Using aACE's Quick Search Features

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> This guide provides tips for more effectively using aACE's Quick Search functionality. It is intended for general users.

The list view in each module contains various searching features to assist you in narrowing down your record lists. You can get as detailed as you need with aACE's searching. This guide uses the Companies module as an example, but the features shown are found in every aACE module.

Quick Search Bar

The Quick Search bar is located at the top of every module's list view.

1. Navigate from **Main Menu** > **CRM & Sales** > **Companies**.
2. Enter keywords and operators (https://aace6.knowledgeowl.com/help/using-search-operators-for-better-results) for your search.
   Note: To display *all* records, leave the search fields blank.
3. Click the **Search icon** (🔍).
   Note: Remove *all* search terms by clicking the Omit icon (⊖) at the left of the list view.
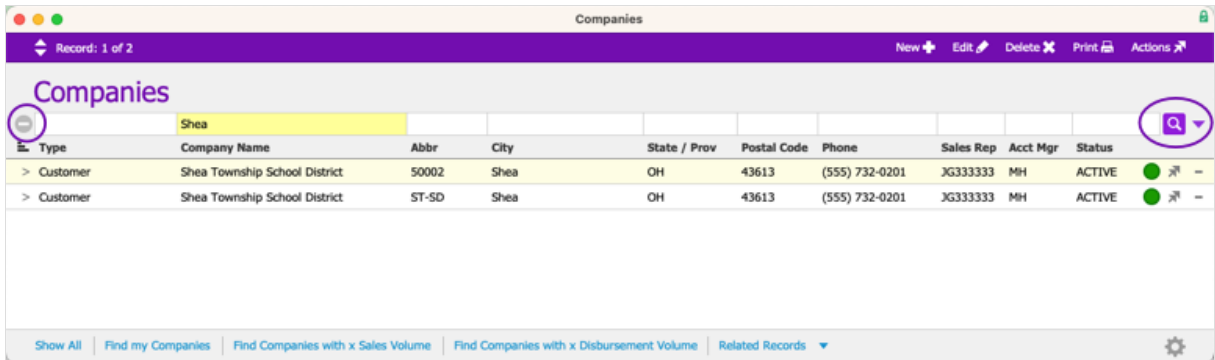

By default, searching in aACE focuses on initial letters and numbers. To search for records using information from the middle or end of a data point, start your search term with an asterisk (*). For example, to display companies involving the names Jensen and Christiansen, search for "*sen".

Additional Search Options

You can click on the Search Options icon (▾) to display a drop-down menu with additional

searching options. These options focus on refining your search results further than basic searching.
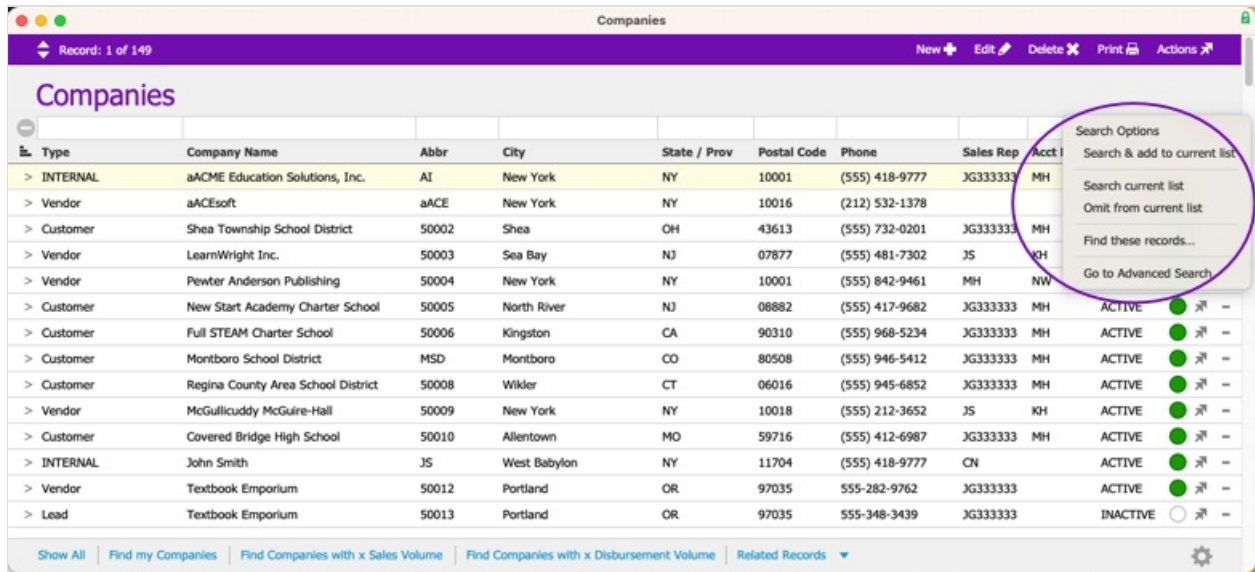
- **Search & add to current list** — Queries the database for new search criteria and includes any matching records with the current list.
- **Search current list** — Refines the current records to *retain* only the items that match the new criteria.
- **Omit from current list** — Refines the current records to *remove* any items that match the new criteria.
  Note: This option is useful for filtering to show all records that do *not* have a value. For example, typing an asterisk (*) in the Phone column, then selecting the omit option will display all records that do not have a phone number.
- **Find these records...** — See section below.
- **Go to Advanced Search** — Displays the [Advanced Search screen](https://aace6.knowledgeowl.com/help/understanding-advanced-search-functionality).

'Find These Records...' Search Functionality

aACE allows you refine your search results using the 'Find these records...' search functionality.

1. Navigate from **Main Menu** > **CRM & Sales** > **Companies**.
2. Click the **Search Options icon** (▼), then select **Find these records....**
3. In the Multiple Record Search window, add your search terms by separating each on a new line in the text box.
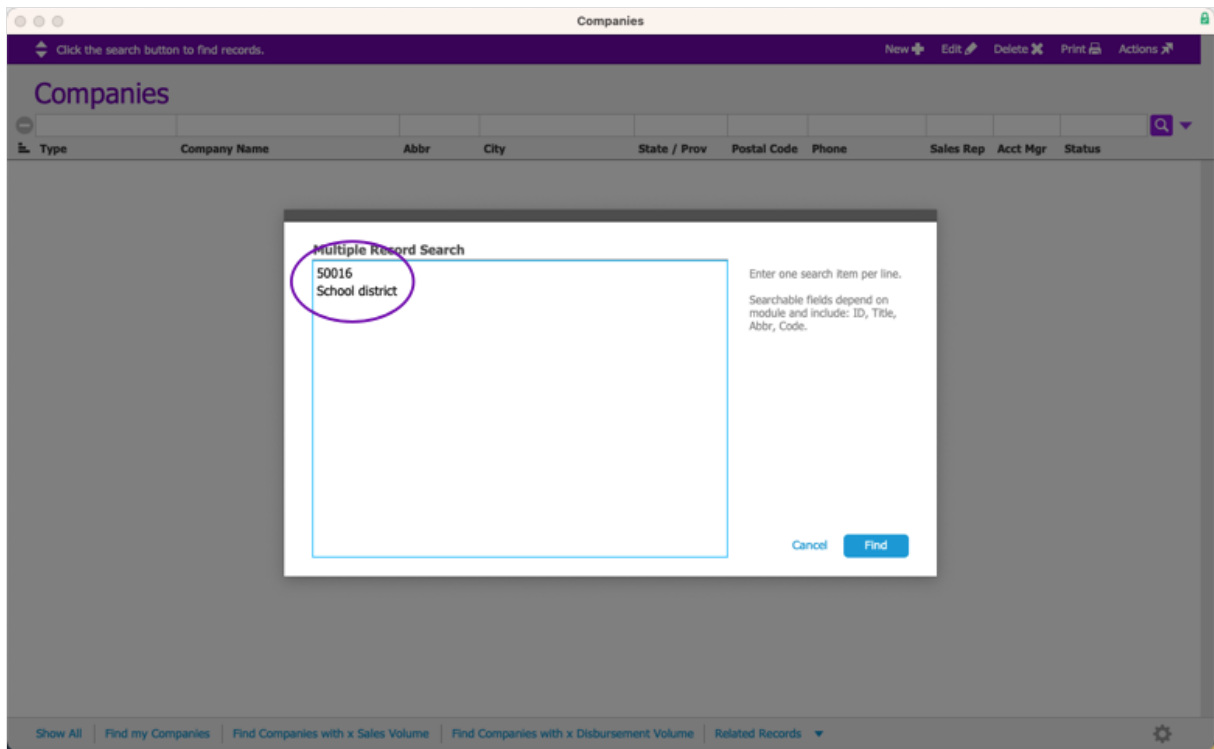
4. When all of your search terms are listed in the Multiple Record Search window, click **Find**.