Finding a Set of Records

Last Modified on 05/23/2018 6:43 pm EDT

aACE features a number of tools to help you locate the records you need. This overview highlights the available tools and suggests tips for getting the records you want. For step-by-step instructions, follow the links to more specific articles.

Quick Search Bar

The quick search bar is located at the top of every list view screen. It provides quick access to the fields most often searched within the module. It also provides functionality for immediately working with the records you find, a link to the advanced search screen, and the ability to clear search criteria with a single click. Read more about using the Quick Search bar .

Advanced Searches and Saved Queries

The advanced search screen gives you to access all available search fields. It also allows you to write advanced queries and save them for reuse. Read more about advanced search functionality .

Search Operators

Search operators can help you quickly broaden or narrow your desired record set. Read more about using search operators .

Removing Records from a Found Set

You can refine your search results by omitting records one at a time or by using the omit features in quick and advanced search. Read more about removing records from your search results .

Adding Records to a Found Set

You can refine your search results by including additional records with the quick search bar or advanced search screen. Read more about adding records to your search results .

Finding Related Records

aACE provides tools that allow you to quickly find additional records related to your current found set. For example, if you are working with a list of company records, you can quickly find all related leads. Read more about using aACE [Related Records links](#) .

Sorting Found Sets

After finding your records, you'll often want to organize them into a more useful presentation. Read more about how you can [sort and group records](#) .