

# Understanding Advanced Search Functionality

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This guide explains how to access and use the advanced search tools. It is intended for advanced users.

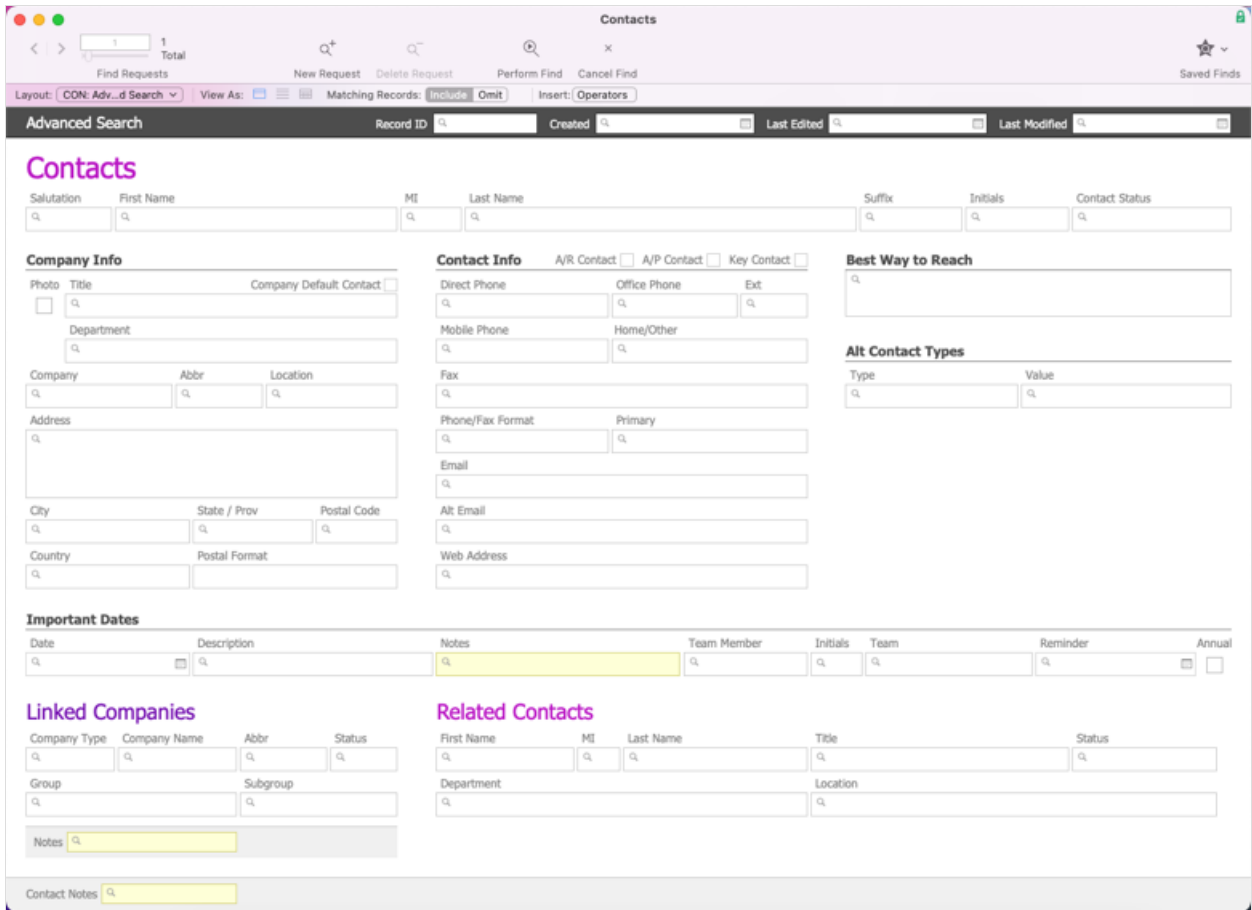
aACE features a variety of tools to help you build, save, and reuse complex search queries. You can display the advanced search screen by:

- Pressing ⌘+F (Mac) or CTRL+F (PC)
- Clicking the FileMaker menu options Go > Advanced Search
- Clicking the drop-down arrow at the right of the Quick Search bar and selecting Go to Advanced Search

These tools are similar across aACE modules. This guide uses the Contacts module as an example.

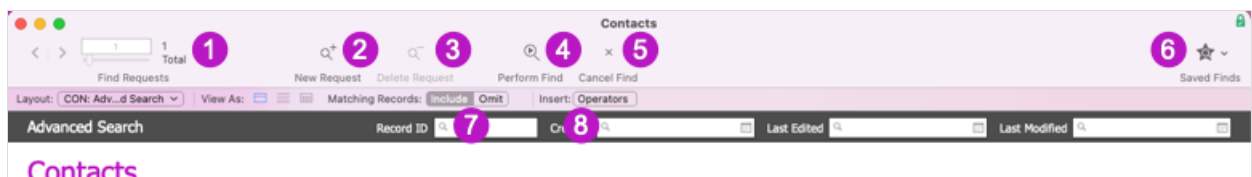
## The Advanced Search Screen

The layout of the advanced search screen resembles the detail view of the module where you accessed it. For example, from the Contacts module, the advanced search screen is similar to the Contacts detail view. It provides search access to all fields, including the note fields. You can also search relevant fields for related records, such as linked companies or related contacts.



## Advanced Search Tool Bar

The tool bar at the top of the Advanced Search screen gives you the power to build sophisticated queries. You do this by stacking multiple, simple search requests into a single, complex query. Then you can save these queries to easily reuse them later.



1. Find Requests – Browse through current search requests, using the arrows, number box, or slider to navigate between them
2. New Request – Build more elaborate searches by adding an "OR" statement to the query  
Example: You could search for all contacts with the last name of Smith OR the last name of Jones: 1) Fill out the query screen for Last Name "Smith", 2) click New Request, 3) complete a second query screen for Last Name "Jones", 4) click Perform Find.
3. Delete Request – Remove the currently displayed request from the query
4. Perform Find – Run the query and display the records matching your criteria

5. Cancel Find – Dismiss the search requests and query, returning to the module's list view screen
6. Saved Finds – Display the menu to save a query or to edit and reuse an existing one (see below)
7. Include / Omit – Toggle whether to select the records that match your current criteria or to exclude them and return all *other* records
8. Insert: Operators – Use these options from the drop-down list to further define the acceptable values for a given field in each request (see below)

For additional versatility, you can also use features from the FileMaker menu bar Search option:

- Duplicate Request – Creates a new request, but includes all the current criteria which you can then edit
- Constrain Found Set – Performs the find, but *removes records* from those currently displayed that match the additional criteria
- Extend Found Set – Performs the find, but *adds records* matching the additional criteria to the records that are currently displayed

## Using Advanced Search Features

### Saved Finds and Reusing Queries

After you develop a strong, useful query, you can store it for future use.

#### Save a Query

1. Enter each of the search requests needed.
2. Click **Saved Finds > Save Current Find**.
3. Enter a name to identify the overall query.
4. Click **Save**.

#### Use a Saved Query

1. At the Advanced Search screen, click **Saved Finds**.
2. From the drop-down menu, select the desired query.
3. If needed, modify the saved criteria.
4. Click **Perform Find**.

#### Edit a Query

1. Click **Saved Finds > Edit Saved Finds**.
2. Select the query you want to update.
3. At the bottom of the Edit Saved Finds dialog box, click **Edit**.
4. On the Specify Options... dialog box, click **Advanced**.
5. At the Specify Find Requests dialog box, select a request and click **Edit**.
6. Make the needed changes.  
Note: You can also duplicate or delete specific requests.
7. Click **OK**.

## Using Operators

Operators are symbols that further define acceptable values for the criterion in a field. For example, you can use the <, >, and = in date and numeric fields to restrict the results.

Likewise, you can use an ellipse (...) to define a range of numbers or dates.

To add [operators](https://aace6.knowledgeowl.com/help/using-search-operators-for-better-results) to a search request, select the desired symbol from the Operators list (see above), then enter the field criterion.

### Examples of Operators

- =12/31/2021 – Searches for matches to the date
  - >1000.00 – Searches for amounts greater than 1,000
  - 1/1/2021...1/31/2021 – Searches for records within the date range (e.g. starting January 1 and ending with January 31)
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