

## Tips & Tricks

Written by the firm's resident super user, Victoria, Accredo's user tips provide helpful information, short-cuts and general pointers to help customers improve their use of Accredo.

### Adding Custom Fields to Word Lookups

Table Designer users will be familiar with adding custom fields to Accredo.

Custom fields added to Accredo tables are available to customise into grids and report layouts and appear on a Custom tab on Maintenance Forms and Documents, but did you know that Custom fields can also be added to Word Lookups?

In the below example used, I have added another Category to my ARCUST table by using the example provided in the Help Topic:

**Table Designer > Extend Accredo Tables > Add a Category to Customer – example.**

I have assigned a category3 code of MED to customer DALTON as shown. →

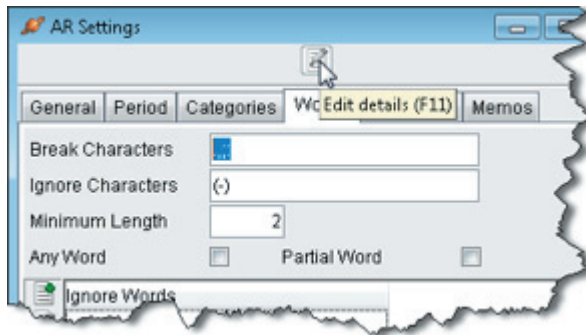
The screenshot shows a software window titled "AR Customer Maintenance - DALTON - Dalton Furniture Wholesalers". At the top, there is a "Select Customer" dropdown menu with "DALTON" selected. To the right of the dropdown are several icons and a button labeled "Dalton Furniture Wholesalers NZD". Below this is a tabbed interface with tabs for "Customer", "Contacts", "Banking/Delivery", "Custom", "Links", "Memos", "Balances", "Graph", and "Transactions". The "Custom" tab is currently selected, displaying a list with one entry: "Category 3" followed by "MED", which is highlighted in blue. At the bottom of the window, there is a "Bill From Customers" button, "Save" and "Cancel" buttons, and a status bar that reads "Created by ACCREDO on 25/01/2011 9:18:18 a.m. Modified by ACCREDO on 18/08/2011 1:56:54 p.m."

### To add your Custom Field to Word Lookup

Note that adding fields to word indexes does require a rebuild which can take some time, so for this reason we would recommend you perform this function on the server.

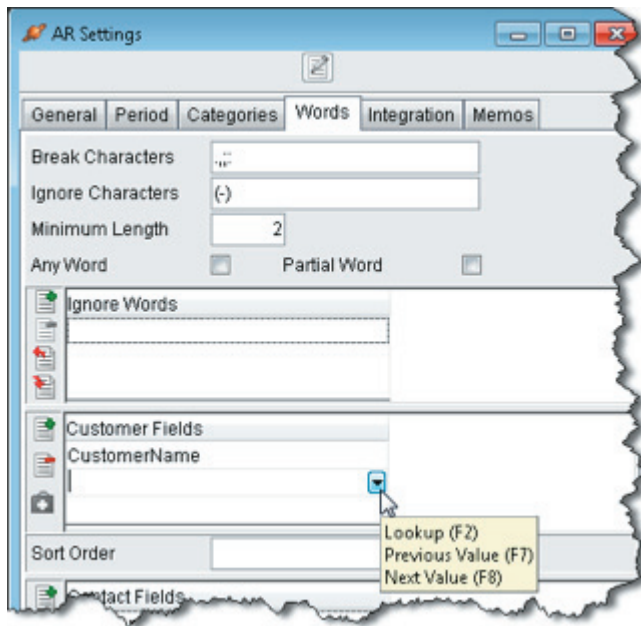
#### Setup > Accounts Receivable > Settings > Words

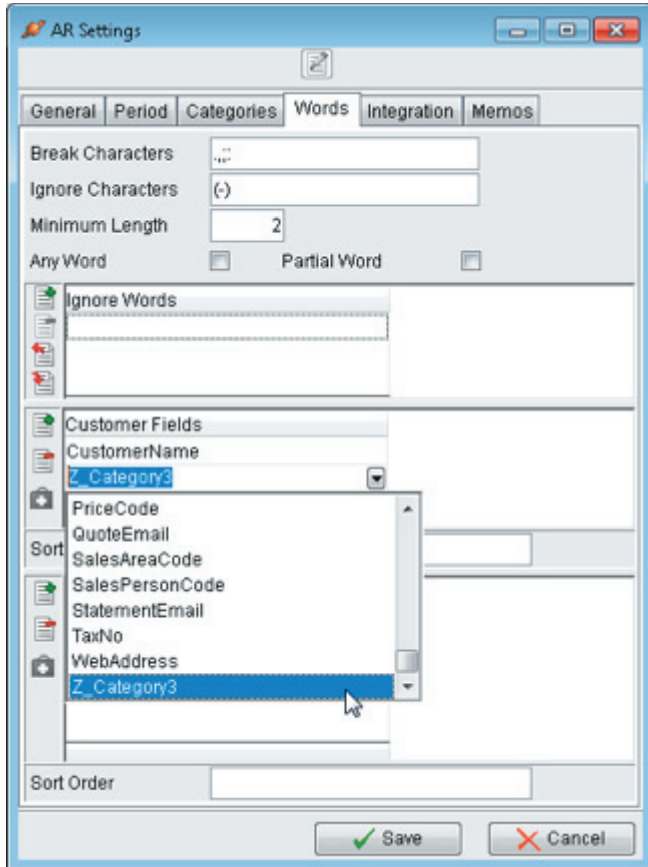
Click the Edit Button (or press F11) for Edit Mode



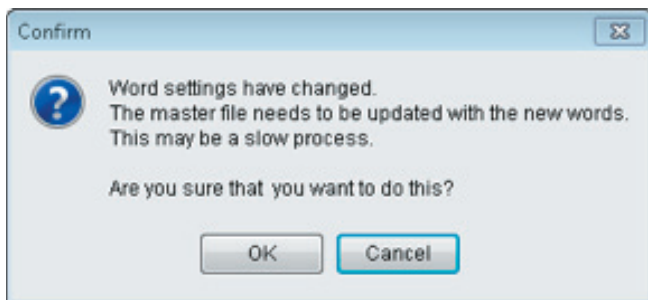
In the Customer Fields grid, click underneath CustomerName

Click the dropdown arrow, and scroll to the end of the list (or press End on your keyboard) and select your Custom field. Custom fields will always appear at the end of the list and are prefixed by a Z as shown below. →





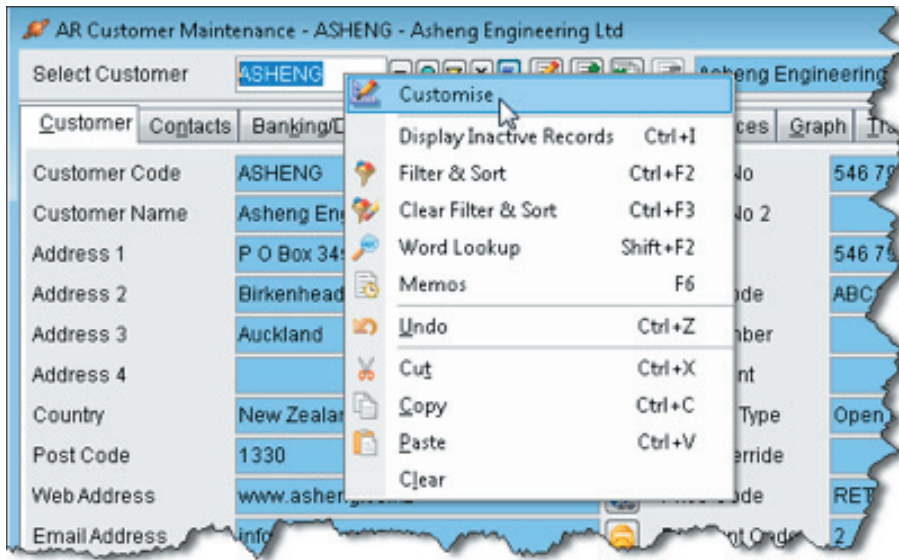
Press Save. A message will display as below. Press OK to continue and start the indexing. →



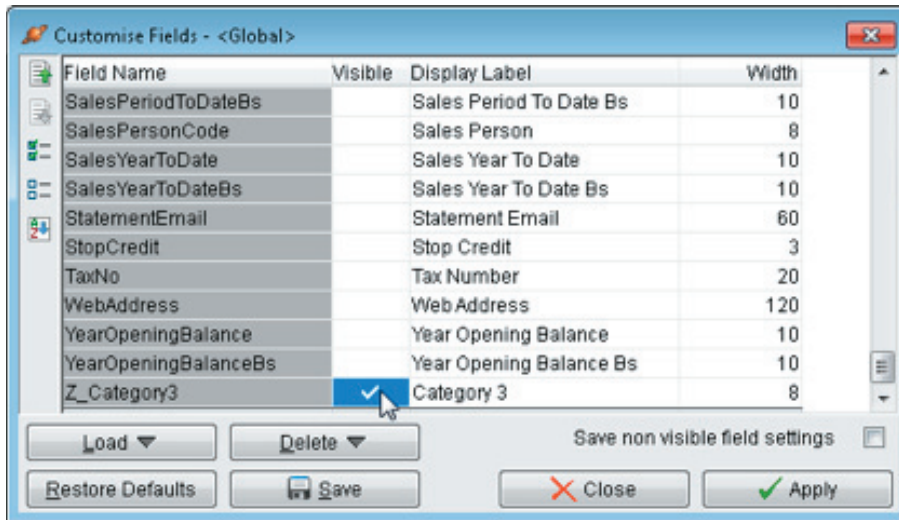
Now you will be able to use Word Lookup to quickly find Customers by their Custom field which in this case is their Category 3 code. Customise your Customer Code lookup so that your Custom field will display in the Word Lookup Grid.

**Maintain > Accounts Receivable > Customers**

Right Click on the Customer code field and click 'Customise'



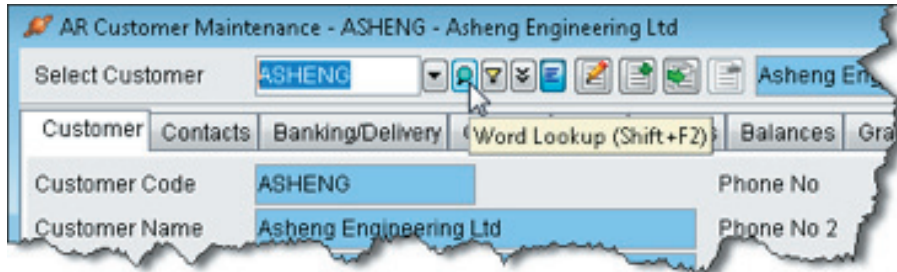
Scroll to the end of the list or press 'End' on your keyboard and click in the 'Visible' field beside your Custom field.



Then press Save. →

To use Word Lookup:

Click the Word Lookup Icon beside the Customer Code (or press Shift+F2)



Enter your search criteria and press the Lookup button or press the Enter key and Accredo will display the customers matching your search.

I entered the Word 'med' which is my Custom Category3 field and Accredo found customer DALTON as expected. ■

