How to Use the Custom Lookup Wizard

The magnifying glass is your lookup icon.

Click the Custom Button

Enter a description for your view. Click Next.
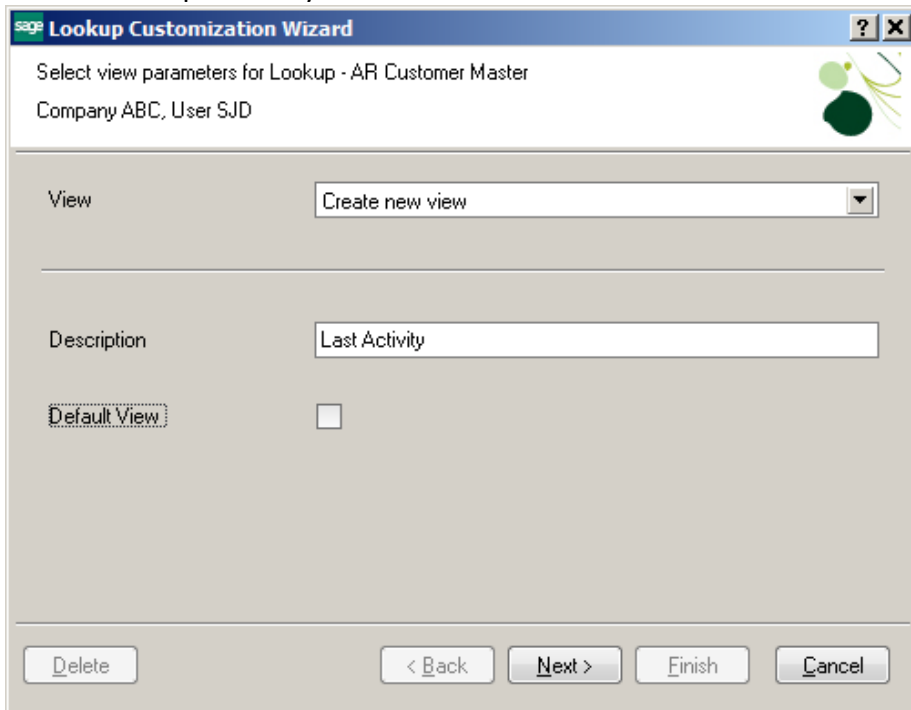
On the next screen there are two boxes. The box to the left is the available fields, the box to the right are the fields the lookup is currently using.

Remove any fields you don't want in the view by clicking on them, one at a time, then clicking the single blue arrow that points to the left.
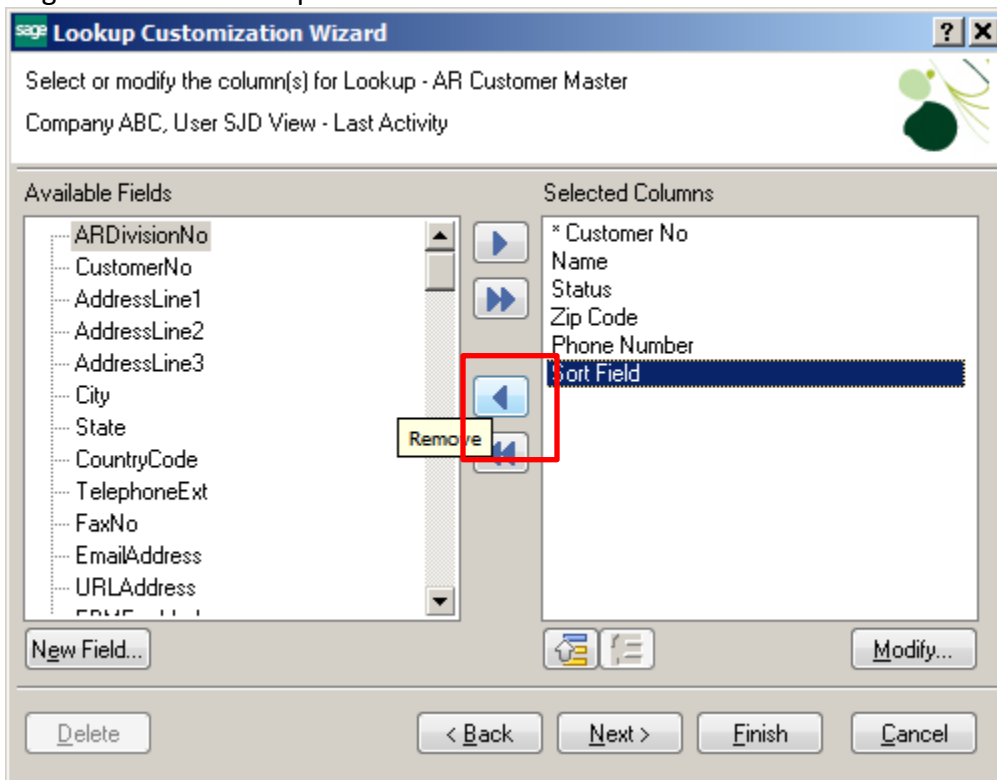
Select the fields from the box on the left that you would like to appear in your lookup. Click on the field and then click on the single blue arrow that points to the right. Click Next.
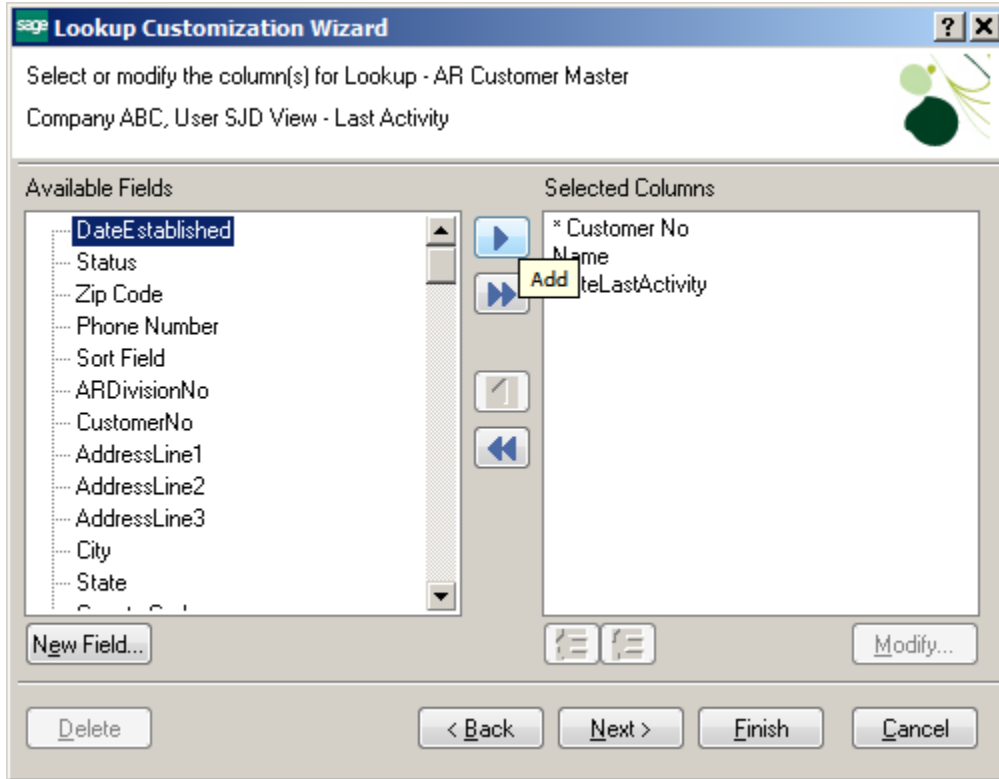
You can filter your data by selecting a column on the Filter screen and adding your condition. Then click Next.
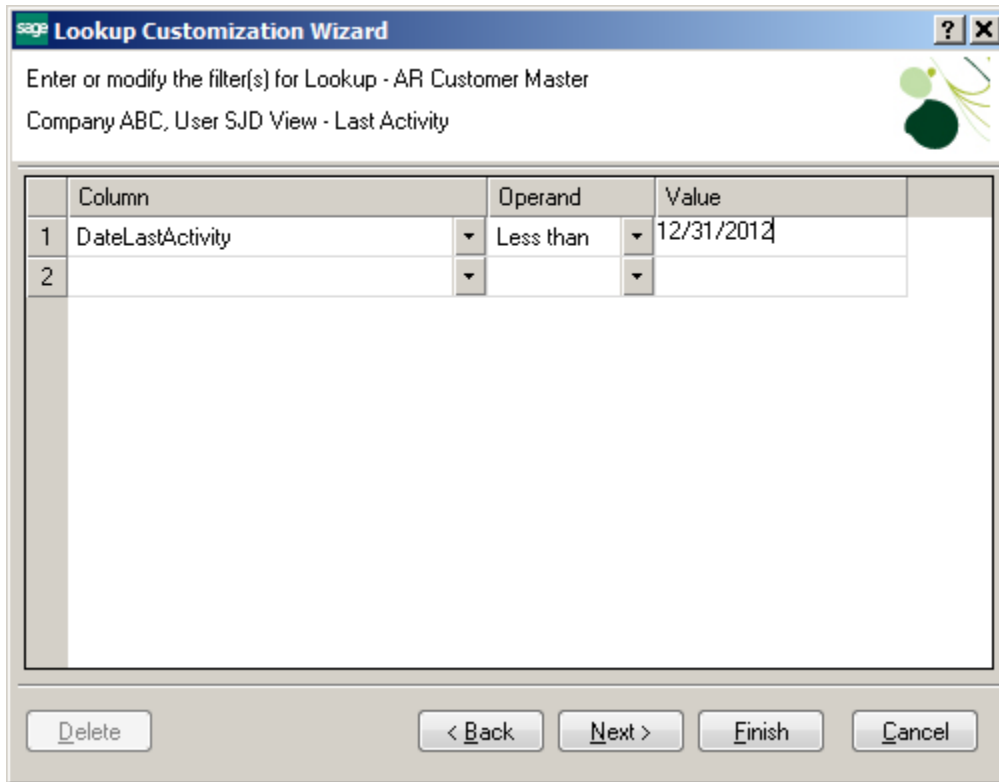
To change the Default Lookup field, click the down arrow and choose the column you would like to search by. You can also change the Default Search Option. Click Finish when done.
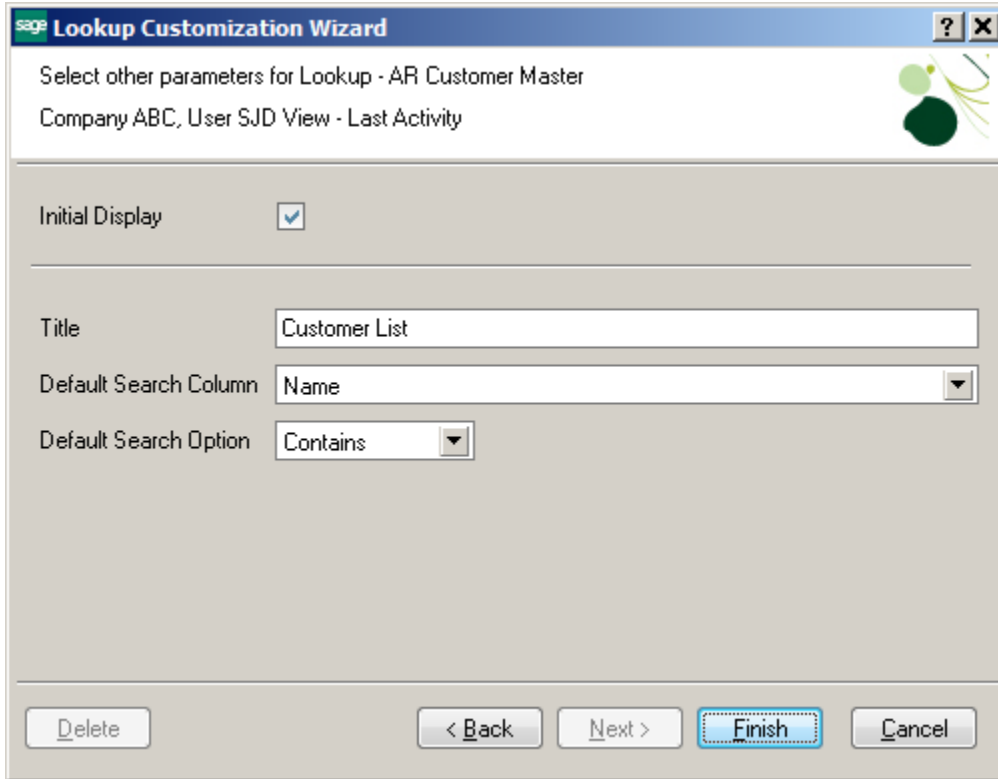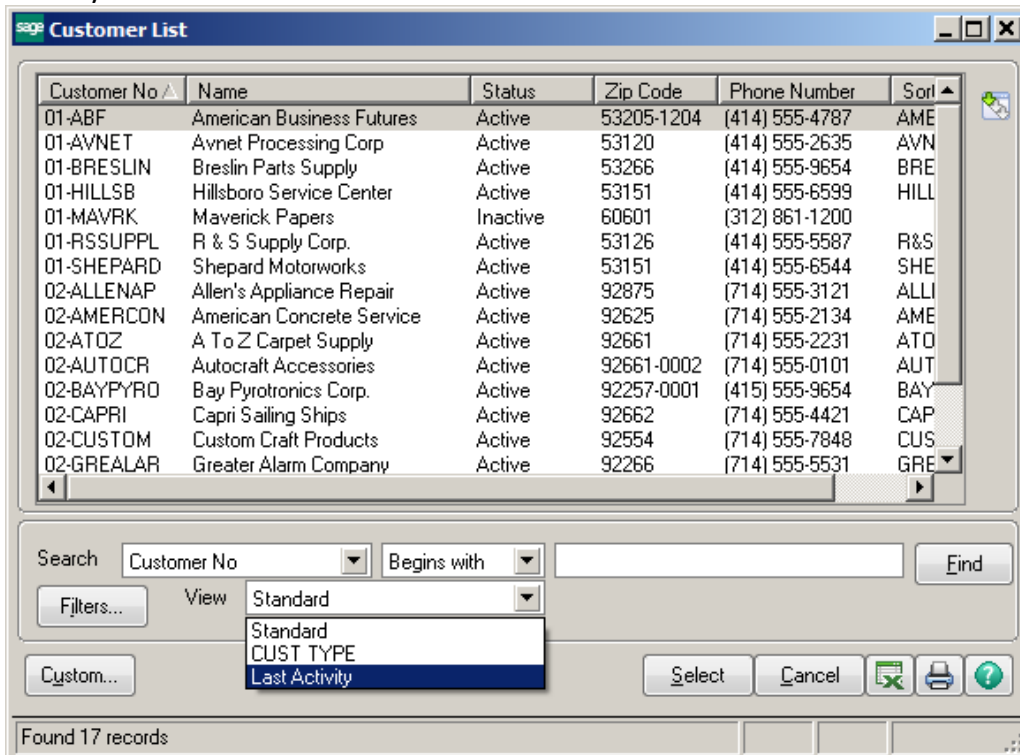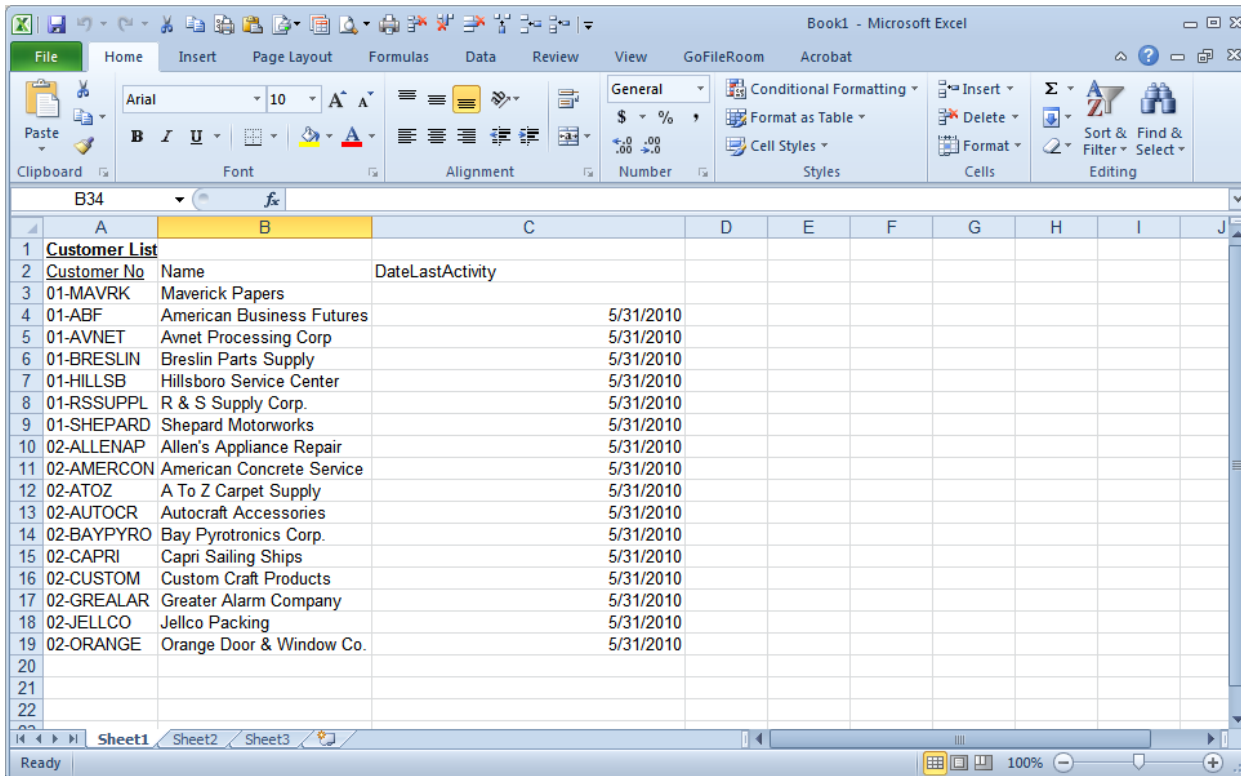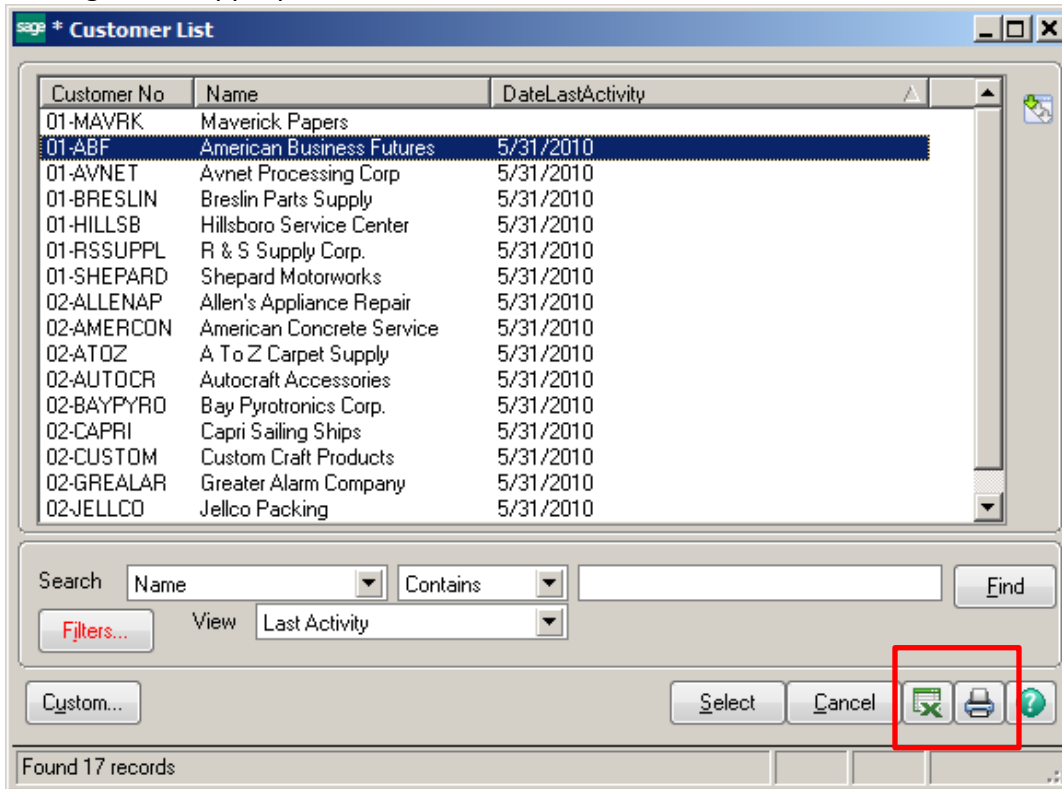

The system will come back to the Lookup screen. Click the down arrow next to View – Standard to select your new view.

You can Sort each column by clicking on the column. You can Print or Export the data to Excel by clicking on the appropriate icons.

How to create a Default View for all Employees

Click on Library Master\Main\User Lookup Wizard

Select the lookup table that you would like to modify, click New.
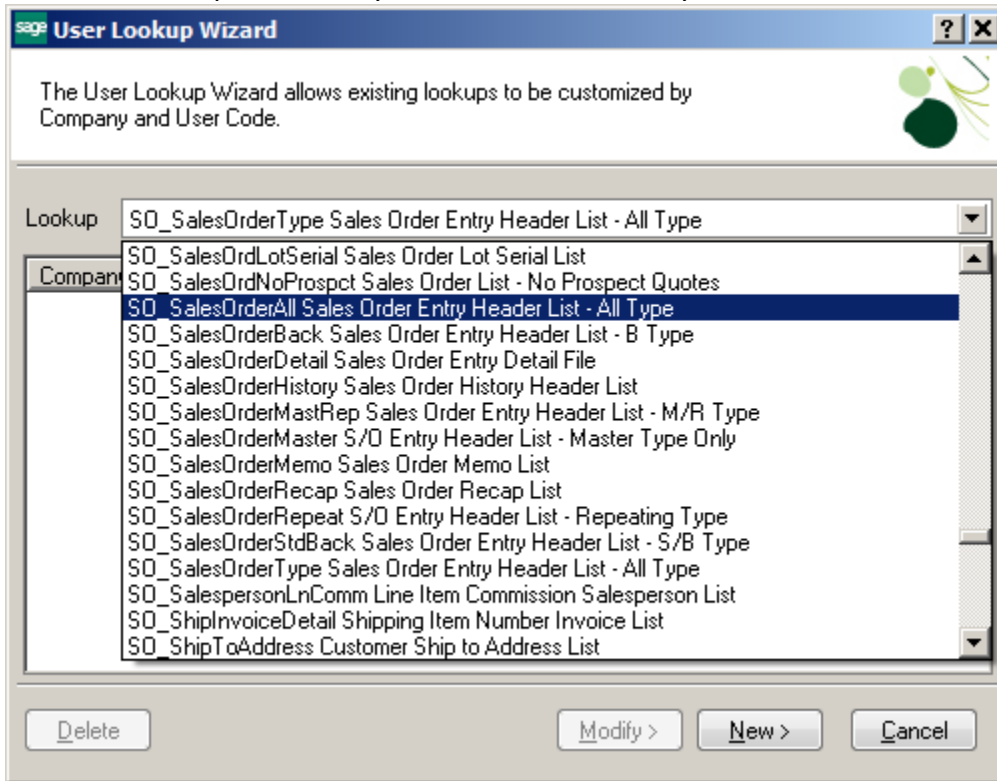
Select the specific company or ALL, then select ALL users. Click Next.
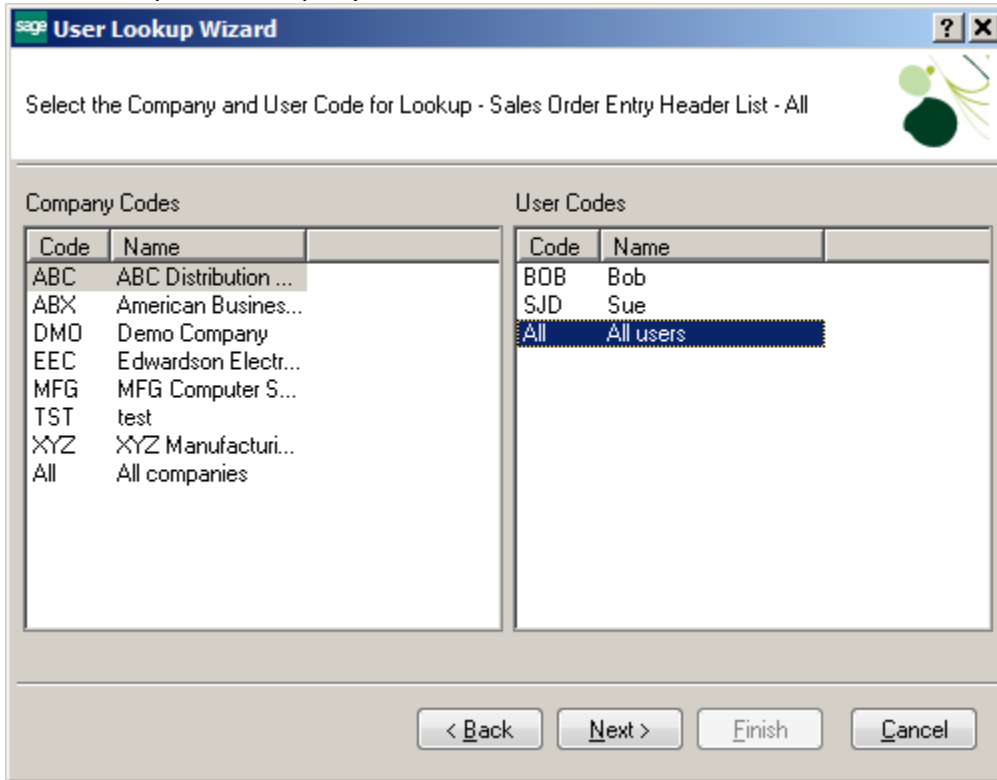
Select the columns that you would like the users to see when they click the magnifying glass for this lookup. Click Next.

If you want to filter the data, choose the column or columns to filter. Then click Next.

To modify the Default Search, choose the column from the drop down list. Then click Finish.

This will now be your default lookup for ALL users.

Bonus Round!

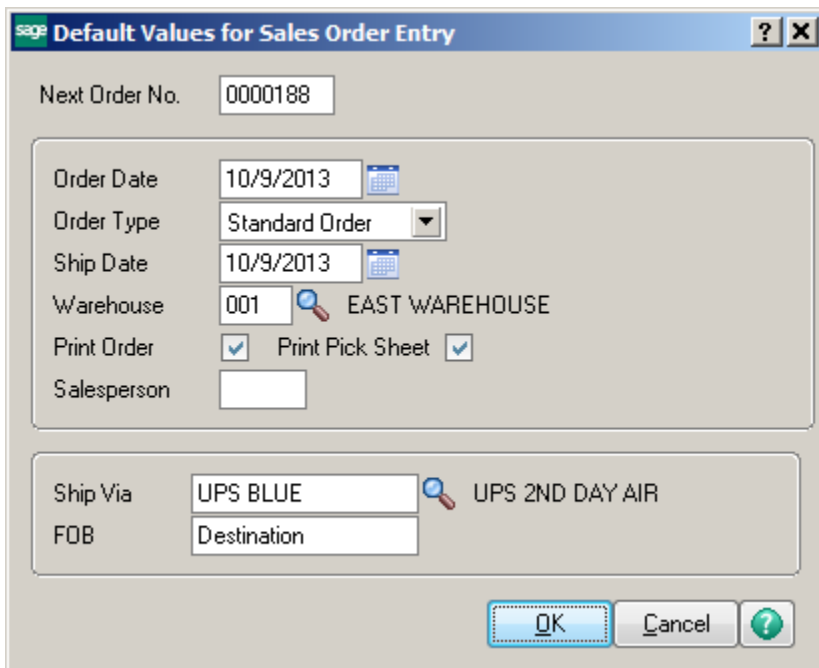The Defaults button is located in Sales Order Entry, Sales Order Invoice Entry and Purchase Order Entry. It is used to set defaults for your current and/or future entry sessions.
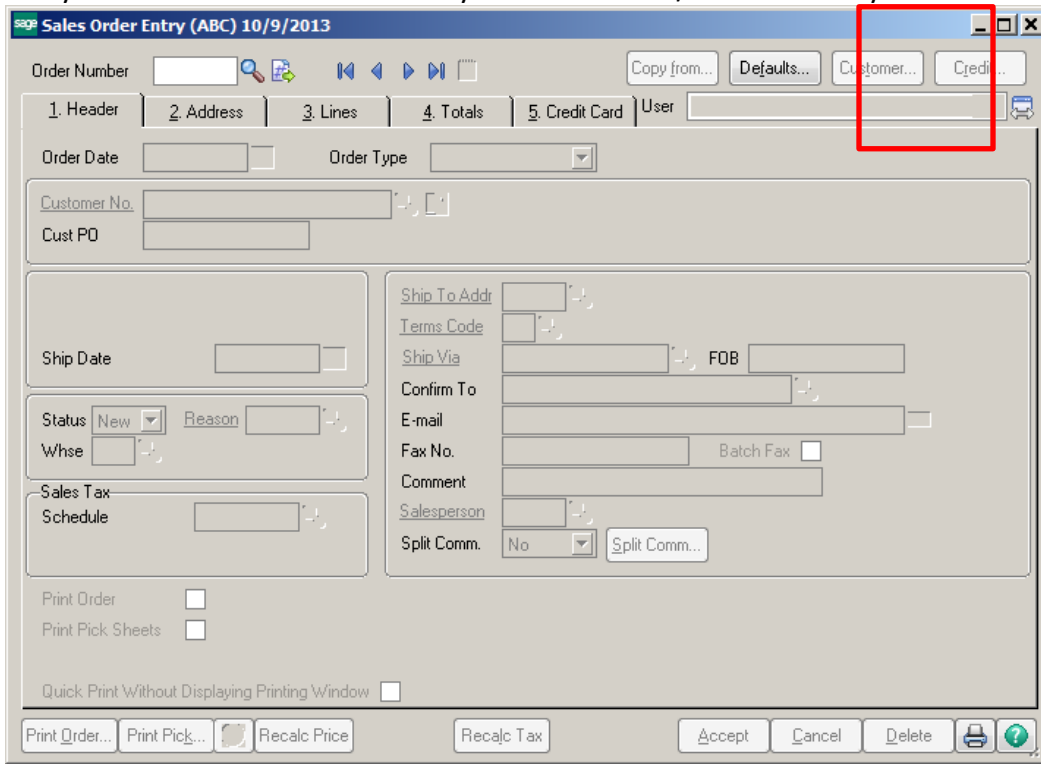
For example, if your user should always be selection a specific warehouse, Ship Via or FOB, you can set it here.

Once you click OK, the system will prompt you to Save the values for future sessions.

Sage 100 ERP

Do you want to save the values for Order Type, Warehouse, Print Order, Print Pick Sheet, Ship Via and FOB for use with future Order Entry sessions?

[Yes] [No]