

Keyboard shortcuts · around the job

GETTING AROUND A JOB

Ctrl / ⌘ + K	Open or close global search — type a page reference (e.g. A16 + Enter) or a workpaper name
Ctrl / ⌘ + 1...5	Jump straight to the 1st–5th search result (or your favourites, before you type)

DEFAULT FAVOURITES — HISTORICAL FINANCIAL AUDITS

Other template categories have their own set — press Ctrl / ⌘ + K to see the favourites for your template.

Ctrl / ⌘ + 1	Trial Balance
Ctrl / ⌘ + 2	Risk Identification
Ctrl / ⌘ + 3	Management Report
Ctrl / ⌘ + 4	Adjustments
Ctrl / ⌘ + 5	Risk Responses
↑ / ↓	Move through search results
Ctrl / ⌘ + S	Show or hide the sidebar
Ctrl / ⌘ + Enter	Open the job Summary
Alt / ⌥ + C	Open Contacts

MOVING AROUND A WORK PAPER

Three sizes of jump, all on the arrow keys — work → everything → pages. Whatever you land on is highlighted in blue, and Tab picks up from there.

→ / ←	Outstanding work — next / previous unanswered step; skips anything completed and wraps around
Alt / ⌥ + → ←	Every stop — every step, answered or not, and every item inside it (comments, attachments, risks...). Ctrl / ⌘ + arrows does the same
Alt / ⌥ + Shift + → ←	Whole work papers — next / previous top-level work paper
Alt / ⌥ + Shift + ↓ ↑	Whole pages — next / previous page, with every sub-page a stop too

Single tools on a page (like the work paper selector on the controls page) are one Alt + arrow stop — the steps inside aren't walked.

HOW SELECTION WORKS

A **step** selected (blue highlight) → the single letters answer the step. An **item** selected (ring around the card) → the letters act on that item. A few letters mean something on both (C, D, M, W) — the item wins. See the other side for both sets.

Alt / ⌥ + → ←	Walk onto the next / previous step or item — this is how you select an item with the keyboard
Click	Click a step or an item card to select it
Esc	Deselect the item and hand the letters back to its step — without moving anywhere
Tab	Carries on from whatever is selected — arrow to a step, then Tab straight into its fields
Shift + Tab	The same, backwards — steps back through the fields Tab walked into

None of the single letters fire while your cursor is in a text box — click out of the field, or press Esc, first.

FILLING IN FORMS

Ctrl / ⌘ + Enter	Save and close the form you're in
Enter	Save an inline field (table cell, trial balance row, new control)
Shift + Enter	Start a new line while editing a variable (Enter on its own saves)
Esc	Cancel without saving — a form, inline field, or mid-drag row

FORMATTING TEXT — in any rich text box

Ctrl / ⌘ + B	Bold
Ctrl / ⌘ + I	Italic
Ctrl / ⌘ + K	Add or edit a link (Esc closes the link panel)
Ctrl / ⌘ + A	Select everything in the box
Ctrl / ⌘ + Enter	Save and close

ATTACHING FILES

Shift / Ctrl / ⌘ + click	Choose several files at once in the file picker
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Keyboard shortcuts · steps & items

ANSWERING THE SELECTED STEP

Select a step, then press a single letter — no modifier keys. If a letter doesn't apply to the step, nothing happens.

Y	Answer Yes
N	Answer No
X	Answer Not Applicable
A	Open the Annotate composer — always available, even while an item is selected
C	Add a comment — also confirms Complete , Partner Complete and Compliance steps, adds a contact , and opens a text field for editing
U	Upload an attachment (this used to be on A)
W	Create a work paper
D	Set a deadline , or open the date picker on a date field
M	Open a multi-choice list — or set risk Medium
L	Set risk Low — or run a lead schedule over all accounts
H	Set risk High
F	Add a follow-up — or run a lead schedule over flagged accounts
O	Fill in the Other option on a multi-choice, other test, or compliance step
S	Skip to a step
T	Start a new table
I	Import / upload data (data source, trial balance)
Space	Open the step's response control — currently the multi-choice dropdown

ANNOTATIONS ON THE SELECTED STEP

Hold Alt/⌥ + Shift and press a letter (previously Ctrl/⌘ + Alt — retired). Comment, Attachment and Request are always available; the rest depend on your job type's template.

Alt / ⌥ + Shift + C	Comment
Alt / ⌥ + Shift + A	Attachment
Alt / ⌥ + Shift + J	Journal Entry
Alt / ⌥ + Shift + M	Management Point
Alt / ⌥ + Shift + D	Disclosure
Alt / ⌥ + Shift + P	Point Forward
Alt / ⌥ + Shift + I	Key Issue
Alt / ⌥ + Shift + R	Request
Alt / ⌥ + Shift + F	Follow Up
Alt / ⌥ + Shift + N	Review Note (reviewers only)

ACTING ON THE SELECTED ITEM

Items are the things inside a step — comments, attachments, work papers, risks... Arrow onto one with Alt/⌥ + → or click its card, then press its letter straight away, or open the menu first — both run the same actions.

Space	Open or close the item's ... actions menu — on cards with no ... menu (prior-year rows) it opens the right-click menu, where Bring Forward lives
↑ ↓	Move through the menu
Enter	Run the highlighted menu entry
Esc	Close the menu, keeping the item selected — Esc again deselects it

THE BUTTONS, AND THEIR LETTERS

Each letter works with the menu open or closed — the menu is just there to remind you. A letter is only live when its button is actually offered, so D can never delete something the card wasn't offering to delete.

E	Edit — on a prior-year item, editing and saving also brings it forward
B	Bring Forward (prior-year items only)
W	Download (attachments and documents)
M	Mark as Reviewed
V	Clear my review
C	Add Comment
R	Add / Edit Risk — same key for both; Remove Risk deliberately has no letter
D	Delete
U	Unpost (replaces Delete on posted receipts)

An item only offers the actions you're allowed to take — cross-reference cards carry no item actions at all.

INSIDE THE ANNOTATE COMPOSER

A	Opens the composer on the step's first annotation type
← →	Cycle through the annotation types, once the type strip has focus (Shift + Tab up to it, or click it)
Ctrl / ⌘ +	Save and close
Enter	
Esc	Cancel without saving