# **Overview of Selectors**

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This guide reviews the selector feature in aACE modules. It is intended for general users.

Selectors are popup screens that provide increased efficiency for locating other records and linking them to a given record. You can open selectors by clicking search icons. You can open two different types of selectors, based on the icon you click:

- Single-selector ( ♀, ) Allows you to locate and add a single item.
- Multi-selector ( Q ) Allows you to locate and add multiple items to a record. (Note: Multi-selector icons are colored to match the header of the module. This example is from the Orders module.)

Selector functionality is consistent across all aACE modules. This guide uses the Orders module as an example.

# **Selector Icons**

The detail view of a sales order shows selectors for three uses:

Order: 6000	3 Title					08/01/	/23	· PE	NDING	C
Sales Order	Management Job Costs	& Approvals				Notices 😣	Tasks 🗹	Emails	🗹 Dor	cs (
ill To		🖈 Ship To	End Customer		*	Comment	s & Next S	teps		
il To >	📋 ♀ Customer PO #	Ship To >	Blind 🗌 💼 오	Ship Type Ship Da	ite					
				Complete 08/03	/23 🗆					
	Rate Card > Di	ec %		Inventory Bin						
	۹ 🚺				Q,					
	Billing Terms			Shipping Terms						
scription		Additional	Info			Next Step		N	ext Step Dat	ie.
	Demiction	Additional 1		Quantity BO DS SO	یری Unit Pr	Next Step	J	Total	ext Step Dat Margin 🛪	
der Items	Q 3	κ <sup>N</sup>		Quantity B0 DS S0			1			
rder Items		κ <sup>N</sup>		Quantity B0 DS S0	Unit Pr	ice Unit Adj		Total 0.00	Margin x <sup>™</sup>	
Code		κ <sup>N</sup>		Quantity B0 DS S0	Unit Pr	ice Unit Adj iubtotal idjustment fotal		Total 0.00 C 0.00 0.00	Margin x <sup>™</sup> 0%	
	Q 3	κ <sup>N</sup>			Unit Pr	ice Unit Adj iubtotal idjustment fotal	0.00	Total 0.00	Margin 3	

## 1. Field-Specific Single-Selector

Click the selector icon in the Rate Card (or other) field to specify a single record for that field.

#### 2. List-Level Multi-Selector

Click the selector icon above a list portal to open a multi-selector. This allows you to search for and specify multiple items for the list. The items you specify will populate each line with related data.

#### 3. Item-Level Single-Selector

Item-level search icons are typically found within list portals (e.g. the Order Items list). When you open a selector from a list-level icon, the item you specify will populate the line with related data.

# **Selector Features**

The data presented in a selector is specific to the field or list where the selector icon is located. For example, clicking the Order Items list-level search icon displays a selector populated with Order Item LICs:

Туре	Code	Description	Pref Vendor 🔍	Rec Type	Invtry On Hand	Available	Total	Sales Shi		_
2	SW							YES	ACTIVE	Q
Line Item Codes	2					Selected Li	ne Item Co	des 3		
🛨 Туре	Line Item Code				Avail Invtry	Line Item Cod	2			
Software	SW-ENG1 Sammy S	pellman's Grade 1 Spelling Bee			65 ^	SW-MATH1	Maggie Mati	hington Le	arns to Count	: ^
Software	SW-ENG2 Sammy S	pellman's Grade 2 Spelling Bee			65	SW-MATH2	Maggie Mati	hington Le	arns to Add	
Software	SW-ENG3 Sammy S	pellman's Grade 3 Spelling Bee			65	SW-MATH3	Maggie Mati	hington Le	arns to Subtra	act
Software	SW-ENG4 Sammy S	pellman's Grade 4 Spelling Bee			65	SW-MATH4	Maggie Mati	hington Fu	in With Fracti	ons
Software	SW-ENG5 Sammy S	pellman's Grade 5 Spelling Bee			65					
Software	SW-HIS1 History My	stery: Grade 1			75					
Software	SW-HIS2 History My	stery: Grade 2			75					
Software	SW-HIS3 History My	stery: Grade 3			75					
Software	SW-HIS4 History My	stery: Grade 4			75					
Software	SW-HIS5 History My	stery: Grade 5			75					
Software	SW-SCI4-MM Mega	Machines			50					
					v					
Displaying 15 of 15	found				Select All >>	« Remove A	•			
						4			Cancel S	iave

## 1. Quick Search Bar

The Quick Search Bar in a selector window functions the same as the <u>Quick Search</u> (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) bar in the list view. Note: You *cannot* change the provided criteria in grayed-out search fields.

# 2. Records List

Displays a list of available records (e.g. LIC records). You can modify this list using the Quick Search bar. You can select records in this list to add to the record you are working on.

## 3. Selected Line Item Codes List

When you click a record in the records list, aACE moves it to this list. When you click Save, the records you gather here are added to the record you are working on.

# 4. Select All / Remove All

The Select All button transfers all the records currently displayed in the records list to the selected records list. The Remove All button transfers all selected records back to the starting list.

Note: If you use the Select All button on a single-item selector window (i.e. field-specific or item-level), aACE displays a message reminding you that you can only select a single item.