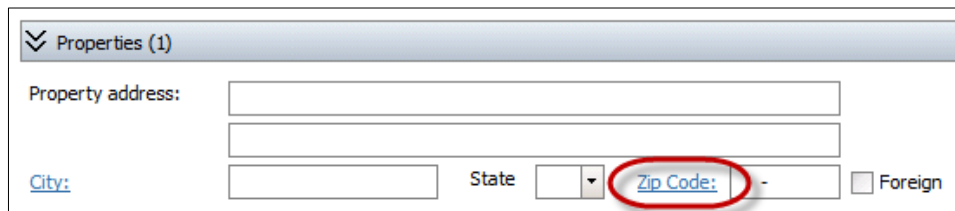Lookup tables are a convenient way to pull in previously saved entries, which saves you time. This job aid describes:

A. Selecting an entry from a lookup table

1. Click the blue link (or in the field press the F9 key)

2. Retrieve an entry in the table by doing the following:
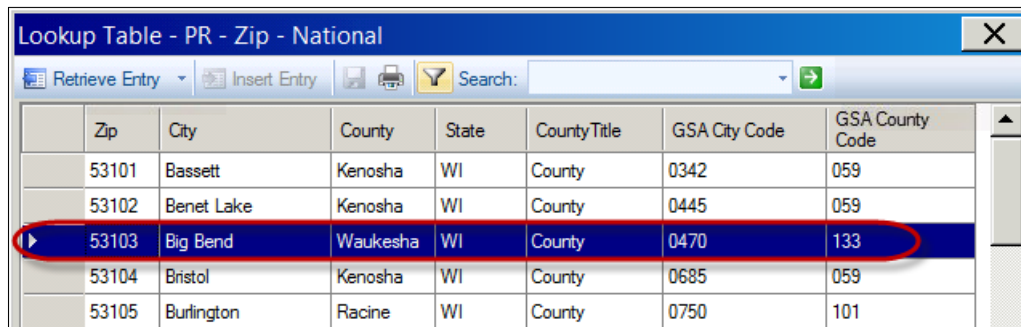
Mouse

Double-click a row

or

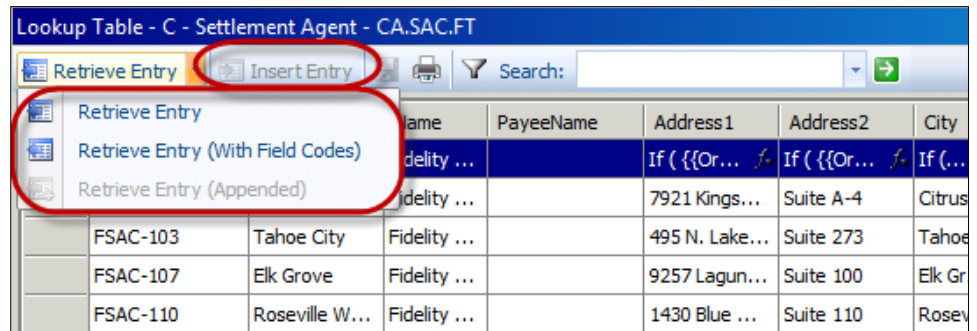a) Highlight the row

b) Click the Retrieve Entry button

Keyboard

a) Press the Tab key

b) Use the arrow keys within the grid to highlight a row

c) Press the Enter key (or press Alt + R)

Lookup Table - PR - Zip - National

	Zip	City	County	State	CountyTitle	GSA City Code	GSA County Code
	53101	Bassett	Kenosha	WI	County	0342	059
	53102	Benet Lake	Kenosha	WI	County	0445	059
▶	53103	Big Bend	Waukesha	WI	County	0470	133
	53104	Bristol	Kenosha	WI	County	0685	059
	53105	Burlington	Racine	WI	County	0750	101

B. Retrieving Options

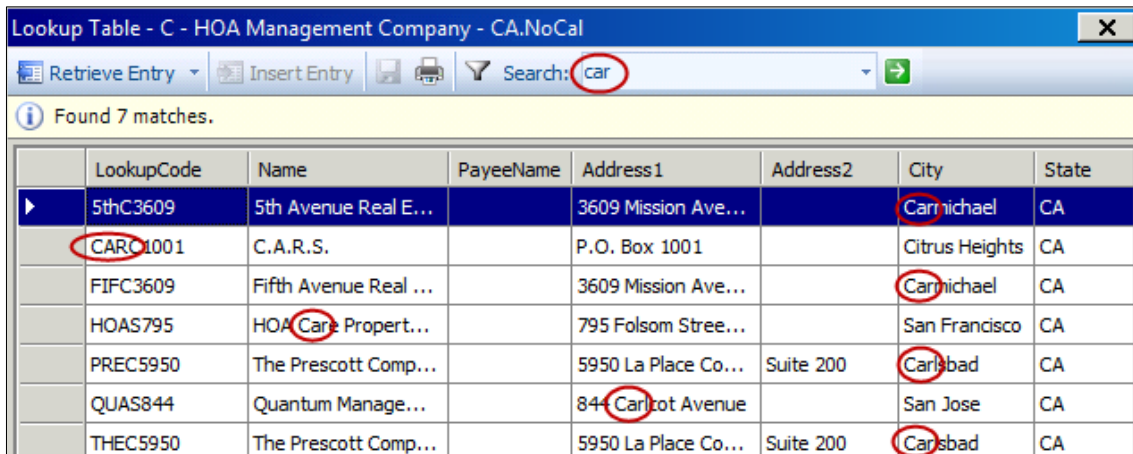When retrieving an entry from a lookup table, there are four options.

Button	Keyboard shortcut	Action	When to use
Retrieve Entry	Alt + R	Retrieves the selected entry from the list placing the information in the order	Used most often
Retrieve Entry (With Field Codes)	Alt + E	Retrieves the selected entry from the list placing the information in the order without any prompts; data retrieved includes field codes	Used to correct field codes
Retrieve Entry (Appended)	Alt + T	Retrieves the selected entry from the list allowing you to go back to select a second entry from the same lookup table to be inserted into the same text field	Used primarily by Title in the Exceptions and Requirements lookup tables
Insert Entry (permission-based)	Alt + N	Inserts a new entry from the order into the lookup table	Inserts all new entries at the bottom of the lookup table list

C. Quick Searching Lookup Tables

The Quick Search feature searches all fields in the table, returning all matches.

1. In the Search field , enter a keyword (or the first few characters of a keyword)
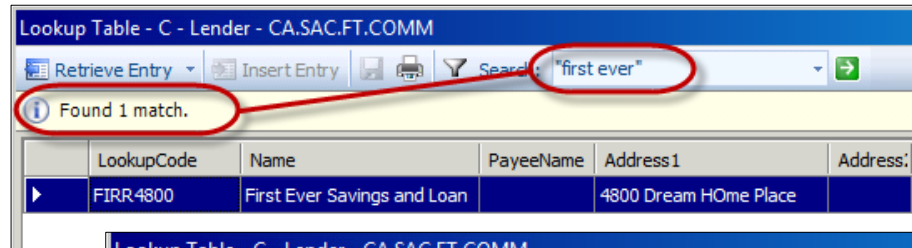2. Click the Execute ➡ icon (or press the Enter key)

3. Retrieve the appropriate entry from the results
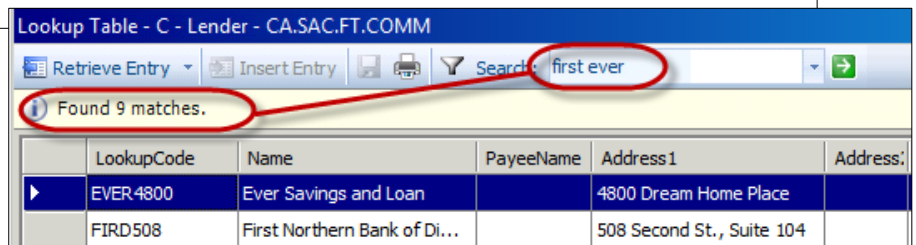
Quick Search Tips

Multiple Words – When searching for a name with multiple words, place the name in quotes. Otherwise the system searches for each word independently from the other. In our example, we are searching for First Ever Savings & Loan.
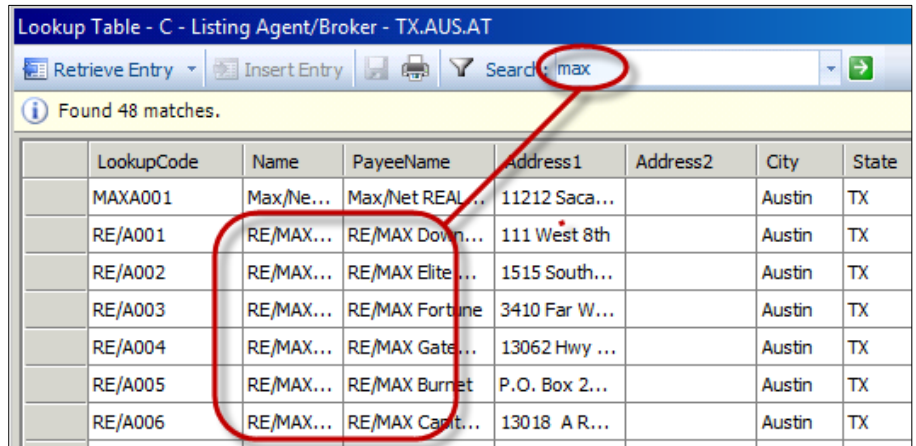
"*first ever*" in quotes = 1 match

	LookupCode	Name	PayeeName	Address1	Address:
▶	FIRR4800	First Ever Savings and Loan		4800 Dream HOme Place	

first ever without quotes = 9 matches (because each word is searched independently)

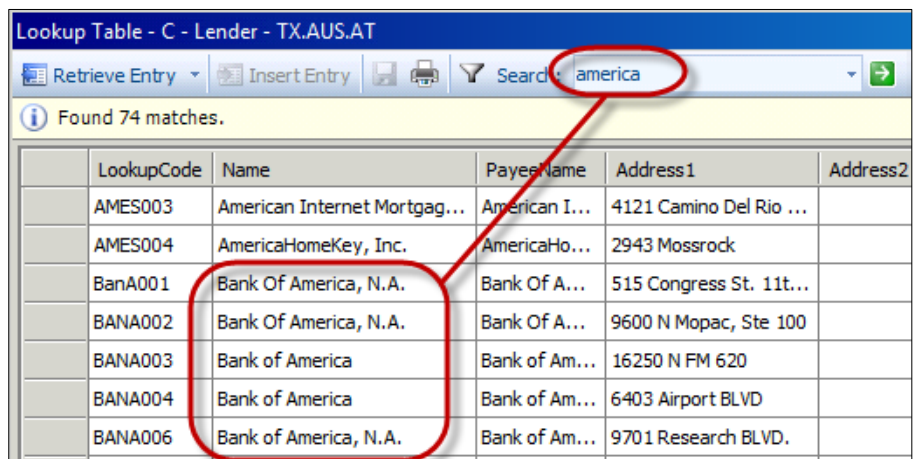|	LookupCode	Name	PayeeName	Address1	Address:
▶	EVER4800	Ever Savings and Loan		4800 Dream Home Place	
	FIRD508	First Northern Bank of Di...		508 Second St., Suite 104	

Symbols – Symbols are not searchable. For example, in Re/Max, the forward slash (/) is not searchable. The best way to search for Re/Max is to search for *max*.

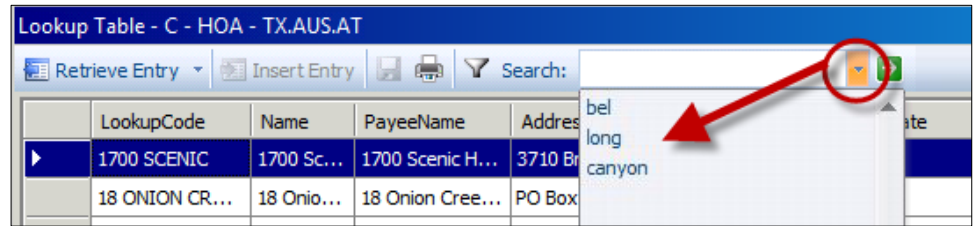|	LookupCode	Name	PayeeName	Address1	Address2	City	State
	MAXA001	Max/Ne...	Max/Net REAL...	11212 Saca...		Austin	TX
	RE/A001	RE/MAX...	RE/MAX Down...	111 West 8th		Austin	TX
	RE/A002	RE/MAX...	RE/MAX Elite ...	1515 South...		Austin	TX
	RE/A003	RE/MAX...	RE/MAX Fortune	3410 Far W...		Austin	TX
	RE/A004	RE/MAX...	RE/MAX Gate...	13062 Hwy ...		Austin	TX
	RE/A005	RE/MAX...	RE/MAX Burnet	P.O. Box 2...		Austin	TX
	RE/A006	RE/MAX...	RE/MAX Capit...	13018 A R...		Austin	TX

Generic Words – Most prepositions, articles, and pronouns are not searchable. For example, in Bank of America the preposition "of" is not searchable. The best way to search for Bank of America is to search for the most unique word in the name. In our case, *america*.

	LookupCode	Name	PayeeName	Address1	Address2
	AMES003	American Internet Mortgag...	American I...	4121 Camino Del Rio ...	
	AMES004	AmericaHomeKey, Inc.	AmericaHo...	2943 Mossrock	
	BanA001	Bank Of America, N.A.	Bank Of A...	515 Congress St. 11t...	
	BANA002	Bank Of America, N.A.	Bank Of A...	9600 N Mopac, Ste 100	
	BANA003	Bank of America	Bank of Am...	16250 N FM 620	
	BANA004	Bank of America	Bank of Am...	6403 Airport BLVD	
	BANA006	Bank of America, N.A.	Bank of Am...	9701 Research BLVD.	

NOTE: A complete list of symbols and generic words is available on Page 6.
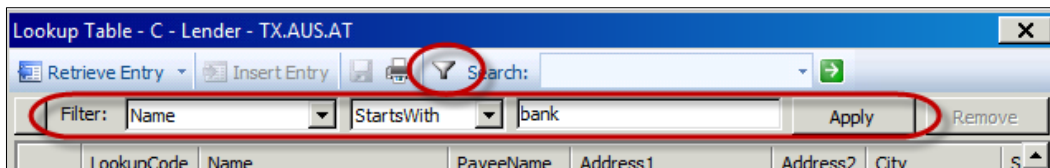
The Search field retains all search criteria entered for that lookup table until you log off. Click the drop-down arrow to re-run a previous Quick search.

D. Filtering Lookup Tables
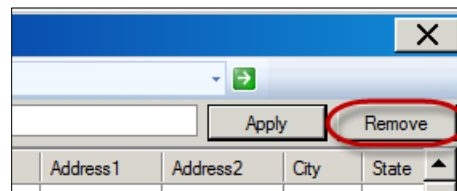
The Filter feature allows you to narrow the search results based on specific criteria in specific fields. Symbols and generic words do **NOT** apply when using the filter.

1. Click the Show Filter ⧩ icon

2. From the drop-downs, select a filter and parameter; enter criteria; click Apply

3. Retrieve the appropriate entry from the results

The Remove button returns the full list.

Complete List of Symbols & Generic Words

$	each	must	they
/	f	my	this
_	for	n	those
-	from	newer	through
&	g	now	to
a	get	o	too
about	got	of	u
after	h	on	under
all	had	only	up
also	has	or	v
an	have	other	very
and	he	our	w
another	her	out	was
any	here	over	way
are	him	p	we
as	himself	q	well
at	his	r	were
b	how	s	what

be	i	said	where
because	if	same	which
been	in	see	while
before	into	should	who
being	is	since	with
between	it	some	would
both	j	still	x
but	k	such	y
by	l	t	you
c	like	take	your
came	m	than	
can	make	that	
come	many	the	
could	me	their	
d	might	them	
did	more	then	
do	most	there	
e	much	these	