"How To Guide": Sort & Search Tables in Sage Intacct

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There are occasions where you might find yourself searching through very large tables in Sage Intacct. It might be an AP Bill with a lot of lines or a payroll journal entry that has a lot of detail. Whatever the case may be, Sage Intacct displays the table in the order in which it was entered or imported, which may not be the order you want to see it in at the time. It's also possible that you're searching for a specific value and don't want to sift through a huge entry to find it. What we are going to explore here is a method of sorting by any column heading and search for any value in the table.

First, some things to be aware of:

- This will rely on loading a third-party, open-source javascript library called Datatables.
- You will need to change the transaction tables setting in your user preferences to "All" (see below), otherwise, you will only be able to sort the first page of rows.

1. For our demonstration, we are going to set the script up on the journal entry view screen. Although not tested, it should work on any other screen with tables that you want to sort and allow page edits. The first step is to find and view a journal entry. Here is what the vanilla interface looks like:

2. In the upper-right of the page, click on the "More action" drop-down. From there, navigate to "Edit this page" to add the script we need.

3. On the edit page screen, click and drag "New < Script Component >" from the left and drop it onto the "View GL Batch" section. It should look like this:

4. On the right-hand side of the newly added script component, click on "Edit" to open the script editor.

5. Paste the following script into the script editor:

6. Click on "Save" in the script editor and then again on the page editor. You will be directed back to the journal entry screen.

7. Note the addition of a search box and the sorting icons on each column header:

Historical Journal - Journal Entries

Edit   Re

Search: [   ]

Entries

	Account	Transaction debit	Transaction credit	Department	Location	Project	Employee
1	1100--Accounts Receivable - trade	533,073.05	--	500--Sales	200--San Francisco	--	--
2	1400--Inventory	--	11,940.57	500--Sales	200--San Francisco	--	--
3	2620--Deferred Revenue - Maintenance	--	22,352.56	500--Sales	200--San Francisco	--	--
4	4030--Revenue - On Premise Services	--	111,762.79	300--Services	200--San Francisco	--	--
5	2650--Deferred Revenue - On Demand Subscriptions	--	143,177.60	500--Sales	200--San Francisco	--	--
6	2660--Deferred Revenue - On Demand Support	--	35,794.40	500--Sales	200--San Francisco	--	--
7	4070--Revenue - On Demand Services	--	95,929.00	300--Services	200--San Francisco	--	--
8	4010--Revenue - On Premise License	--	111,762.79	500--Sales	200--San Francisco	--	--
9	4040--Revenue - Hardware	--	12,293.90	500--Sales	200--San Francisco	--	--

8. Now you can sort by a specific column like credit amount:

Historical Journal - Journal Entries

Edit   Re

Search: [   ]

Entries

	Account	Transaction debit	Transaction credit	Department	Location	Project	Employee
10	5000--Cost of Goods Sold	11,940.57	--	500--Sales	200--San Francisco	--	--
17	2660--Deferred Revenue - On Demand Support	31,301.37	--	500--Sales	200--San Francisco	--	--
15	2620--Deferred Revenue - Maintenance	346,863.50	--	500--Sales	200--San Francisco	--	--
16	2650--Deferred Revenue - On Demand Subscriptions	367,173.61	--	500--Sales	200--San Francisco	--	--
1	1100--Accounts Receivable - trade	533,073.05	--	500--Sales	200--San Francisco	--	--
11	1100--Accounts Receivable - trade	682,798.80	--	500--Sales	200--San Francisco	--	--
2	1400--Inventory	--	11,940.57	500--Sales	200--San Francisco	--	--
9	4040--Revenue - Hardware	--	12,293.90	500--Sales	200--San Francisco	--	--

9. Or we can filter by a value:

Historical Journal - Journal Entries

Search: 11,940.57

Entries

	Account	Transaction debit	Transaction credit	Department	Location	Project	Employee
10	5000--Cost of Goods Sold	11,940.57	--	500--Sales	200--San Francisco	--	--
2	1400--Inventory	--	11,940.57	500--Sales	200--San Francisco	--	--
	Total	1,973,150.90	1,973,150.90				

Showing 1 to 2 of 2 entries (filtered from 23 total entries)

That's all there is to it! The same script should work on any page with a data table, although you may need to change the "#table__obj__ENTRIES" portion of the script depending on the page.

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