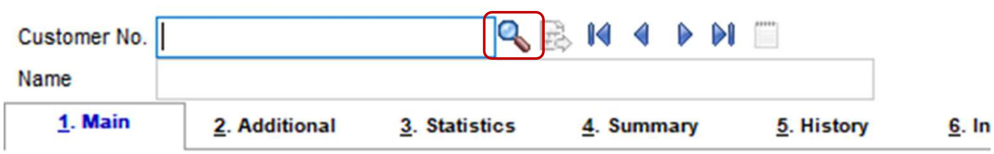
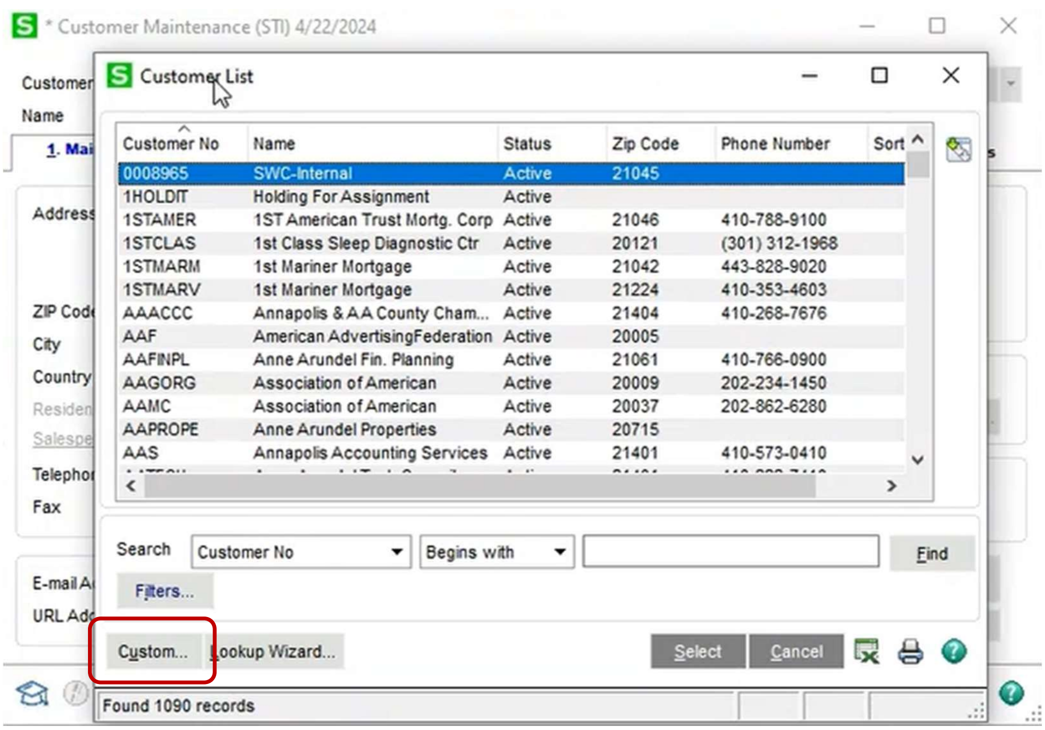
Creating Custom Lookup View

Custom lookup view can be used within any module in Sage that has a lookup view. For our example below we are using Customer Maintenance.

1. Accounts Receivable > Main > Customer Maintenance
2. Select the magnifying glass



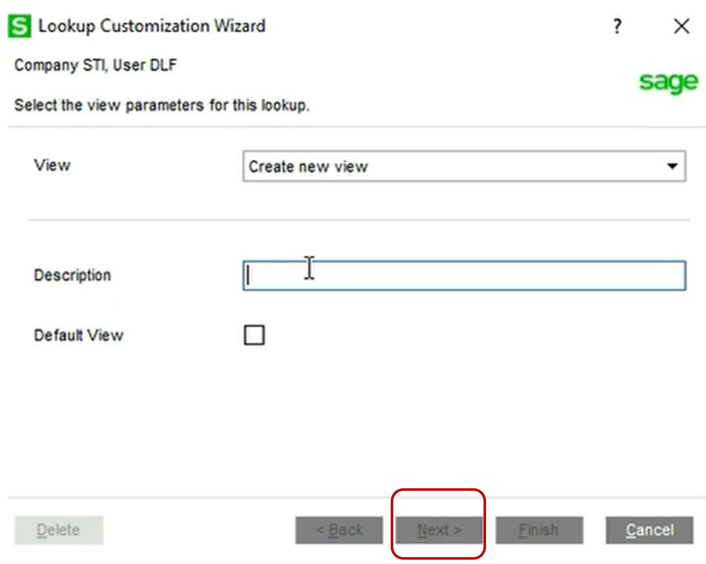
3. Customer List screen will pop up.
4. Select Custom



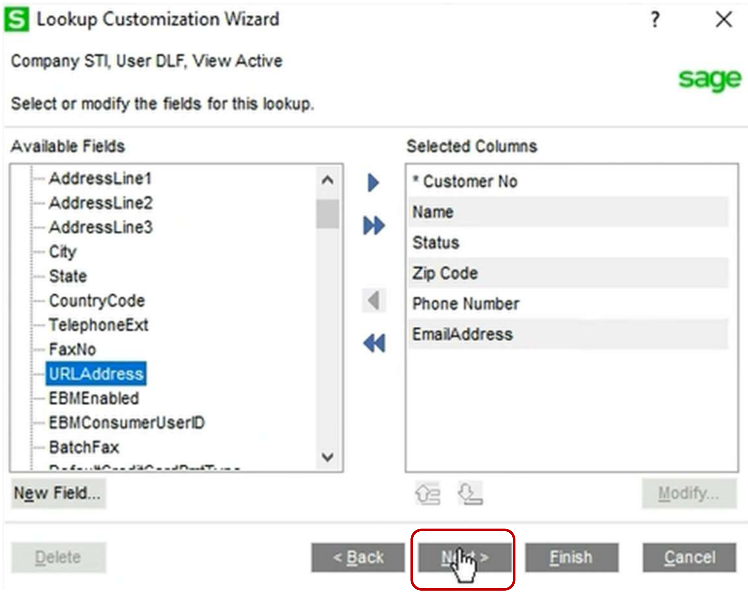
5. On the Lookup Customization Wizard page, in the View field, select "Create new view" and enter a description for the new view. Or select an existing view to modify it.

   a. To set the new lookup view as the default view, select the Default View check box. <u>This view is per Sage user</u>.

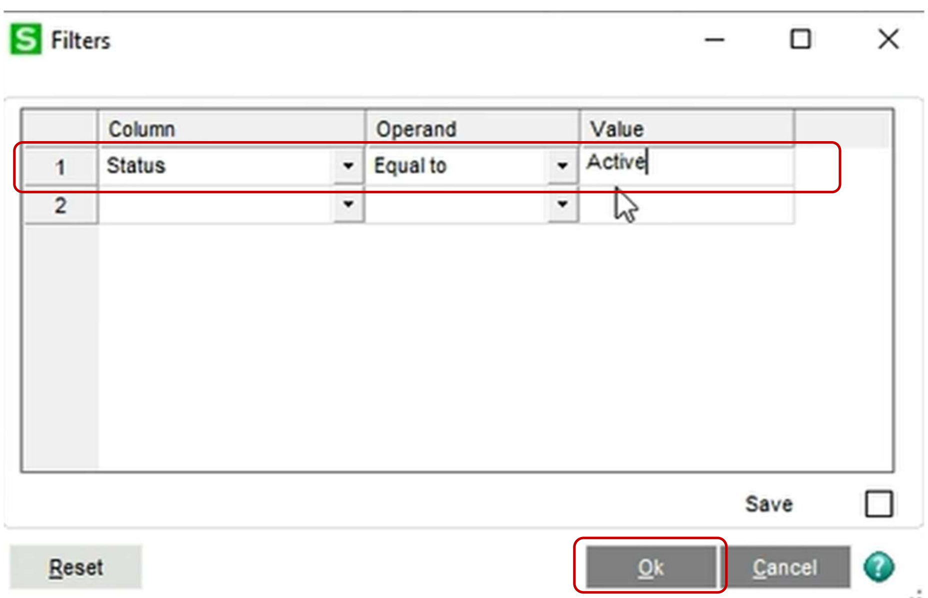
6. Select Next



7. In the second Lookup Customization Wizard page, add, remove, modify, or reorganize the fields for the lookup view in the Selected Columns list box.
   a. Note: In the Selected Columns list box, the *first* field/column (as indicated by an asterisk symbol "*" to the left) cannot be removed and cannot change its position as first.
   b. Note: Linked files from modules that are not activated also appear in the Available Fields field.
   c. Note: Use the blue arrows to add and remove the available fields or Selected Columns.



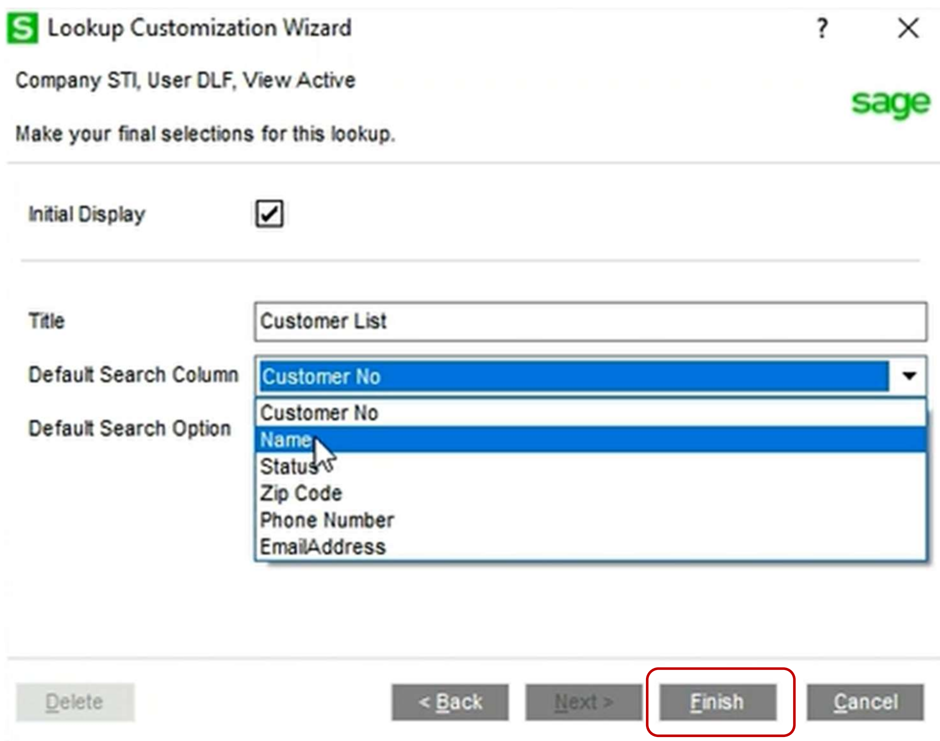
8. Use the third Lookup Customization Wizard page to add, delete, or modify filters.
    a. Select by Status and Operand by using the dropdown menu.
    b. If Selecting Active Customers, enter “Active” as the Value.
9. Select Next



10. In the final Lookup Customization Wizard page, make any final changes to the lookup view.

a. This allows the user to change the default search column from Customer No. to Name.

11. Select Finish



12. When you go back into the Customer List, you will see your custom filter view.