

"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.

Personalize page defaults

Depending on your connection, increasing page defaults can affect system speed in loading or refreshing pages.

List screens: records per page

The number of lines to display in screens that provide lists of records

Selection list pop-ups: items per page

The number of lines to display in pop-up selection screens in the event that there are more items than the drop-down list displays

Drop-down lists: items per drop-down 

The number of choices to display in drop-down menu lists

Transaction rows: per transaction

In multi-line edit screens, the number of rows displayed when adding a new transaction, for example adding a new expense report. If you set the default to 2 rows, the system displays two empty rows in the add Expense Report screen.

Fast entry row: for splitting transactions

Controls the number of blank lines used for splitting the transaction across two or more account-department-location combinations (applies to fast-entry bills, checks, and invoices screens)

Transaction tables: rows per page

The number of transaction rows you can view before you page to view the next set 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:

Historical Journal - Journal Entries

[Edit](#)
[Rev](#)

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 | -- | -- |
| 10 | 5000--Cost of Goods Sold | 11,940.57 | -- | 500--Sales | 200--San Francisco | -- | -- |
| 11 | 1100--Accounts Receivable - trade | 682,798.80 | -- | 500--Sales | 200--San Francisco | -- | -- |
| 12 | 2620--Deferred Revenue - Maintenance | -- | 328,741.17 | 500--Sales | 200--San Francisco | -- | -- |
| 13 | 2650--Deferred Revenue - On Demand Subscriptions | -- | 327,917.28 | 500--Sales | 200--San Francisco | -- | -- |

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:

Properties

Section Title

Tab

Columns

Style

Collapsible

Default New Fields Section

Create

Page Editor: View GL Batch

View GL Batch

+ Add Tab

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

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 | -- | -- |
| 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.

Look for more Sage Intacct "How to Guides" from our staff in our weekly blog posts!