faster.

Shortcut	Description	Program Area
F1	Help	All of the program
F4	Select from List	Any field with a down arrow or a browse box
Ctrl + Tab	Moves between tabs	Main Window, Portfolio Details, Billing Spec Details
ESC	Clear	All fields in the program
Ctrl + Insert	Paste last entered in this field	All fields in the program
F5	Refresh	All of the program
Tab	Moves between fields	All of the program
Ctrl + F	Find	All of the program
Ctrl + C	Copy selected text (or text in field)	All of the program
Ctrl + X	Cut selected text (or text in field)	All of the program
Ctrl + V	Paste copied text (or text in field)	All of the program
Alt + F4	Close Window, Exit Program	All of the program
Page Up	Move up one page	Any list in the program
Page Down	Move down one page	Any list in the program
Ctrl + Home	Top of list	Any list in the program
Ctrl + End	Bottom of list	Any list in the program
Arrow Keys	Move up, down, right, left	Any list in the program
Alt + D	Go To Details for selected item	Portfolios, Securities, Billing, Models, Interfaces tabs
Alt + S	Save	Portfolio Details, Security Details, Price Details, Billing Spec Details, Billing Form Details, Model Details, Target Details, Category Details
Alt + W	New Portfolio	Portfolios List tab
Alt + R	Reports	Portfolios List tab

Shortcut	Description	Program Area
Alt + N	Notes	Portfolios List tab
Alt + I	Intervals	Portfolios List tab
Alt + C	Transactions	Portfolios List tab
Ctrl + L	Login	Portfolios tab / Main Menu
Ctrl + O	Open (another dataset)	Portfolios tab / Main Menu
F2	Select New Portfolio	Portfolio Details
Alt + Y	Bill History	Portfolio Details
Alt + B	Balances	Portfolio Details
Ctrl + N	New transaction	Transaction Grid
Ctrl + E	Edit transaction	Transaction Grid
Ctrl + A	Select all transactions	Transaction Grid
Ctrl + Shift + C	Copy selected transaction	Transaction Grid
Ctrl + Shift + V	Paste selected transaction	Transaction Grid
Ctrl + Shift + I	Invert selection	Transaction Grid
Ctrl + L	Details	Transaction Grid
Ctrl + T	Filter	Transaction Grid
Ctrl + I	Filter Settings	Transaction Grid
Ctrl + +	Zoom In	Transaction Grid
Ctrl + -	Zoom Out	Transaction Grid
Ctrl + 1	100% View	Transaction Grid
Ctrl + \$	Show Cash Balance	Transaction Grid
Ctrl + #	Show Share Balance of selected transaction	Transaction Grid
Alt + N	New security, price, bill spec, bill form, model, target, categories	Security, Price, Billing, Models and Categories tabs
Alt + L	Delete	Security, Price, Billing Models, and Categories tabs
Alt + C	Combine	Security tab
Alt + Y	Price History	Security tab

Shortcut	Description	Program Area
Alt + I	Income	Security tab
Alt + P	Split	Security tab
Alt + R	View Price Blotter	Price tab
Alt + C	Change As Of and Price Date	Global Reports tab, Portfolio Reports
Alt + P	Change Report Profile	Global Reports tab, Portfolio Reports
Alt + A	Header Settings	Global Reports tab, Portfolio Reports
Alt + R	Run selected report	Global Reports tab, Portfolio Reports
Alt + G	Go to Assignments	Billing tab, Models tab
Alt + U	Update Billing History	Billing tab
Alt + W	Download	Interfaces tab
Alt + V	Convert Interface File	Interfaces tab
Alt + U	Unpost Transaction File	Interfaces tab
Alt + M	Modify Category	Categories tab
Alt + I	Import Categories	Categories tab