



ERP + INTEGRATIONS

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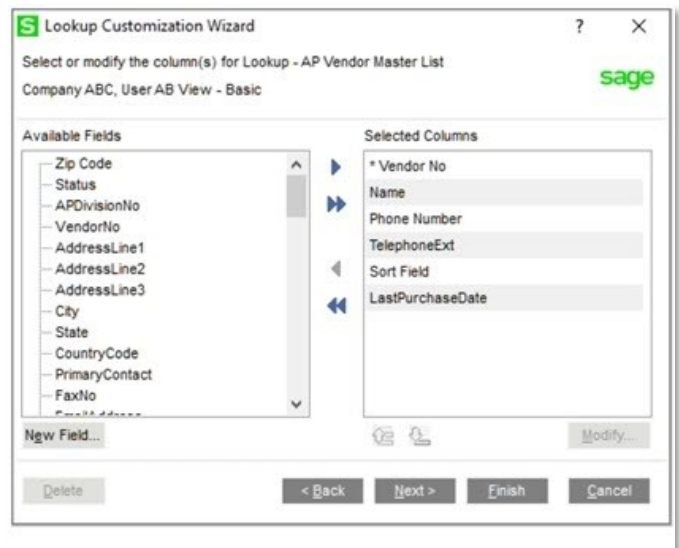
## HOW TO CREATE A CUSTOM LOOKUP VIEW IN SAGE 100

Lookups are an important function in Sage 100. After all, what good is having all that data in your accounting system if you can't easily pull it up? However, the default lookups don't always display exactly what you need so let's take a look at how to customize your lookup views in Sage 100.

### Custom Lookup Views

Anytime you click the magnifying glass icon, it launches into a lookup screen. Whether you're searching for vendors, customers, accounts, or any other data in Sage 100, lookups are a quick and easy way to find what you need.

But in some cases, hundreds or even thousands of records might display by default, forcing you to spend additional time searching and scrolling. With the following instructions, you can customize the fields, filters, and search criteria to really speed things up:



1. From any lookup window (after clicking the magnifying glass icon), choose the **Custom** button which launches the **Lookup Customization Wizard**.
2. In the **View** field of the Customization Wizard, select **Create New View** and give it a name in the description field (or you can select an existing view to modify it).
3. Click the **Default View** checkbox if you'd like this to be the new default lookup. Click **Next**.
4. On the next screen, you can **add, remove, modify, and rearrange the order of the columns** that display in the lookup. Note that the first column indicated by an asterisk (\*) cannot be removed, but can be modified.
5. At this point, you can either click **Finish** if you're happy with your new customized view or click **Next** to launch a third options screen to define additional settings to modifying the Filters and further refine the data that will display in your lookup.
6. In the last Customization Wizard screen, you can make any final changes and then click **Finish** to create your new customized lookup view.

Now when you launch your new lookup screen, you'll notice that the title bar at the top left shows your new description along with an asterisk to indicate that this is a custom view.

**Bonus Tip:** Did you know you can export the data in your new custom lookup to Microsoft Excel? Just click the Excel icon in the lower right corner of your lookup window and voila! The data is exported so you can further slice, dice and analyze.

## Collection of Sage 100 Customer Resources Online

Did you know that Sage offers a collection of helpful customer resources that can help you supercharge Sage 100 and maximize your investment in technology?

The [Sage 100 Customer Resources](#) website features live webcasts that teach you about new features and latest releases. You'll also find a wealth of information, product brochures, and self-running demos that help you learn about add-on solutions - like document management, A/P automation, time tracking, and more - that connect to Sage 100 and extend core functionality. You'll also find industry articles that teach you about cybersecurity, the cloud, and other key technology.

Plus, it serves as a handy portal to Sage 100 resources you probably use often such as Sage support, version release notes, community forums, training courses, and more.



[Visit the Sage 100 Customer Resources Portal](#)

## Sage Fixed Assets 2024.1 Now Available

Sage Fixed Assets 2024.1 is packed with key tax updates and smart new features to simplify asset management including:

- U.S. tax and depreciation calculation updates
- A new AI chatbot that delivers quick answers
- Save keystrokes with expanded default entries

Check out the [Sage Fixed Assets 2024.1 release notes](#) for full details on all enhancements and product fixes.



## Sage Member Masterclass Season 4 is Here

Some may recall that back in 2022, Sage launched season 1 of their “Member Masterclass” series featuring talks, articles, and advice from the world’s leading experts on the challenges and opportunities in world of business today.

Based on the success of these insightful sessions, Sage has recently announced availability of season 4. In this season, speakers delve into what it takes to survive and thrive in the face of constant, and sometimes, unpredictable change.

Discussion topics include:

- How to navigate business growth
- How to build a leadership team
- How to lead people through organizational change
- Archive links to Seasons 1 - 3



Check out [Member Masterclass Season 4](#)

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