

Your Guide to Using Lists in Sage Intacct



ARTICLE 04.24.18 DEAN DORTON

Written by Barbara Raess, Sage Intacct Consultant at Massey Consulting

Lists inside of Sage Intacct provide a means of viewing aspects like records, transactions, or other information in list format. For example, you can have a list of customers or a list of bills. Most list pages display a default set of columns that are sorted alphanumerically, like displaying customers in order based on Customer ID.

Sage Intacct provides tools for you to sort, filter, and even create views that display only those list items of importance to you.

Here are a few best practices on using lists inside of Sage Intacct

A. Sort and filter a list to quickly find what you're looking for.

- In the text field above the column that contains the value, enter a value. For example, if the value begins with "San" type **San** to include records with a value for this column of San Jose, San Francisco, Santa Fe, and so on.
- Click **Go** beside the field. The system displays only those list items that match the text you entered.

Example of Customer list with City names beginning with "San":

Customers

[Add](#)[Delete](#)[Done](#)

All ▾ Manage views ▾ Group filters None ▾

☐ Include one-time ☐ Include inactive ☒ Display hierarchy ☐ Include private [Advanced filters](#) [Clear all filters](#)

Customer ID ▾		Customer name	City	State/province	Zip code	Custom
			San			
Edit	View	10011	Cymer	San Diego	CA	92127
Edit	View	10053	sForce	San Francisco	CA	94087
Edit	View	10055	salesforce.com	San Francisco	CA	94105
Edit	View	10060	Cytel Technology	San Diego	CA	92027

B. Use Advanced filters to enable you to apply standard operators to columns

- Click on the Advanced filters
- Add the Column to be used filtered from the dropdown list
- Add the operator for your filter from the dropdown list
- Add the criteria for your list
- Click Apply (see below)

[Advanced filters](#) [Clear all filters](#) (1 - 7 of 7)

Zip code ▾

contains ▾

--none-- ▾

starts with ▾

[Add filter](#) [Delete last filter](#)

Apply

Cancel

Example Customers list filtered by zip codes containing "100":

Customers

Add

De

All ▾

Manage views ▾

Group filters None ▾

☐ Include one-time

☐ Include inactive

☒ Display hierarchy

☐ Include private

[Advanced filters](#)

(

Customer ID ▾			Customer name	City	State/province	Zip code
Edit	View	 10001	Been Verified	New York	NY	10016
Edit	View	 10002	Sailthru	New York	NY	10013
Edit	View	 10003	YellowHammer	New York	NY	10001
Edit	View	 10004	Conductor	New York	NY	10016
Edit	View	 10007	LiveIntent	New York	NY	10007
Edit	View	 10008	Quantum Networks	New York	NY	10002
Edit	View	 10059	Quanum	New York	NY	10002

C. Add a custom view

If standard views are insufficient for displaying the list items and values that you need to see, you can create a custom view. A custom view can be based on a standard view or another custom view, or you can create a completely new custom view.

1. To add a new custom view:
- Under **Manage views**, click **Create New View**.
 - The Create New View wizard appears.
 - Follow the wizard steps
 - Save

Wizard Step	Description
Select columns	Select columns to be included or excluded in the view.
Select column sequence	• Click and drag a row up or down to move the column to a new position in the view. • Click the column name and type a new name to change the title of the column.

Set filter values as follows:

- Click a **Columns** field, and then click a column to filter by. The column does not have to be one of the columns displayed in your view.
- Click an **Operator** field, and then click an operator. Standard operators apply, such as Less than, Greater than, Equals, and more.

Select filters

- In **Value**, type the text or number you want to filter by.

If the column being filtered is a checkbox field, set the operator to Equals and the value to True or False.

To add more filter fields to the menu, click **Add Filter**.

To remove the most recently added filter, click **Delete Last Filter**.

- Click and drag a row up or down to set the order in which the system sorts the view results:
- Set included columns to ascending or descending order. The item at the top will be sorted by first, then the second item, and so on. Only items set to ascending or descending will be included in the sort.

Sort results

- In **Name**, type the name of this view as you want it to be listed in the **View** menu.

After a view is named, you can't rename it.

Describe your view

- Custom views automatically appear in your list screen under the **View** menu. To make this view appear on the application menu as well, select **Deploy**.
- To describe when and how this view is to be used, in **Description**, type a brief note.

2. To edit a Custom View

- Click the down arrow next to **ALL**
- Select the custom view you would like to change
- Under **Manage views**, click **Edit**.
- The Edit View wizard appears.
- Make changes as needed
- Save

To learn more Sage Intacct best practices, stay up to date on our calendar page, featuring monthly [CloudBytes webinars](#) on useful tips and tricks for Sage Intacct users.