

# To Create a New Entity by Using a Lookup Table

- 1 On the Cases (CR306000) form, add a new record.

**SweetLife** Search... SweetLife Fruits & Jams SweetLife Head Office and Wh... 5/9/2025 10:18 AM David Chubb

Cases **New Record** Note Files

Case ID: <NEW> Business Account: Location: Contact: Owner: Subject:

Case Class: JREPAIR - Repair of juicers Status: New Reason: Unassigned

Reported On: Severity: Medium Priority: Medium

DETAILS ADDITIONAL INFO ATTRIBUTES ACTIVITIES RELATED CASES RELATIONS

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Your product is in trial mode. Only two concurrent users are allowed. ACTIVATE

- 2 In the Case Class box, select the case class.

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Cases **New Record** Note Files

Case ID: <NEW> Business Account: Location: Contact: Owner: Subject:

Case Class: JREPAIR - Repair of juicers Status: New Reason: Unassigned

Reported On: Severity: Medium Priority: Medium

**Select - Case Class**

Description	Case Class ID	Min. Billable Time	Internal	Include System Activities in Response Time Calculation
Sale and delivery of products, such as fru...	DELIVERY	00:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Internal cases from SweetLife employees...	ITHELP	00:00	<input type="checkbox"/>	<input type="checkbox"/>
Repair of juicers	JREPAIR	00:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pre-sales requests from potential clients ...	PRESALE	00:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Product Support - Incident	PRODSUPINC	00:00	<input type="checkbox"/>	<input type="checkbox"/>
Services Consulting	SERVCONS	00:00	<input type="checkbox"/>	<input type="checkbox"/>
Support Cases	SUPPORT	00:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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3 In the **Business Account** box, select the business account.

The screenshot shows the SweetLife software interface. The top navigation bar includes the SweetLife logo, a search bar, and user information: SweetLife Fruits & Jams, SweetLife Head Office and Wh..., 5/9/2025 10:18 AM, and David Chubb. The left sidebar contains various menu items: Favorites, Data Views, Time and Expenses, Banking, Construction, Payables, Receivables, Sales Orders, Purchases, Inventory, and More Items. The main area is titled 'Cases' and 'New Record'. It features a form with fields for Case ID, Case Class, Status, Reason, Business Account, Location, Contact, Owner, and Subject. A modal window titled 'Select - Business Account' is open, displaying a table of business accounts. The table has columns for Account Name, Account ID, Type, Class, and Custom. The first row is highlighted.

Account Name	Account ID	Type	Class	Custom
Allen's Bakery	ABAKERY	Customer	BAKERY	Active
Biscuit City Café	BISCCITY	Customer		Active
Blue Cafe	BLUECAFE	Customer		Active
Cakeado Cafe	CAKADO	Customer	CAFE	Active
Candy Cafe	CANDYY	Customer		Active
Citrus Store	CITRUS	Customer		Active
FourStar Coffee & Sweets Shop	COFFEESHOP	Customer		Active
Delicious Energy Restaurant	DELIENERGY	Customer	CAFE	Active
EasyDiner Co.	EASYDINER	Customer		Active
eCommerce Guest Customer	ECOMGUEST	Customer		Active
The Equity Group Investors	EQUGRP	Customer		Active
Food Clever	FOODCLVR	Customer	STORE	Active
Cafe French Bun	FRBUN	Customer		Active
Fruitico Coffee and Cakes	FRUITICO	Customer		Active
GoodFood One Restaurant	GOODFOOD	Customer		Active

4 In the **Contact** box, note that the primary contact of the business account is automatically selected. In the **Subject** box, enter a subject of the case.

The screenshot shows the SweetLife software interface with the 'New Record' form. The 'Business Account' field is now populated with 'BLUECAFE - Blue Cafe'. The 'Contact' field is populated with 'Chris Rea'. The 'Subject' field contains the text 'Return of two juicers'. The 'Severity' and 'Priority' dropdowns are set to 'Medium'. The 'Details' tab is selected, and the text editor is visible.

5 In the Severity box, select the severity of the case.

The screenshot shows the SweetLife software interface. The top navigation bar includes the SweetLife logo, a search bar, and user information for David Chubb. The main content area is titled 'Cases' and 'New Record'. It features a form with several fields: Case ID (<NEW>), Case Class (SUPPORT - Support Cases), Status (New), Reason (Unassigned), Business Account (BLUECAFE - Blue Cafe), Location, Contact (Chris Rea), Owner, and Subject (Return of two juicers). On the right side, there are dropdown menus for Reported On, Severity, and Priority. The Severity dropdown is open, showing options: Low, Medium (highlighted), High, and Urgent. Below the form is a rich text editor with a toolbar and a text area. The bottom status bar indicates 'Your product is in trial mode. Only two concurrent users are allowed.' and an 'ACTIVATE' button.

6 In the Priority box, select the priority of the case.

This screenshot is identical to the one above, showing the SweetLife software interface. The main difference is that the Priority dropdown menu is open, showing options: Low, Medium (highlighted), and High. The Severity dropdown remains closed and set to 'Medium'. The rest of the interface, including the form fields and navigation elements, is the same as in the previous screenshot.

7 On the **Details** tab, in the text area, enter a detailed description of the case or relevant notes.

The screenshot shows the SweetLife software interface. The top navigation bar includes the SweetLife logo, a search bar, and user information (SweetLife Fruits & Jams, SweetLife Head Office and Wh..., 5/9/2025 10:18 AM, David Chubb). The left sidebar lists various modules: Favorites, Data Views, Time and Expenses, Banking, Construction, Payables, Receivables, Sales Orders, Purchases, Inventory, and More Items. The main content area is titled 'Cases New Record' and features a form with the following fields:

- Case ID: <NEW>
- Case Class \*: SUPPORT - Support Cases
- Status: New
- Reason: Unassigned
- Business Account \*: BLUECAFE - Blue Cafe
- Location: (empty)
- Contact: Chris Rea
- Owner: (empty)
- Subject \*: Return of two juicers
- Reported On: (empty)
- Severity: Medium
- Priority: Medium

The 'DETAILS' tab is selected, and the text area contains the note: 'Need to pick up two juicers from Blue Cafe.' The bottom status bar indicates 'Your product is in trial mode. Only two concurrent users are allowed.' and 'ACTIVATE'.

8 On the form toolbar, click **Save**.

This screenshot is identical to the one above, but with a red box highlighting the 'Save' button in the form toolbar. The 'Save' button is located in the top-left corner of the form toolbar, next to the 'Open' button. The rest of the interface, including the form fields and the text area, remains the same.