Using Lists

Available in all versions of Sage 50 Accounting US

Quick Reference Guide

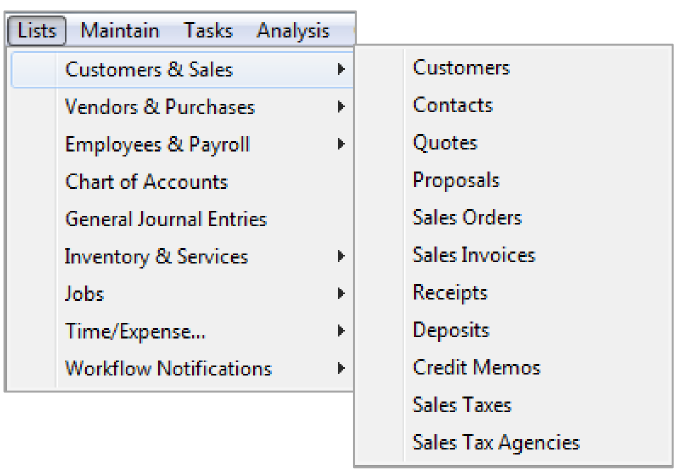
What are Lists?

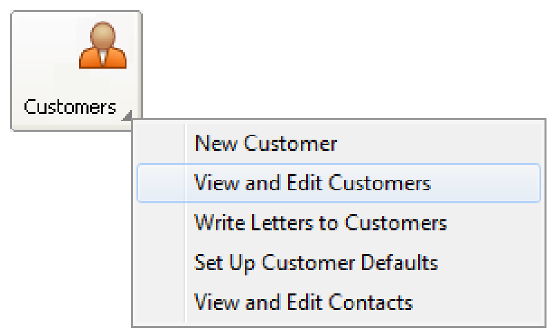
Lists display your company information in a format similar to a spreadsheet. You can use Lists to get a quick glance at different types of information. Below is an example of a Payments List. You can open a record or transaction by double clicking it.

Customer/Vendor ID	Check No.	Memo	Date	Amount
CLINE	10213	BEL003	3/15/2013	$100.00
PAYNE	10212	BMSA-5Z-78	3/15/2013	$50.00
SAFESTATE	10210	S3442-0641	3/15/2013	$530.64
ABNEY		BEL005	3/15/2013	$50.00
JACKSON	10209	409-110-00012	3/14/2013	$500.00
SOGARDEN	10208	GA-901010	3/14/2013	$250.54
MILLS	10207	208-11-2399	3/14/2013	$550.00
JUAN	10206	90-1005-01	3/14/2013	$274.56
GWINLICENSE	10205	9953-55221	3/14/2013	$147.00
PARIS	10211	BEL002	3/13/2013	$450.00
AKERSON		99-6-8-91	3/13/2013	$1,000.00

How do I view my Lists?

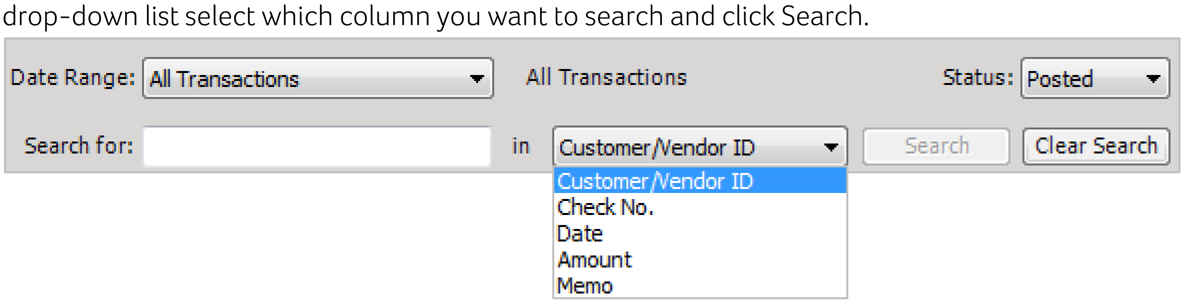
Go to the Lists menu or from the navigation areas you can select to 'View and Edit' records or transactions.



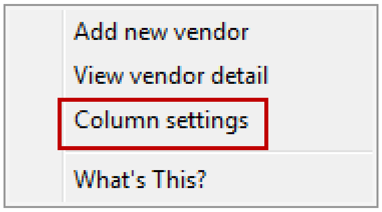


How do I filter and customize Lists?

Each list has different filter options. You can filter lists for a certain date range. If you want to search list information, in the Search for field, enter what you want to find (partial or whole words). Then in the drop-down list select which column you want to search and click Search.

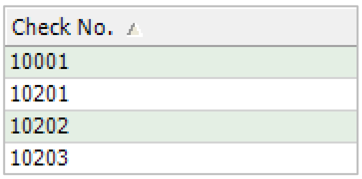


You can change which columns you see on the lists. Select the Settings button or right click on the list and select Column Settings

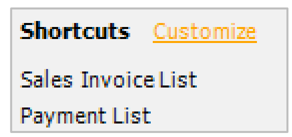


Sort columns

Click a column header to sort that column in ascending or descending order.



Did you know?



- You can set up shortcuts for the lists you use most. Click Customize in the Shortcuts area on the main Sage 50 screen.
- You can add new records or transactions from the lists by clicking New.
- You can quickly rearrange columns by dragging each column separately.
- Certain transactions can be copied from the list. Select a transaction and click Copy.