

CODY JONES

# ActivityHD: Back to Basics



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ActivityHD Keystrokes

## Disclaimer

A FEW THINGS FIRST

**This presentation is for information only.**

Evaluate risks before acting based on ideas from this presentation.

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# Cody Jones

CPA, IMPLEMENTATION TEAM



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## BASICS QUIZ

# What does the HD in 'ActivityHD' stand for?



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## BASICS QUIZ

# Assets – Liabilities = ?



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## BASICS QUIZ

# Who should you contact for ActivityHD support?

- A. Email Cody
- B. Email Brett
- C. Email [support@accountingware.com](mailto:support@accountingware.com)
- D. Call Lori



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# Agenda

HERE'S THE PLAN



1. Online Help Resources
2. HD View
3. Lookup and Filters
4. Column Filters
5. Spotlight – Date Expressions
6. Action Buttons
7. One Stop Shop
8. Saved Answers



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## Help Us, Help You!


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# Online Resources



## ACTiViTYHD

### Help Text

- [www.AccountingWare.com/help](http://www.AccountingWare.com/help)
- Table of Contents
- Search field
- Press F1 or  in ActivityHD for quick access to help
- Webinars

### Release Notes

- [www.AccountingWare.com/rn](http://www.AccountingWare.com/rn)
- View the latest and greatest features coming your way
- Browse by version number
- Browse by package
- Prompted to view the first time you log in after an upgrade

## ACTiVReporter

Powered by ActivityHD

### Help and More

- [www.AccountingWare.com/activreporterhelp](http://www.AccountingWare.com/activreporterhelp)
- Search field
- Release notes
- Quick Links
- FAQs
- Training Videos

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ActivityHD Help Text Video 1 [mp4]

ActivityHD Help Text Video 2 [mp4]

ActivReporter Help Text [mp4]



# Orientation 101

BASIC TERMINOLOGY

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**Navigation Pane**

**HD View**

**AP Invoices for Demo Aspire**

Batch - #	Vendor	Invoice #	Date	PO #	Amount	B...
BA - 8	Koyal	123	4/21/2022	00176	1,299.54	1,...
Commit - 18	Koyal	00177-01	4/21/2022	00177	1,339.50	1,...
		21321231	11/30/2021	00161	2,110.65	2,...
		2123121	11/30/2021	00170	4,110.65	4,...
APPO - 4	Hope	Exp 113021	11/30/2021		390.57	39...
APPO - 5	WFCredit	113021	11/30/2021		2,987.60	2,...
Commit - 13	Koyal	00171-01	11/30/2021	00171	6,145.47	6,...
Commit - 14	HomeDecor	00161-01	11/30/2021	00161	-2,110.65	0.00
AP - 29	HomeDecor	32123123121	11/16/2021	00166	2,250.00	2,...
AP - 30	Koyal	2123123	11/16/2021	00115	3,680.84	3,...
Commit - 10	HomeDecor	00167-01	11/16/2021	00167	2,500.00	2,...

Total: 998 | Selected: 1 Amount: 1,299.54 Balance: 1,299.54 | Order: \*Date | Hint: Edit the selected AP Invoice

**InterActiv CONFERENCE**

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**Menu Button**

**Tool Bar Action Buttons**

**Status Bar**

**AP Invoices for Demo Aspire**

Batch - #	Vendor	Invoice #	Date	PO #	Amount	B...
BA - 8	Koyal	123	4/21/2022	00176	1,299.54	1,...
Commit - 18	Koyal	00177-01	4/21/2022	00177	1,339.50	1,...
AP - 32	HomeDecor	21321231	11/30/2021	00161	2,110.65	2,...
AP - 34	HomeDecor	2123121	11/30/2021	00170	4,110.65	4,...
APPO - 4	Hope	Exp 113021	11/30/2021		390.57	39...
APPO - 5	WFCredit	113021	11/30/2021		2,987.60	2,...
Commit - 13	Koyal	00171-01	11/30/2021	00171	6,145.47	6,...
Commit - 14	HomeDecor	00161-01	11/30/2021	00161	-2,110.65	0.00
AP - 29	HomeDecor	32123123121	11/16/2021	00166	2,250.00	2,...
AP - 30	Koyal	2123123	11/16/2021	00115	3,680.84	3,...
Commit - 10	HomeDecor	00167-01	11/16/2021	00167	2,500.00	2,...

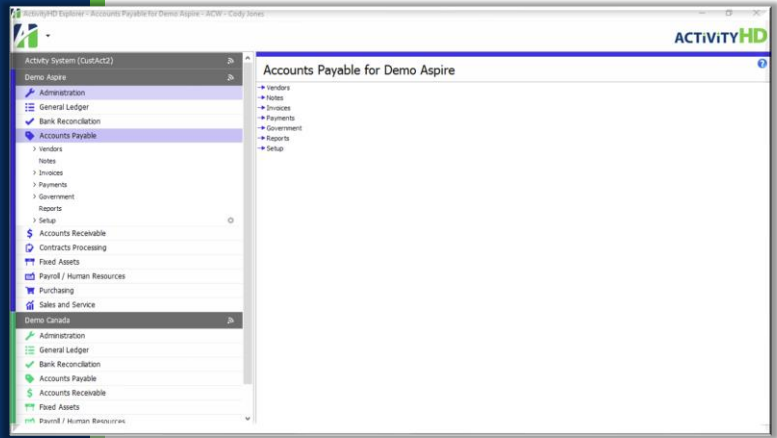
Total: 998 | Selected: 1 Amount: 1,299.54 Balance: 1,299.54 | Order: \*Date | Hint: Edit the selected AP Invoice

**InterActiv CONFERENCE**

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# Navigation Pane

- Companies
- Packages
- Setup folders
- Click to expand/collapse
- Color coded by company
- Connected
- Company running
- Open in new window
- Settings remembered



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Navigation Pane [mp4]

# HD View

- Custom Made to Fit
- Complete Table of Your Data

Code	Description	Class	Terms	AP Account Mask	Customer #	Federal ID
ACS	ACS Services	Payroll	UponReceipt	2100-01-00000-A	0123456	
Advertising Inc.	Advertising Inc.				Advertising	
Ally	Ally Payment Processing	Financial	Due30	2100-01-00000-A	054-6325-95678	23-1545778
AmerFunds	American Funds	Payroll	UponReceipt	2100-01-00000-A	09876543	
AtmosCorp	Atmos Energy	Utility	Net10	2100-01-00000-A	1654623	65-2588315
AtmosDallas	Atmos Energy	Utility	Cash	2100-01-00000-A	6549632	65-2588315
ATT	AT&T Phone	Utility	Cash	2100-01-00000-A	32651232	36-1247560
Barnfield	Mollie Barnfield	Employee	UponReceipt	2100-01-00000-A		466-15-5555
Birthday	Birthday Express	Supplier	Net15	2100-01-00000-A	ZP1231082	36-8599410
Cake	Cake Creations	Service	Cash	2100-01-00000-A	456	65-9522005
Choice	Choice Billboards	Service	Net10	2100-01-00000-A	3569	
CoNetrix	CoNetrix Technology	Service	Cash	2100-01-00000-A	456	
Confections	Confections	Service	UponReceipt	2100-01-00000-A	LM36258	36-5841987
CORNER BAKERY	Catering	Supplier				
Disc	Disc Jockeys of Dallas	Service	Net10	2100-01-00000-A	sdfgdfg	35-6974572
DJArtist	DJ Artist	Service	UponReceipt	2100-01-00000-A	236	257-68-9456
Drapes	Drapes, Decor, and More	Supplier	Net10	2100-01-00000-A	26457HG1	74-2514362
eFavor	eFavorMart.com	Supplier	Net10	2100-01-00000-A	3625162	23-6958455
Elite	Elite Designs	Service	Net10	2100-01-00000-A	3526	15-6932854
FedEx	FedEx Corporation	Misc	Net15	2100-01-00000-A	321659486	25-4432870
Gables	Gables Greenhouse	Supplier	Net10	2100-01-00000-A	1231	25-6525448
Gourmet	Gourmet Caterers	Service	Net10	2100-01-00000-A	40123	526-12-3511
Gray	James Gray	Employee	UponReceipt	2100-01-00000-A		
Hartford	Hartford Insurance	Insurance	Net15	2100-01-00000-A	654321654	65-2536558
HomeDecor	Home Decorators Collection	Supplier	Net15	2100-01-00000-A	5263152-0194	25-8471241
Hope	Emily K. Hope	Employee	UponReceipt	2100-01-00000-A		
House	Dallas House of Flowers	Supplier	Net10	2100-01-00000-A	21212	42-0095475
IRS	Internal Revenue Services	Payroll	UponReceipt	2100-01-00000-A		
Koyal	Koyal Wholesale Supplies	Supplier	Net30	2100-01-00000-A	A74512	65-9288236
Kysco	Kysco Food Services	Supplier	Net10	2100-01-00000-A	36251	32-6647158



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# Create Meaningful and Useful Views

1

Change columns to choose what data you see

Limit with filters and the lookup field

2

3

Select rows for review

Use the status bar instead of running a report

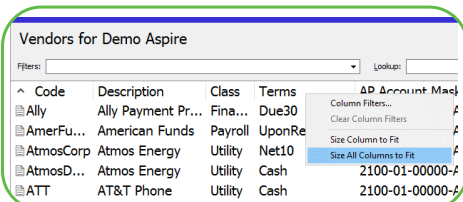
4



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## Rearranging

Drag and drop columns to rearrange the display.



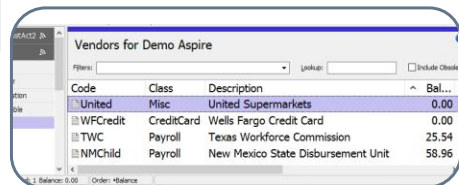
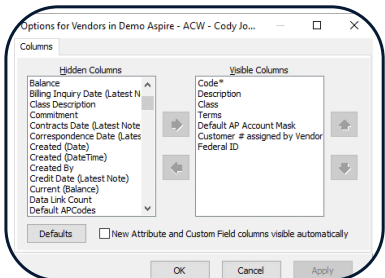
## Sizing

Right click on the column headings for sizing options.

## Change Columns

## Adding and Removing

Right click in the HD pane and choose options to change column display.



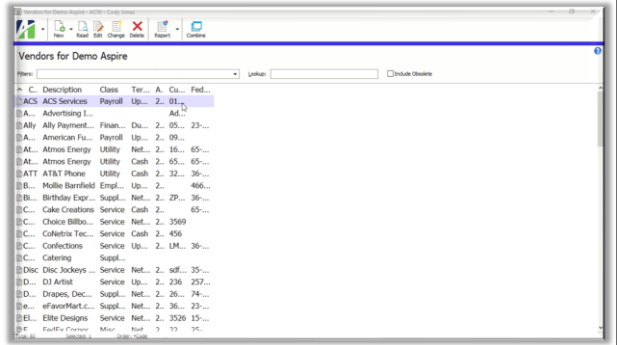
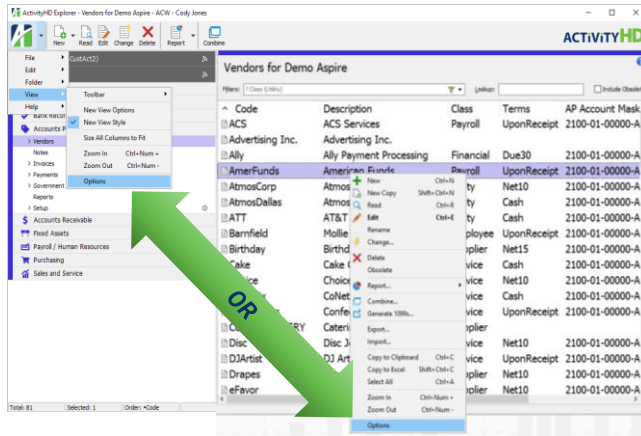
## Sorting

Sort options display in the status bar.

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# Add and Remove Columns with Options



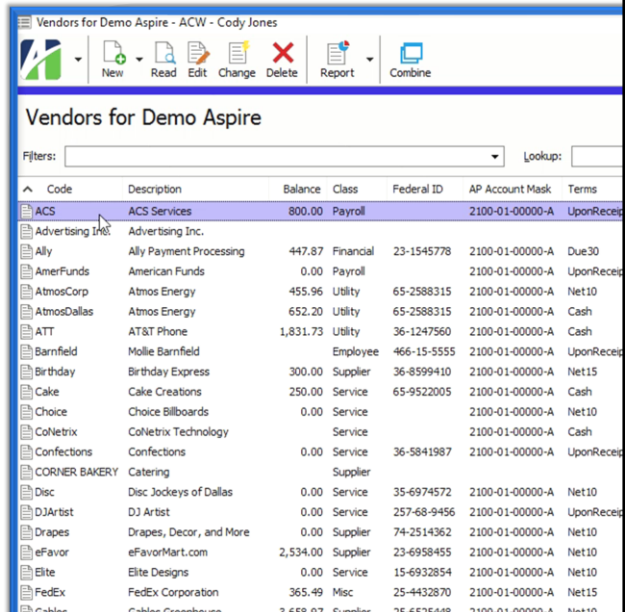
17

Add and Remove Columns [mp4]

ZOOM, ZOOM! CAN YOU SEE ME NOW?



# Enlarge and minimize text in the HD view using Ctrl + and Ctrl -



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# Copy the Data

- Copy to Clipboard (Ctrl+C)
- Copy to Excel (Shift+Ctrl+C)



ActivityHD Explorer - Vendors for Demo Aspire - ACW - Cedy Jones

Activity System (OutAct2)

Demo Aspire

Vendors for Demo Aspire

Filters: Vendors with Balances

Code	Description	Balance	Class	Terms	AP Account Mask	Cu
ACS	ACS Services	800.00	Payroll	UponReceipt	2100-01-00000-A	01
Ally	Ally Payment Processing	447.87	Financial	Due30	2100-01-00000-A	05
AtmosCorp	Atmos Energy	455.96	Utility	Net10	2100-01-00000-A	16
AtmosDallas	Atmos Energy	652.20	Utility	Cash	2100-01-00000-A	65
ATT	AT&T Phone	1,831.73	Utility	Cash	2100-01-00000-A	32
Birthday	Birthday Express	300.00	Supplier	Net15	2100-01-00000-A	ZP
Cake	Cake Creations	250.00	Service	Cash	2100-01-00000-A	
eFavor	eFavorMart.com	2,534.00	Supplier	Net10	2100-01-00000-A	36
FedEx	FedEx Corporation	365.49	Misc	Net15	2100-01-00000-A	32
Gables	Gables Greenhouse	3,658.97	Supplier	Net10	2100-01-00000-A	12
HomeDecor	Home Decorators Collection	4,204.15	Supplier	Net15	2100-01-00000-A	52
House	Dallas House of Flowers	1,256.79	Supplier	Net10	2100-01-00000-A	21
LACHild	Louisiana Child Support	62.76	Payroll	UponReceipt	2100-01-00000-A	
Landry	Dallas Landlord	5,000.00	Rent	Cash	2100-01-00000-A	25
LPL	Lubbock Power & Light	673.41	Utility	Net15	2100-01-00000-A	96
Midtown	Midtown Media	1,234.56	Service	Net30	2100-01-00000-A	L1
Milton	Milton Photography	1,025.67	Service	UponReceipt	2100-01-00000-A	52
Monford	Monford Gardens	1,056.77	Supplier	Net10	2100-01-00000-A	75



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Copy [mp4]



# Lookup and Filters

LIMIT THE DATA

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# Use lookup and filter to locate specific records



**Convenient  
Lookup**



**Powerful  
Filters**



**Column Filters**  
for *quick on-the-fly*  
filtering



21 [Convenient Lookup \[mp4\]](#)

[Powerful Filters \[mp4\]](#)

[Column Filters \[mp4\]](#)



# Date Expressions

SPOTLIGHT

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# Shortcuts and Ways to Automate Dates

## WITH DATE EXPRESSIONS!

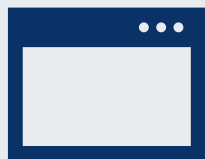
Anytime you see the calendar icon you can use Date Expressions to quickly or automatically fill out dates.

- Quickly fill in a date with shortcuts
- Automatically calculate a desired date



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[Automate Dates Shortcuts \[mp4\]](#)



# Selection and Status Bar

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# Analyze right in the HDView!

- Single click to choose one row
- Ctrl + A to select all
- Ctrl + Click to select multiple
- Click and Ctrl+Shift+Click to select a range
- Click and Ctrl+Shift+PageUp or PageDown to select all visible rows
- Click and Ctrl+Shift+Home or End to select all rows above or below

## Selection

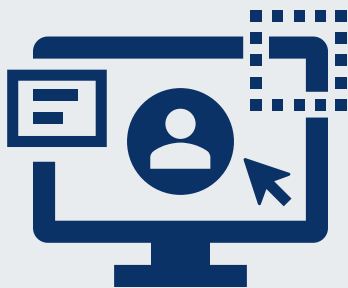
- How many items are in the view
- How many items are selected
- Totals on almost all amount columns without a report or export to Excel
- Sorting Options

## Status Bar



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HD View [mp4]



# Action Buttons

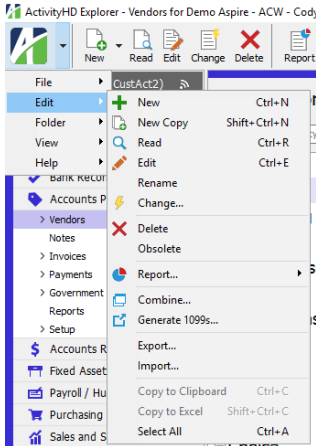
26

# Actions and Options



CHOOSE A NAVIGATION TECHNIQUE YOU LIKE!

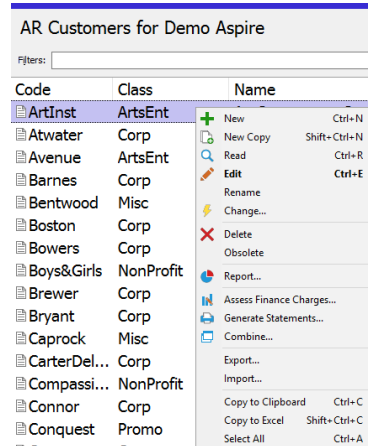
## Menu Button



## Tool Bar



## Right Click



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**New**  
(Ctrl+N)

Open a new entry form

**New Copy**  
(Shift+Ctrl+N)

Create a copy of an existing record

**Read/Edit**  
(Ctrl+E/Ctrl+R)

Open or place a record in **Edit** or **“Read Only”** mode

**Delete or Obsolete**

Remove the selected record from the system

Common Actions

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# Change

- Apply a change to multiple records at the same time.
- Apply multiple changes to multiple records at the same time.



ActivityHD Explorer - Vendors for Demo Aspire - ACSP - Cindy Torres

Activity System (CSPACT2) - Vendors for Demo Aspire

Code	Description	Balance	Class	Terms	AP Account Mask	Cus
ACS	ACS Services	800.00	Payroll	UponReceipt	2100-01-00000-A	011
Advertising Inc.	Advertising Inc.					Ad
Ally	Ally Payment Processing	447.87	Financial	Due30	2100-01-00000-A	05f
AmerFunds	American Funds	0.00	Payroll	UponReceipt	2100-01-00000-A	09f
AtmosCorp	Atmos Energy	455.96	Utility	Net10	2100-01-00000-A	16f
AtmosDallas	Atmos Energy	652.20	Utility	Cash	2100-01-00000-A	65f
ATT	AT&T Phone	1,831.73	Utility	Cash	2100-01-00000-A	32f
Barnfield	Mollie Barnfield		Employee	UponReceipt	2100-01-00000-A	
Birthday	Birthday Express	300.00	Supplier	Net15	2100-01-00000-A	ZP
Cake	Cake Creations	250.00	Service	Cash	2100-01-00000-A	
Choice	Choice Billboards	0.00	Service	Net10	2100-01-00000-A	35f
CoMetric	Colletrix Technology		Service	Cash	2100-01-00000-A	45f
Confections	Confections	0.00	Service	UponReceipt	2100-01-00000-A	LH
CORNER BAKERY	Catering		Supplier			
Disc	Disc Jockeys of Dallas	0.00	Service	Net10	2100-01-00000-A	adf
DJArtist	DJ Artist	0.00	Service	UponReceipt	2100-01-00000-A	23f
Drapes	Drapes, Decor, and More	0.00	Supplier	Net10	2100-01-00000-A	26f
eEquip	eEquipMart.com	7,534.00	Supplier	Net10	2100-01-00000-A	26f



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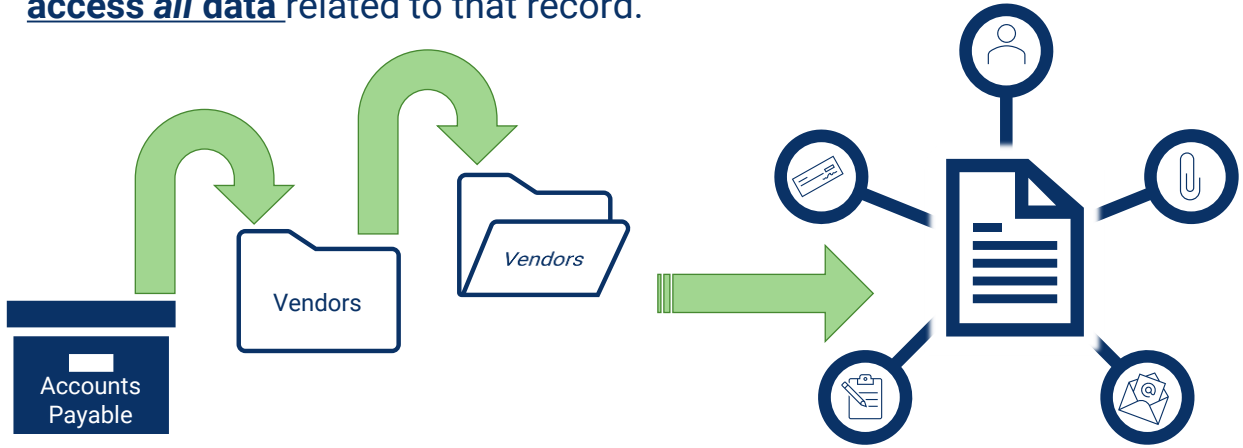
Change [mp4]



# One Stop Shop

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In ActivityHD records are **smart** and act as a 'one stop shop' that use tabs to **access all data** related to that record.



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# Keeping Tabs on Your Data

## Nested tabs for even more details

## One Stop Shop

AR Customer - "ArtInst" for Demo Aspire - ACW - Cody Jones

Code: ArtInst Name: Art Instructors, Inc.

Invoices Invoice Detail Recurring

AR Invoices

Batch - #	Cust...	M...	Inv...	Date	Amount	Balance	Description
lmb - 320	ArtInst		00036	4/15/2022	12,703.64	12,703.64	Community Art Exhibi
lmb - 319	ArtInst		00040	4/12/2022	10,152.30	10,152.30	Spring Break Acting C
lmb - 318	ArtInst		00046	4/7/2022	6,054.16	6,054.16	Summer Enrollment P
lmb - 317	ArtInst		00103	4/5/2022	4,327.21	4,327.21	
lmb - 181	ArtInst	243	00214	5/23/2014	5,723.95	0.00	Summer Enrollment P
lmb - 189	ArtInst	272	00223	5/23/2014	6,196.18	0.00	Summer Enrollment P
lmb - 190	ArtInst	255	00214	5/23/2014	-5,723.95	0.00	Summer Enrollment P
lmb - 104	ArtInst	135	00136	12/10/2013	1,602.18	0.00	winter recital and rec
lmb - 71	ArtInst	102	00103	9/25/2013	4,327.21	0.00	
lmb - 25	ArtInst	48	00046	5/28/2013	6,054.16	0.00	Summer Enrollment P

Customer: Data Links Contacts Locations Invoices Receipts Statements Summary Invoices Notes Other

Edit Total: 12 Selected: 1 Amount: 12,703.64 Balance: 12,703.64 Order: \*Date

Vendor - "Ally" for Demo Aspire - ACW - Cody Jones

Code: Ally Description: Ally Payment Processing

Class: Financial

Controls:
 

- Miscellaneous
- On Purchase Hold
- Require PO Number
- On Payment Hold

Invoice Grouping:
 

- Location
- Location, AP Account
- One Invoice per Payment
- Process Default

Identification:
 

- Customer #: 054-6325-95678
- Filing Status: C Corporation
- Federal ID: \*\*\*\*\*
- State ID: \_\_\_\_\_
- Other ID: \_\_\_\_\_

Duplicate Invoice Controls:
 

- Invoice Number
- Date
- Amount
- AP Account

Last Contractor Report: \_\_\_\_\_

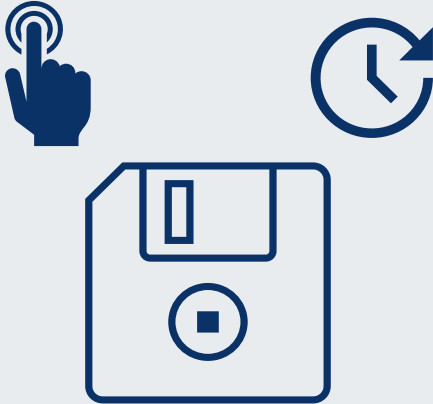
Separate 1099 Form

Vendor Defaults PO Custom Data Links Locations Contacts Notes Invoices Payments 1099s Purchases Orders Attachments Other



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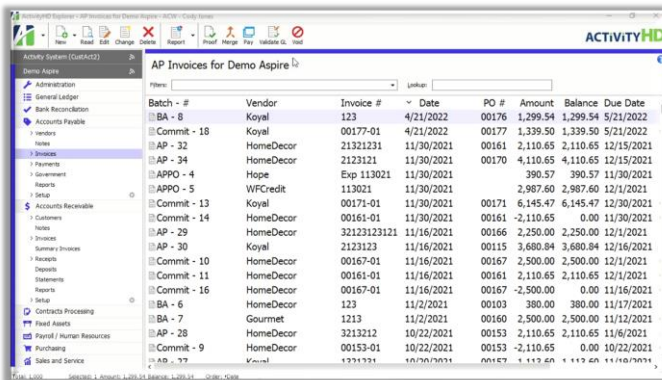


# Saved Answers

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## Saved Answers help remember settings for faster processing

- Pre-filled screens for paying invoices, printing invoices, processing time sheets, etc.
- Memorized report settings like customer and vendor aging, GL reports by rollup or attribute, etc



Batch - #	Vendor	Invoice #	Date	PO #	Amount	Balance	Due Date
BA - 8	Koyal	123	4/21/2022	00176	1,299.54	1,299.54	5/21/2022
Commit - 18	Koyal	00177-01	4/21/2022	00177	1,339.50	1,339.50	5/21/2022
AP - 32	HomeDecor	21231231	11/30/2021	00161	2,110.65	2,110.65	12/15/2021
AP - 34	HomeDecor	2123121	11/30/2021	00170	4,110.65	4,110.65	12/15/2021
APPO - 4	Hope	Exp 113021	11/30/2021		390.57	390.57	11/30/2021
APPO - 5	WFCredit	113021	11/30/2021		2,987.60	2,987.60	12/1/2021
Commit - 13	Koyal	00171-01	11/30/2021	00171	6,145.47	6,145.47	12/30/2021
Commit - 14	HomeDecor	00161-01	11/30/2021	00161	-2,110.65	0.00	11/30/2021
AP - 29	HomeDecor	32123123121	11/16/2021	00166	2,250.00	2,250.00	12/1/2021
AP - 30	Koyal	2123123	11/16/2021	00115	3,680.84	3,680.84	12/16/2021
Commit - 10	HomeDecor	00167-01	11/16/2021	00167	2,500.00	2,500.00	12/1/2021
Commit - 11	HomeDecor	00161-01	11/16/2021	00161	2,110.65	2,110.65	12/1/2021
Commit - 16	HomeDecor	00167-01	11/16/2021	00167	-2,500.00	0.00	11/16/2021
BA - 6	HomeDecor	123	11/2/2021	00103	380.00	380.00	11/17/2021
BA - 7	Gourmet	1213	11/2/2021	00160	2,500.00	2,500.00	11/12/2021
AP - 28	HomeDecor	3213212	10/22/2021	00153	2,110.65	2,110.65	11/6/2021
Commit - 9	HomeDecor	00153-01	10/22/2021	00153	-2,110.65	0.00	10/22/2021
AP - 17	Koyal	1731731	10/20/2021	00157	1,112.60	1,112.60	11/10/2021

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Saved Answers [mp4]



THANKS FOR JOINING!

# ActivityHD: Back to Basics

Cody Jones, CPA

[support@accountingware.com](mailto:support@accountingware.com)  
[accountingware.com/help](https://accountingware.com/help)