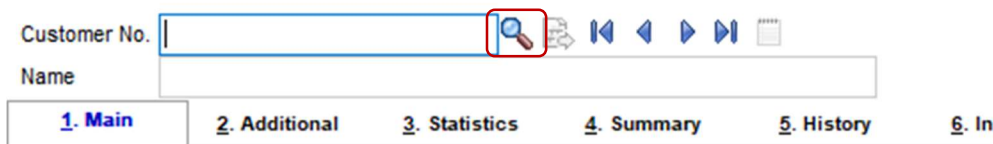


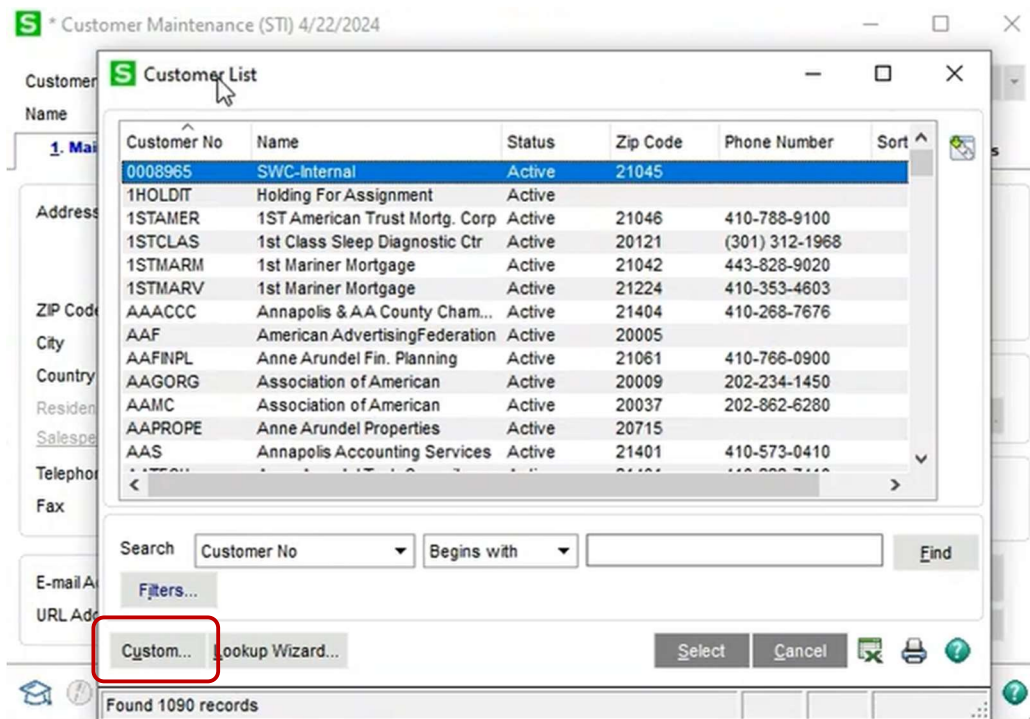
Creating Custom Lookup View

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

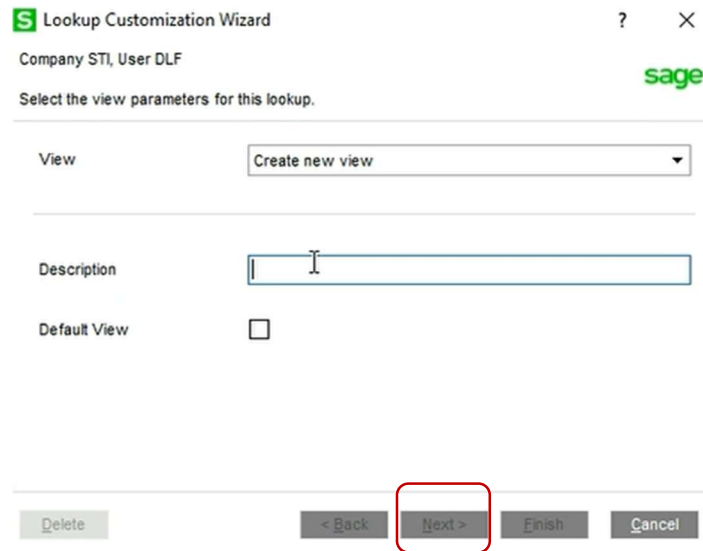


3. Customer List screen will pop up.
4. Select Custom

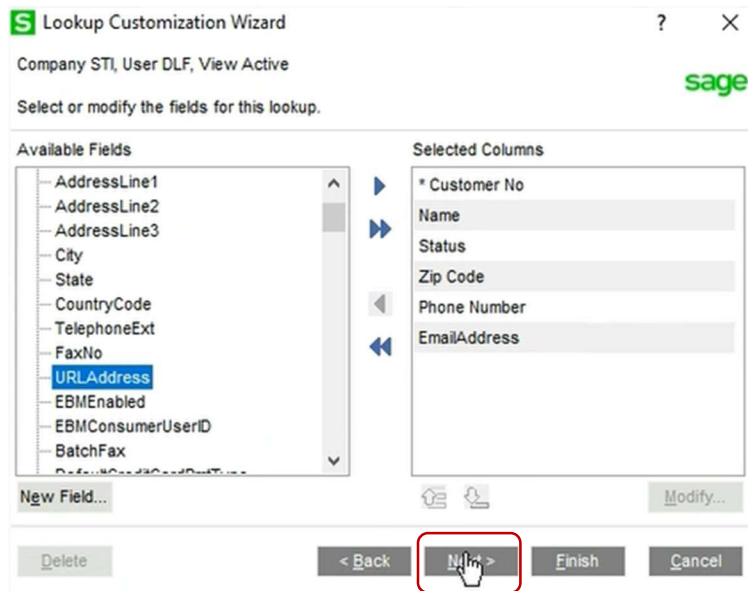


5. On the Lookup Customization Wizard page, in the View field, select "Create new view" and enter a description for the new view. Or select an existing view to modify it.

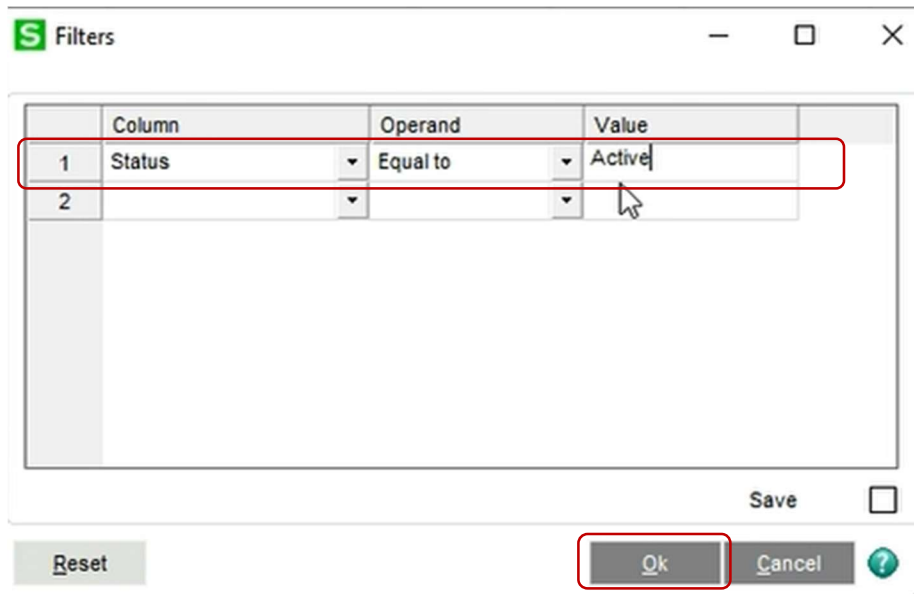
- a. To set the new lookup view as the default view, select the Default View check box. This view is per Sage user.
6. Select Next



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

Lookup Customization Wizard

Company STI, User DLF, View Active

Make your final selections for this lookup.

Initial Display

Title: Customer List

Default Search Column: Customer No

Default Search Option: Name

Buttons: Delete, < Back, Next >, Finish, Cancel

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

Customer No	Name	Status	Zip Code	Phone Number	Email Address
1HOLDIT	Holding For Assignment	Active			
1STAMER	1ST American Trust Mortg. Corp	Active	21046	410-788-9100	
1STCLAS	1st Class Sleep Diagnostic Ctr	Active	21021	(301) 312-1968	
1STMARM	1st Mariner Mortgage	Active	21042	443-828-9020	toml
1STMARV	1st Mariner Mortgage	Active	21224	410-353-4603	
AAACCC	Annapolis & AA County Cham...	Active	21404	410-268-7676	rbur
AAF	American Advertising Federation	Active	20005		
AAFINPL	Anne Arundel Fin. Planning	Active	21061	410-766-0900	sre
AAGORG	Association of American	Active	20009	202-234-1450	
AAMC	Association of American	Active	20037	202-862-6280	jfres
AAPROPE	Anne Arundel Properties	Active	20715		skor
AAS	Annapolis Accounting Services	Active	21401	410-573-0410	chri
AATECH	Anne Arundel Tech Council	Active	21401	410-222-7410	exd

Search: Name, Begins with: [] Find

Filters... View: *Active

Buttons: Custom..., Lookup Wizard..., Select, Cancel