




## How to Use the Custom Lookup Wizard

The magnifying glass is your lookup icon.

Customer No.    Copy From... Renumber... More... ▾


Name

1. Main | 2. Additional | 3. Statistics | 4. Summary | 5. History | 6. Invoices | 7. Transactions | 8. S/Os


Address  

ZIP Code

City  State


Country  


Residential Addr


Salesperson   Split Comm...


Telephone  Ext


Fax

Terms Code  

Primary Contact  

Ship Code  


Primary Ship To  


Tax Schedule  

Exemptions...



Credit Hold

Credit Limit  .00

E-mail Address  

URL Address  

Paperless...

Accept  Cancel  Delete  



Click the Custom Button

Customer List

| Customer No. ▲ | Name                      | Status   | Zip Code   | Phone Number   | Sort ▲ |
|----------------|---------------------------|----------|------------|----------------|--------|
| 01-ABF         | American Business Futures | Active   | 53205-1204 | (414) 555-4787 | AME    |
| 01-AVNET       | Avnet Processing Corp     | Active   | 53120      | (414) 555-2635 | AVN    |
| 01-BRESLIN     | Breslin Parts Supply      | Active   | 53266      | (414) 555-9654 | BRE    |
| 01-HILLSB      | Hillsboro Service Center  | Active   | 53151      | (414) 555-6599 | HILL   |
| 01-MAVRK       | Maverick Papers           | Inactive | 60601      | (312) 861-1200 |        |
| 01-RSSUPPL     | R & S Supply Corp.        | Active   | 53126      | (414) 555-5587 | R&S    |
| 01-SHEPARD     | Shepard Motorworks        | Active   | 53151      | (414) 555-6544 | SHE    |
| 02-ALLENAP     | Allen's Appliance Repair  | Active   | 92875      | (714) 555-3121 | ALLI   |
| 02-AMERCON     | American Concrete Service | Active   | 92625      | (714) 555-2134 | AME    |
| 02-ATOZ        | A To Z Carpet Supply      | Active   | 92661      | (714) 555-2231 | ATO    |
| 02-AUTOOCR     | Autocraft Accessories     | Active   | 92661-0002 | (714) 555-0101 | AUT    |
| 02-BAYPYRO     | Bay Pyrotronics Corp.     | Active   | 92257-0001 | (415) 555-9654 | BAY    |
| 02-CAPRI       | Capri Sailing Ships       | Active   | 92662      | (714) 555-4421 | CAP    |
| 02-CUSTOM      | Custom Craft Products     | Active   | 92554      | (714) 555-7848 | CUS    |
| 02-GREALAR     | Greater Alarm Company     | Active   | 92266      | (714) 555-5531 | GRE    |

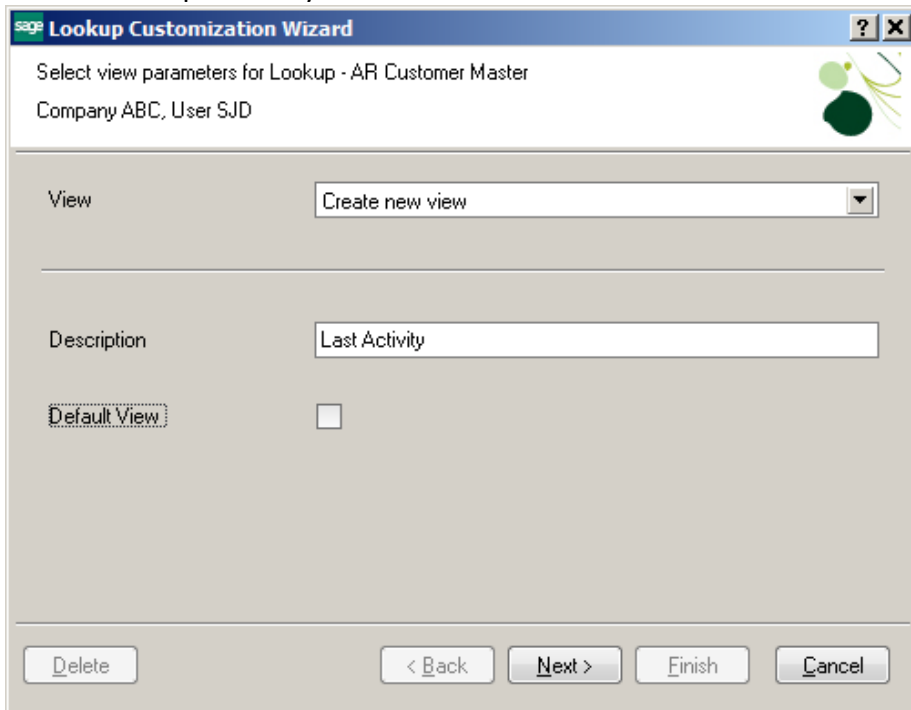
Search  Customer No  Begins with   Find

Filters... View  Standard

Custom...  Select  Cancel  

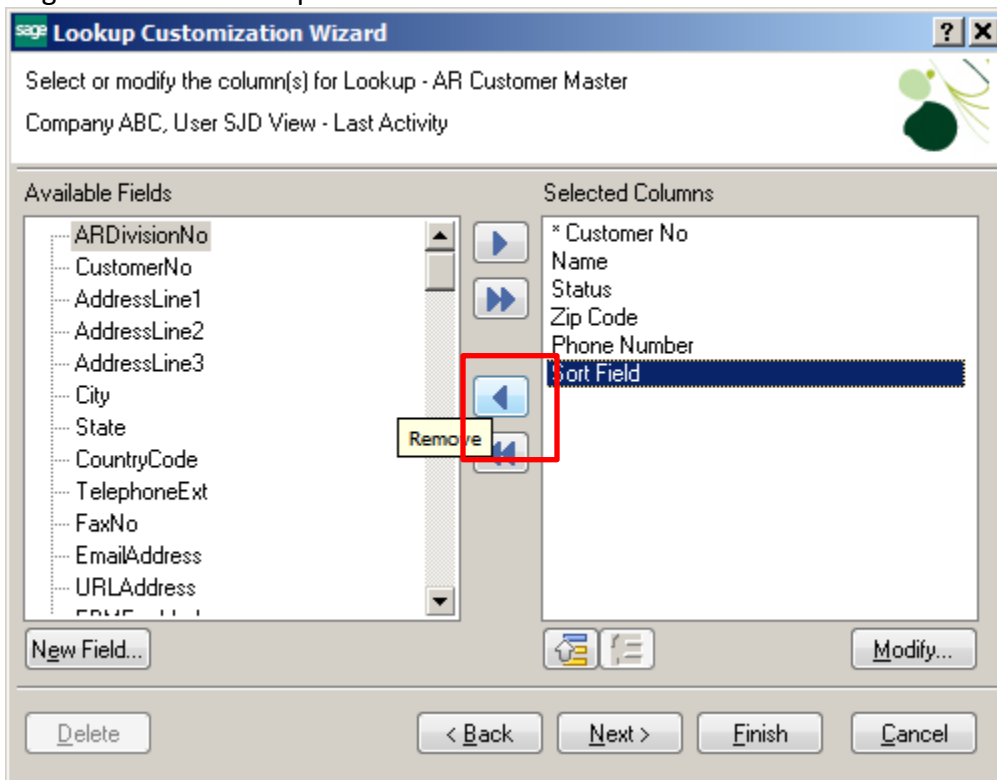
Found 17 records

Enter a description for your view. Click Next.

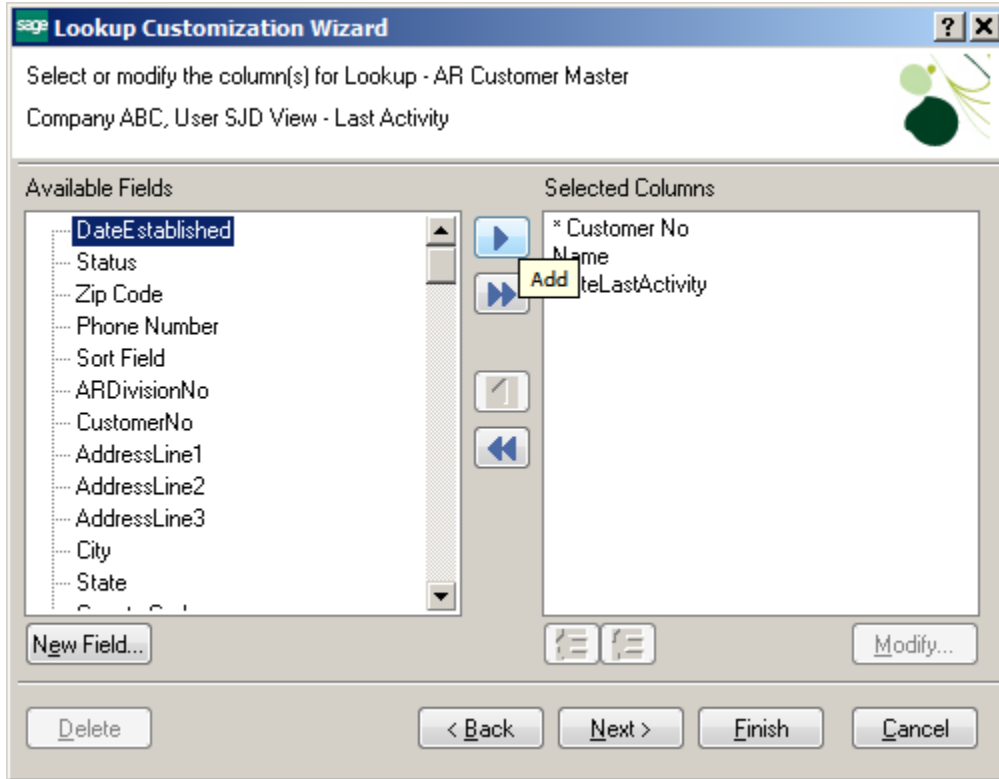


On the next screen there are two boxes. The box to the left is the available fields, the box to the right are the fields the lookup is currently using.

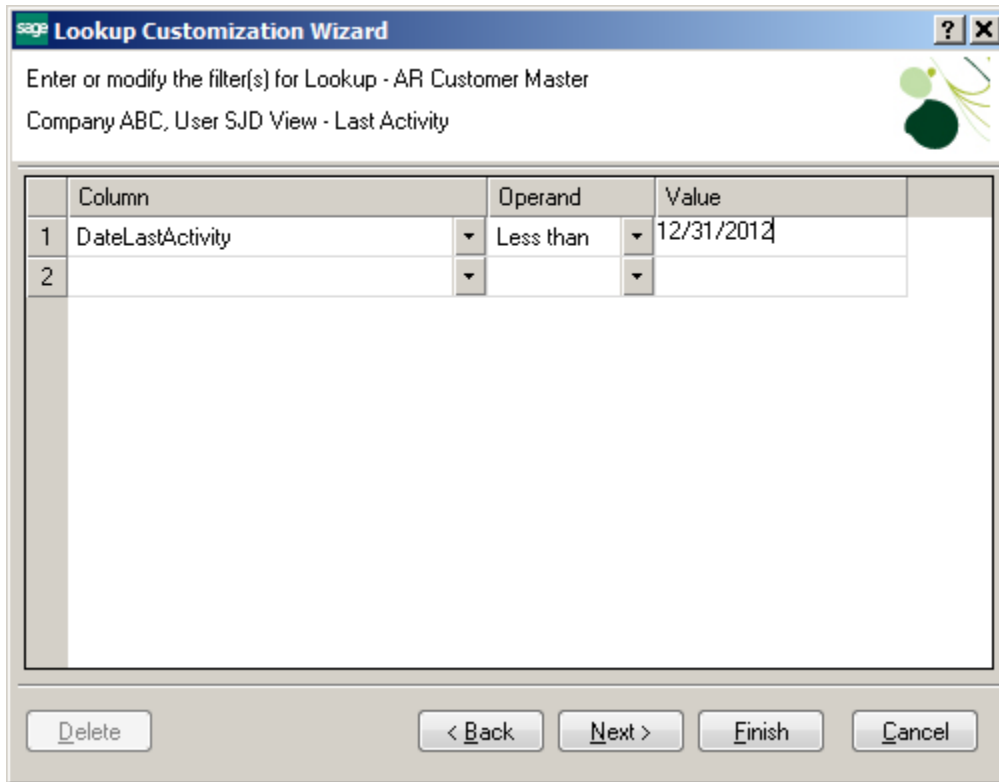
Remove any fields you don't want in the view by clicking on them, one at a time, then clicking the single blue arrow that points to the left.



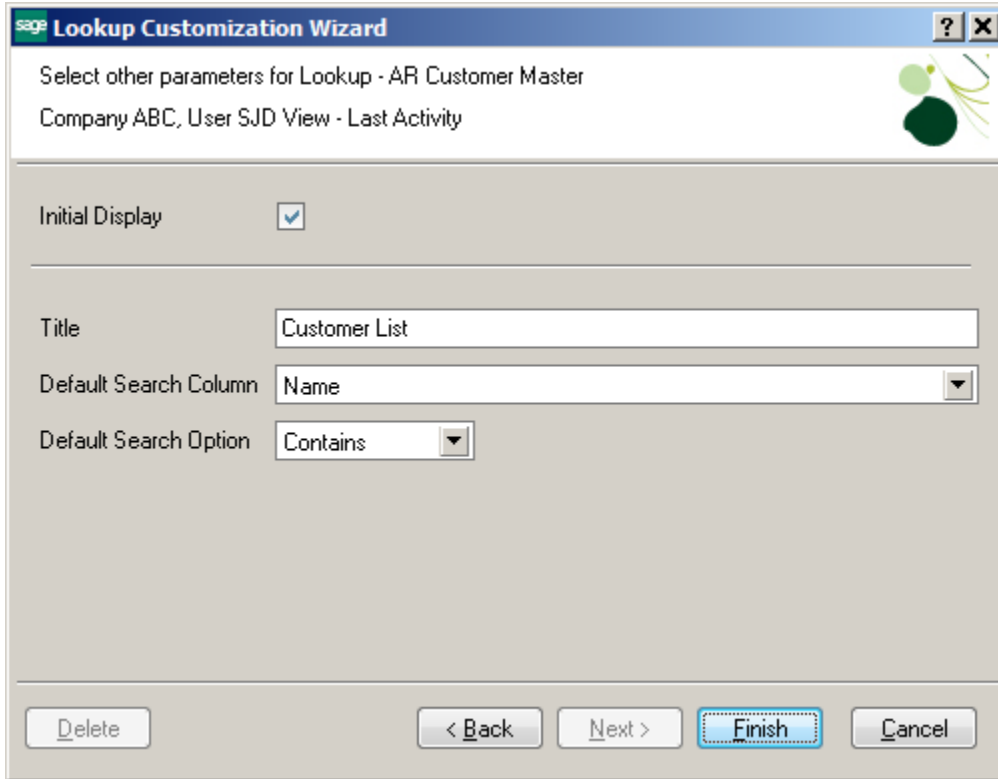
Select the fields from the box on the left that you would like to appear in your lookup. Click on the field and then click on the single blue arrow that points to the right. Click Next.



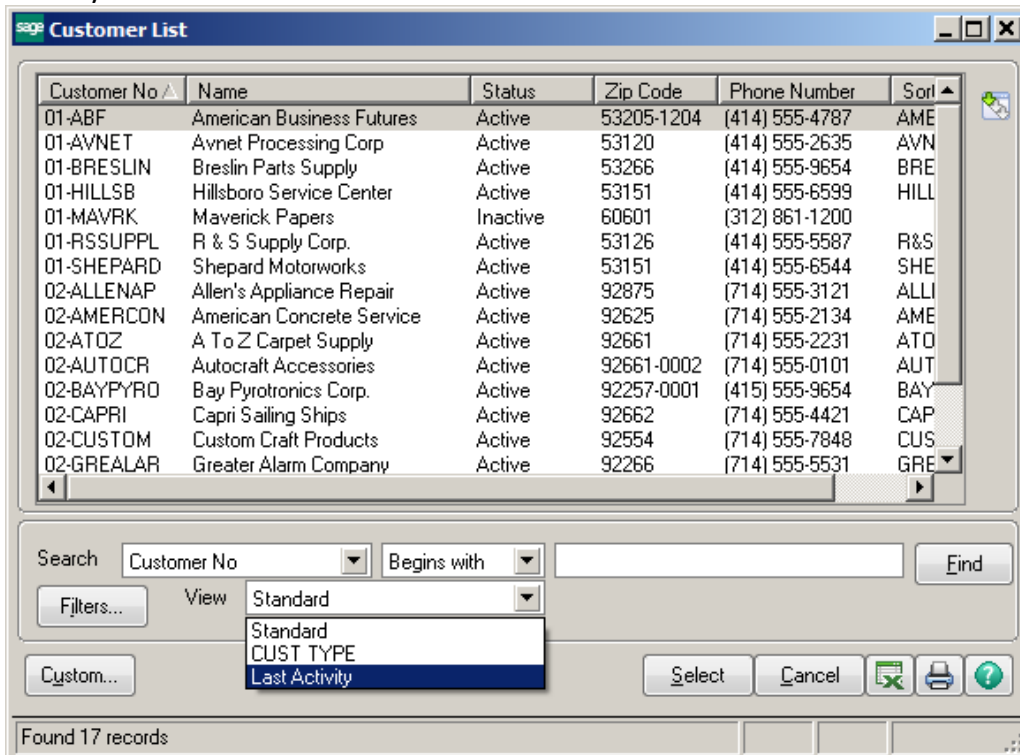
You can filter your data by selecting a column on the Filter screen and adding your condition. Then click Next.



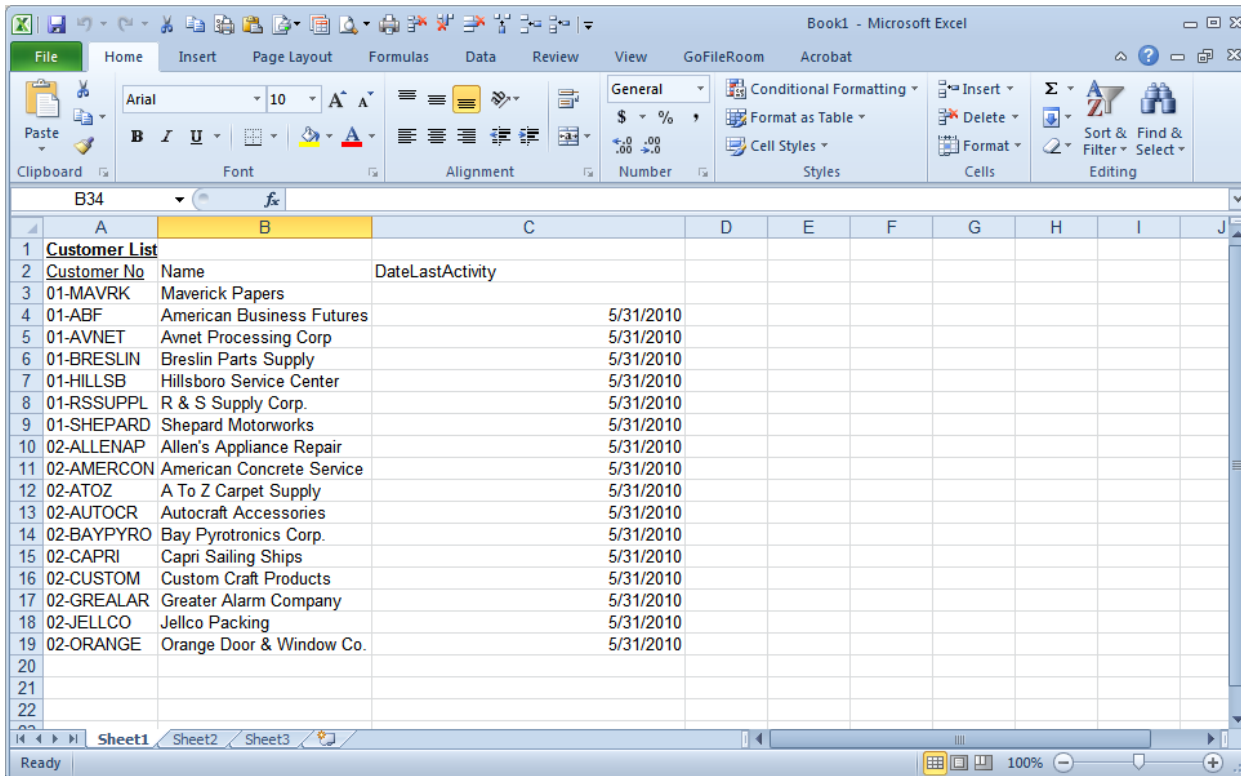
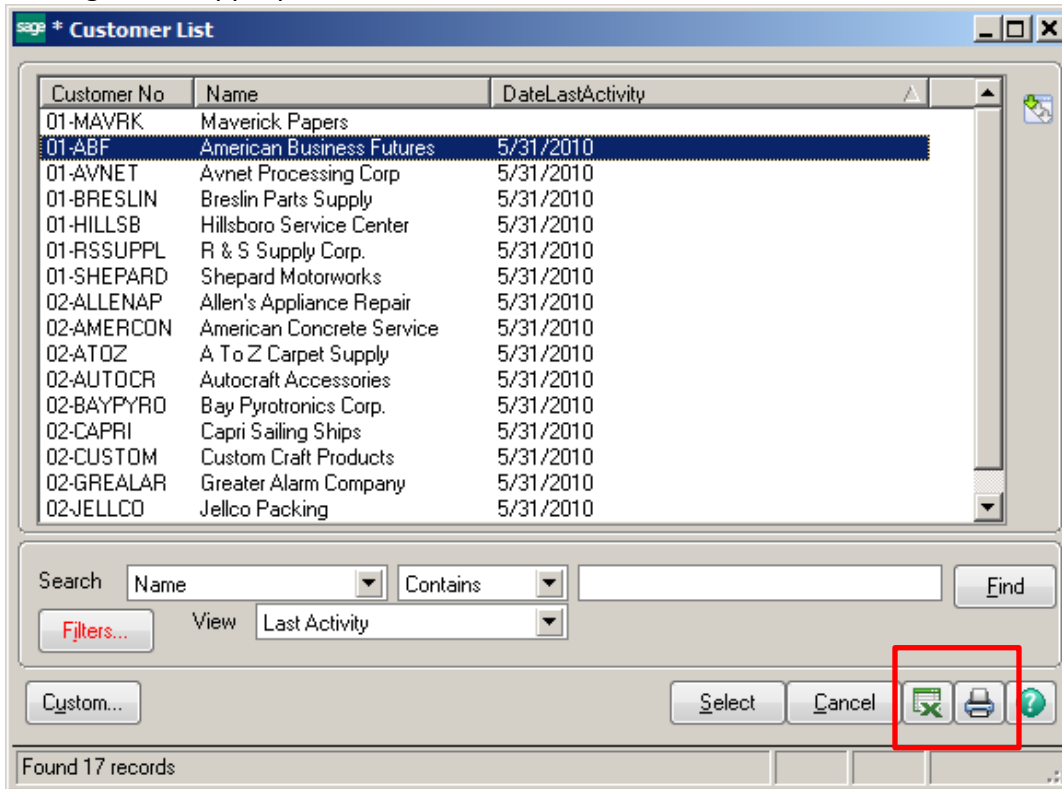
To change the Default Lookup field, click the down arrow and choose the column you would like to search by. You can also change the Default Search Option. Click Finish when done.



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

sage \* Order Number List

| Order No | Order Date | Type | PO Number | Customer No | Bill To Name            | BillToAddress1        | ShipToName             | ShipToAddress1        |
|----------|------------|------|-----------|-------------|-------------------------|-----------------------|------------------------|-----------------------|
| 0000103  | 5/31/2010  | R    |           | 02-ORANGE   | Orange Door & Wind...   | 1750 Edinger Avenue   | Orange Door & Win...   | 1750 Edinger Avenu    |
| 0000104  | 4/20/2010  | R    | VERBAL    | 02-ATOZ     | A To Z Carpet Supply    | 1805 Newport Blvd     | A To Z Carpet Supply   | 1805 Newport Blvd     |
| 0000105  | 4/20/2010  | M    | TS0420    | 01-AVNET    | Avnet Processing Corp   | 3361 W. Kenosha       | Avnet Processing C...  | 3361 W. Kenosha       |
| 0000111  | 5/1/2010   | B    | VERBAL    | 02-JELCO    | Jelco Packing           | 1889 E. Ball Road     | Jelco Packing          | 1889 E. Ball Road     |
| 0000112  | 5/3/2010   | S    | VERBAL    | 02-CUSTOM   | Custom Craft Products   | 1007 West 1st Street  | Custom Craft Produ...  | 1007 West 1st Stree   |
| 0000115  | 5/18/2010  | S    | VERBAL    | 01-ABF      | American Business F...  | 2131 E. 14th Street   | American Business ...  | Distribution Warehou  |
| 0000116  | 5/19/2010  | S    | 90-1004   | 01-BRESLIN  | Breslin Parts Supply    | 2035 N. Molalla Ave   | Breslin Parts Supply   | 2035 N. Molalla Ave   |
| 0000143  | 5/15/2010  | S    |           | 02-ALLENAP  | Allen's Appliance Re... | 18026 E. 10th         | Allen's Appliance R... | 18026 E. 10th         |
| 0000149  | 5/23/2010  | B    |           | 02-AMERCON  | American Concrete ...   | 11733 Cardinal Circle | American Concrete ...  | 11733 Cardinal Circle |
| 0000152  | 5/11/2010  | B    |           | 01-BRESLIN  | Breslin Parts Supply    | 2035 N. Molalla Ave   | Breslin Parts Supply   | 2035 N. Molalla Ave   |
| 0000153  | 5/11/2010  | B    | XX-890200 | 01-ABF      | American Business F...  | 2131 E. 14th Street   | American Business ...  | 2131 E. 14th Street   |
| 0000156  | 5/15/2010  | S    |           | 02-ATOZ     | A To Z Carpet Supply    | 1805 Newport Blvd     | A To Z Carpet Supply   | 1805 Newport Blvd     |
| 0000157  | 5/15/2010  | S    |           | 02-CUSTOM   | Custom Craft Products   | 1007 West 1st Street  | Custom Craft Produ...  | 1007 West 1st Stree   |
| 0000158  | 5/15/2010  | S    |           | 02-AUTOOCR  | Autocraft Accessories   | 310 Fernando Street   | Autocraft Accessories  | 310 Fernando Street   |
| 0000159  | 5/18/2010  | S    |           | 02-GREALAR  | Greater Alarm Comp...   | 18330 Ward Street     | Greater Alarm Comp...  | 18330 Ward Street     |

Search: PO Number Contains [ ] Find

Filters... View \*Orders

Custom... Select Cancel [ ] [ ] [ ]

Found 24 records

Click on Library Master\Main\User Lookup Wizard

sage User Lookup Wizard

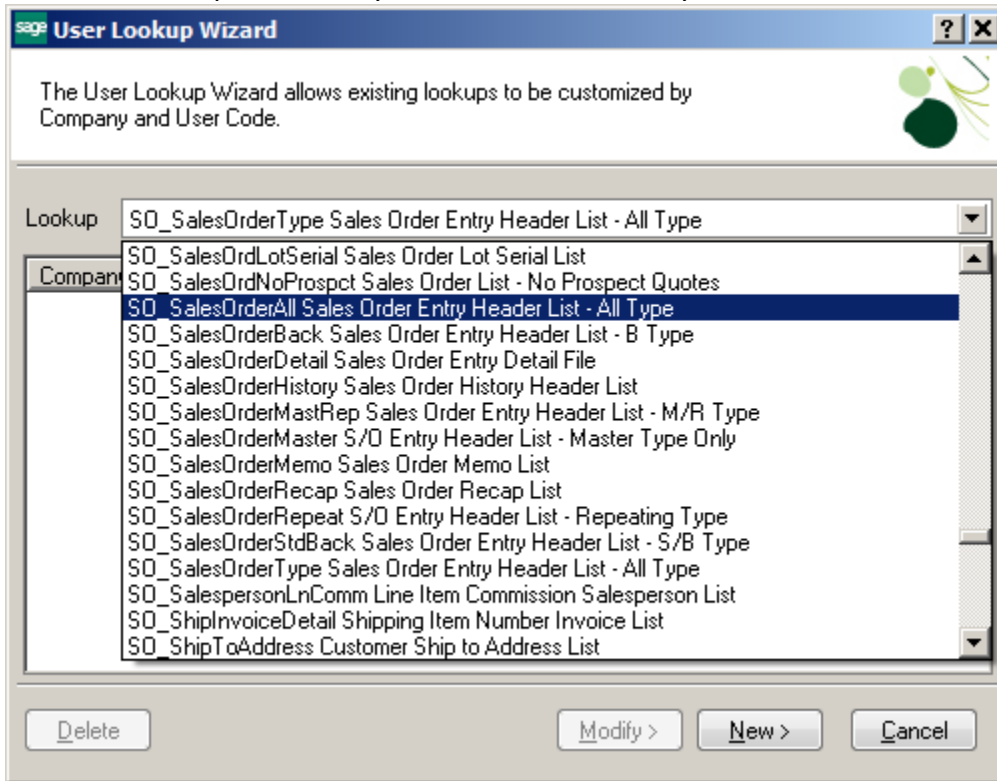
The User Lookup Wizard allows existing lookups to be customized by Company and User Code.

Lookup: [ ]

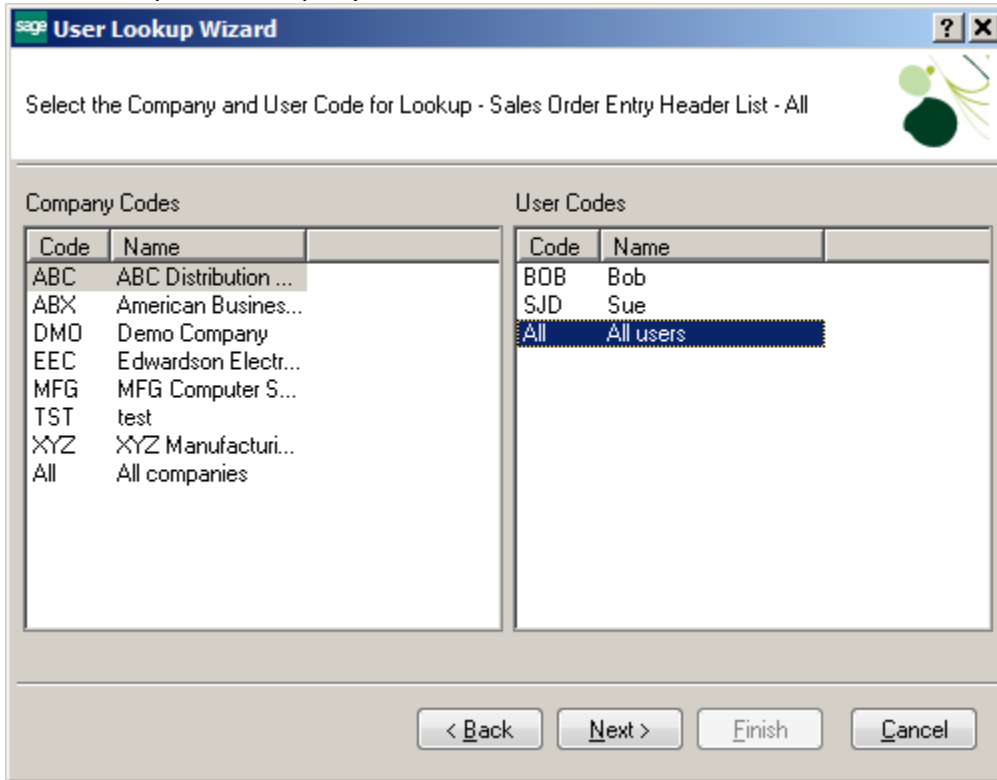
| Company Code | User Code |
|--------------|-----------|
|              |           |

Delete Modify > New > Cancel

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.

| Column | Operand | Value | Lock                     |
|--------|---------|-------|--------------------------|
| 1      |         |       | <input type="checkbox"/> |
| 2      |         |       | <input type="checkbox"/> |



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

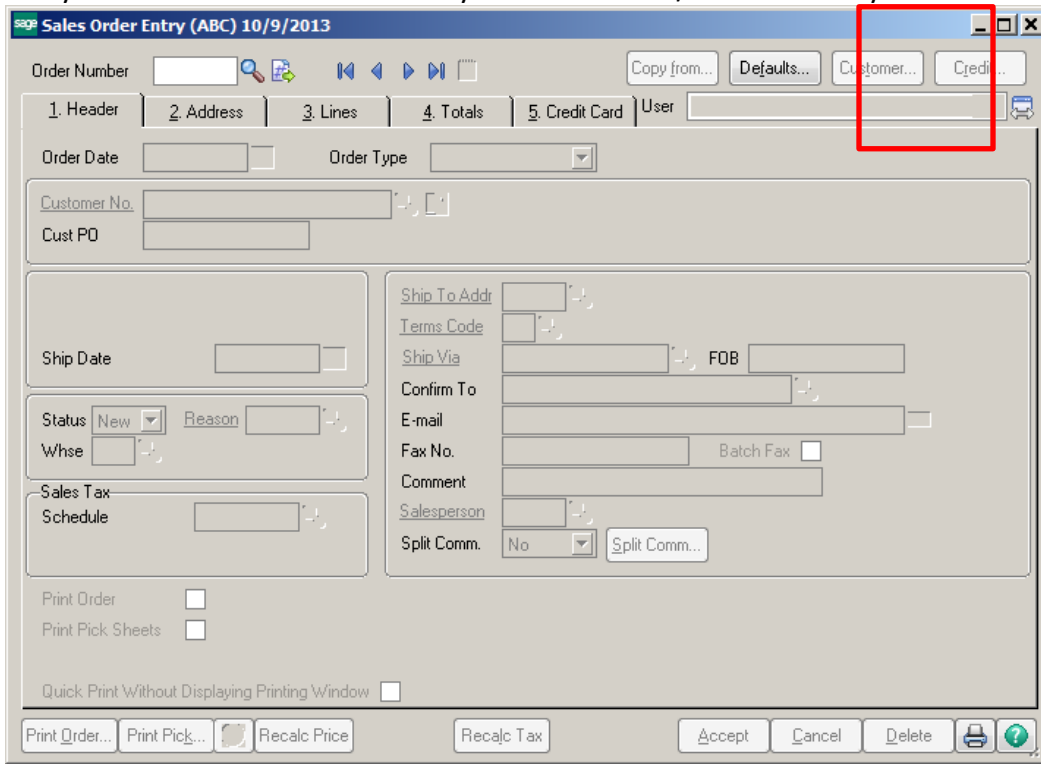
This will now be your default lookup for ALL users.

| Order No | Order Date | Type | Customer No | Bill To Name              | BillToAddress1  |
|----------|------------|------|-------------|---------------------------|-----------------|
| 000103   | 5/31/2010  | R    | 02-ORANGE   | Orange Door & Window Co.  | 1750 Edinger A  |
| 000104   | 4/20/2010  | R    | 02-ATOZ     | A To Z Carpet Supply      | 1805 Newport E  |
| 000105   | 4/20/2010  | M    | 01-AVNET    | Avnet Processing Corp     | 3361 W. Kenos   |
| 000111   | 5/1/2010   | B    | 02-JELLCO   | Jellco Packing            | 1889 E. Ball R  |
| 000112   | 5/3/2010   | S    | 02-CUSTOM   | Custom Craft Products     | 1007 West 1st   |
| 000115   | 5/18/2010  | S    | 01-ABF      | American Business Futures | 2131 E. 14th St |
| 000116   | 5/19/2010  | S    | 01-BRESLIN  | Breslin Parts Supply      | 2035 N. Molalle |
| 000143   | 5/15/2010  | S    | 02-ALLENAP  | Allen's Appliance Repair  | 18026 E. 10th   |
| 000149   | 5/23/2010  | B    | 02-AMERCON  | American Concrete Service | 11733 Cardinal  |
| 000152   | 5/11/2010  | B    | 01-BRESLIN  | Breslin Parts Supply      | 2035 N. Molalle |
| 000153   | 5/11/2010  | B    | 01-ABF      | American Business Futures | 2131 E. 14th St |
| 000156   | 5/15/2010  | S    | 02-ATOZ     | A To Z Carpet Supply      | 1805 Newport E  |
| 000157   | 5/15/2010  | S    | 02-CUSTOM   | Custom Craft Products     | 1007 West 1st   |
| 000158   | 5/15/2010  | S    | 02-AUTOOCR  | Autocraft Accessories     | 310 Fernando S  |
| 000159   | 5/18/2010  | S    | 02-GREALAR  | Greater Alarm Company     | 18330 Ward St   |

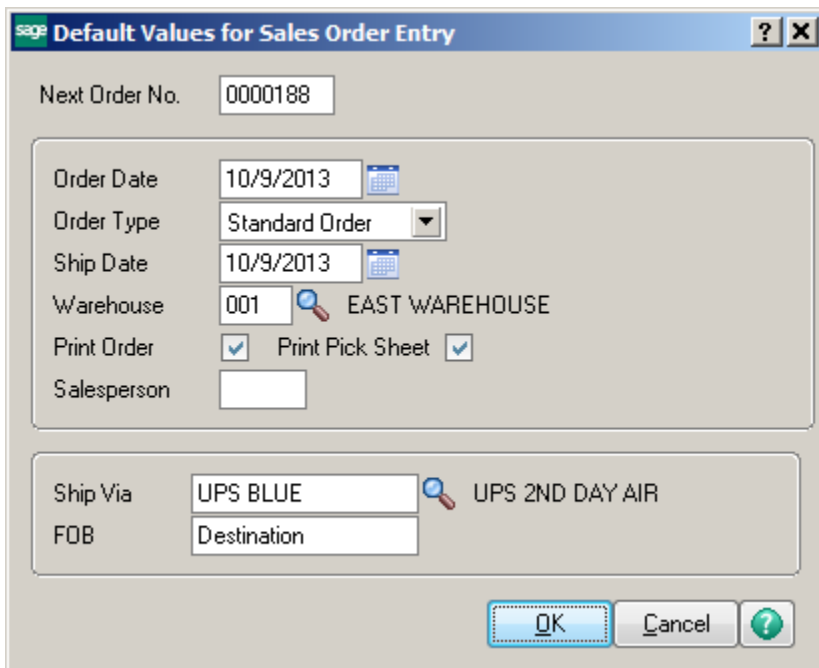


# Bonus Round!

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.

