

Saved search 🔗

This article applies to:

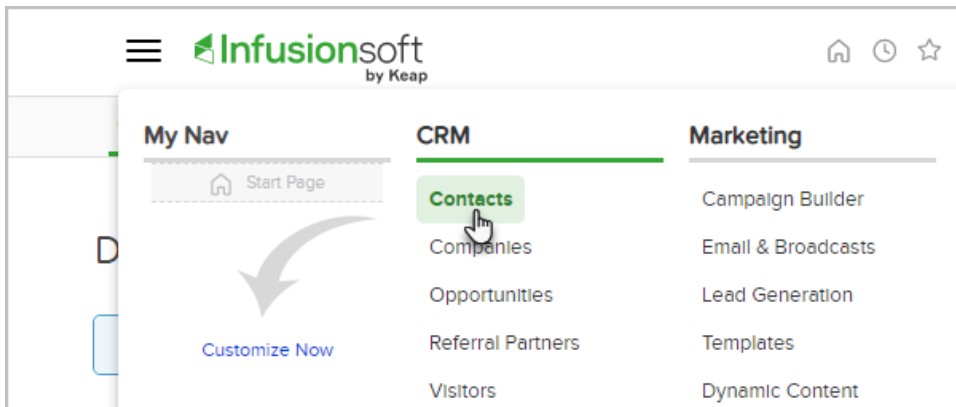
When you create a **Saved Search**, you save a set of criteria that determine which contacts show up in search results. The contacts listed in the results will change automatically as the people in your database respond to your marketing messages, make purchases, move through your sales pipeline, etc...

Saved Searches are dynamic lists and reports that can be referenced quickly. You can also print and export the lists (if your permissions allow) or manually apply actions to them.

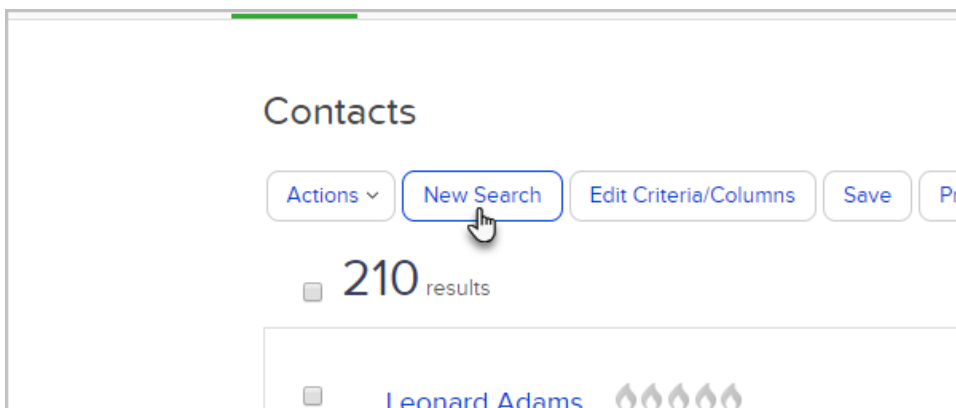
The following example is based on a contact search, but you are able to create a saved search from any record-type (Contacts, Companies, Referral Partners, Opportunities, Orders) in Infusionsoft.

Search contacts

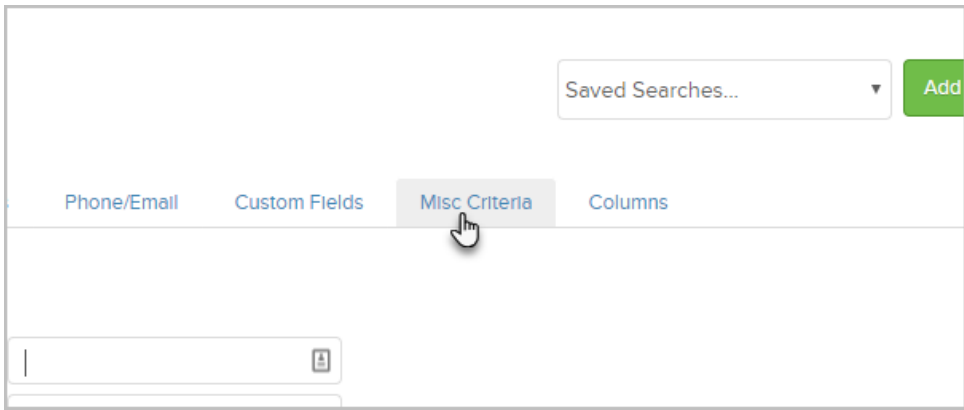
1. Go to CRM > Contacts



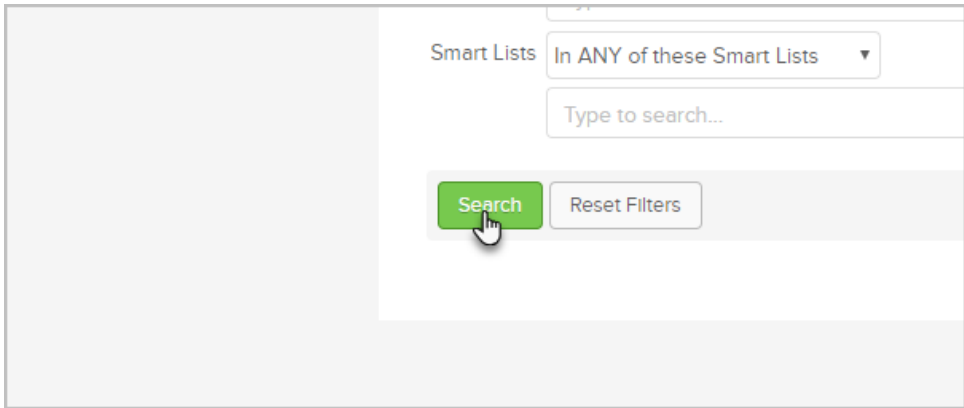
2. Click **New Search** to clear any previous search results



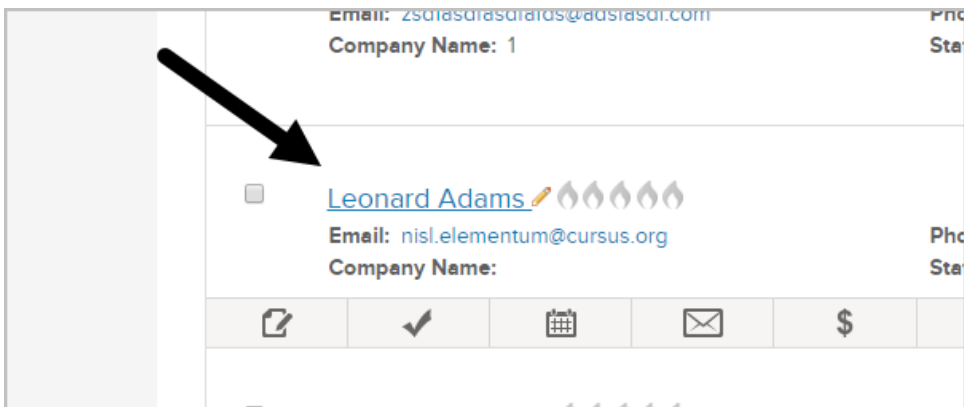
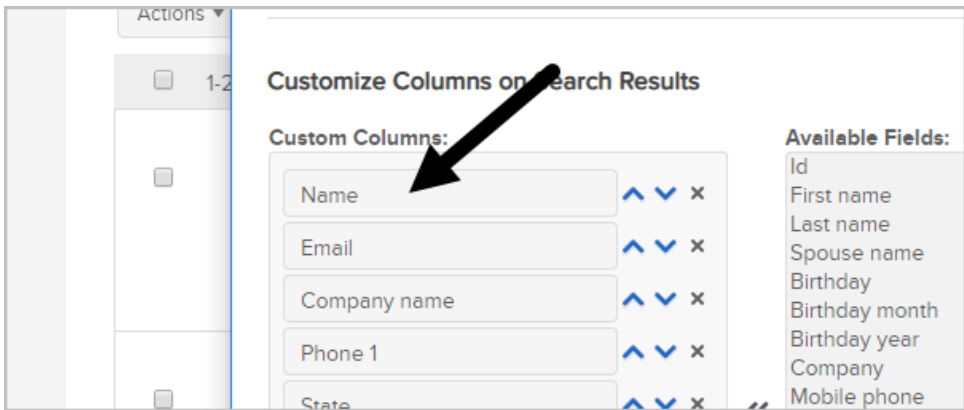
3. Navigate the tabs to find to add your search criteria



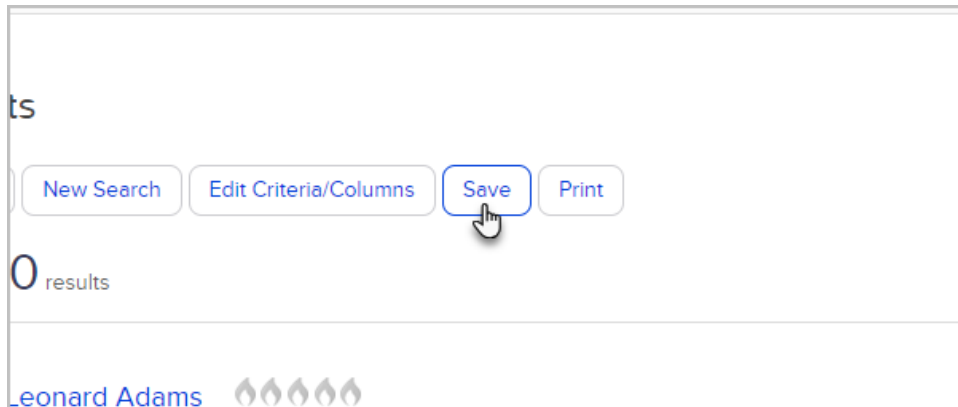
4. Click **Search**



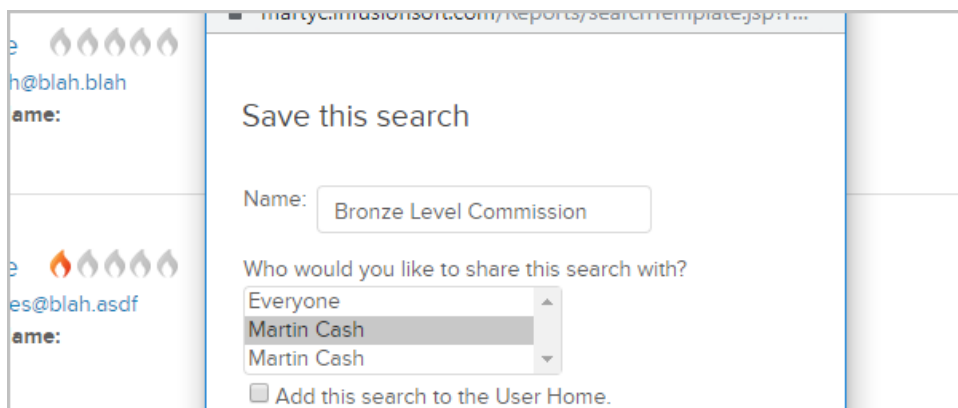
5. Include the Name column on the report since it is the **only field** that you can use to open the contact record. Note that the "Name" column is different than "First Name" and "Last Name" columns. Here is how you can [add the Name column](#) to the report if it is not already available.



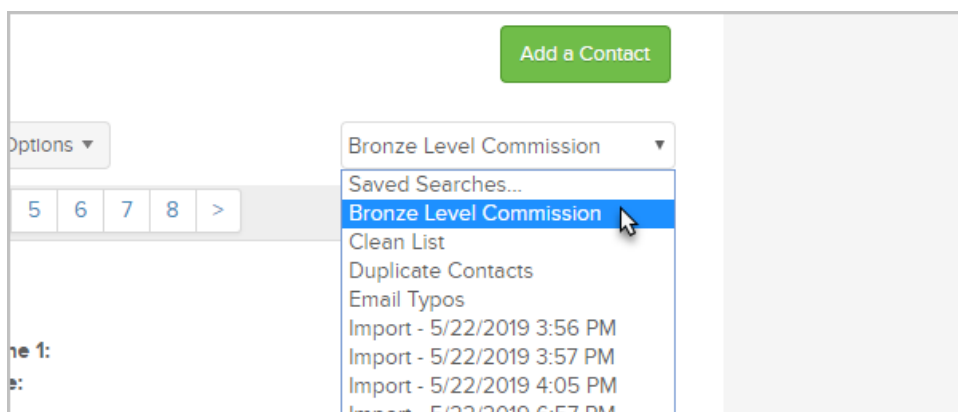
6. Click **Save** to name and save the dynamic list for quick access in the future. You are saving the search criteria, not a specific list, which means the save search will update automatically. The search criteria will display above the search results when you create and revisit the saved search.



7. **Name:** Enter a short, descriptive name for the search

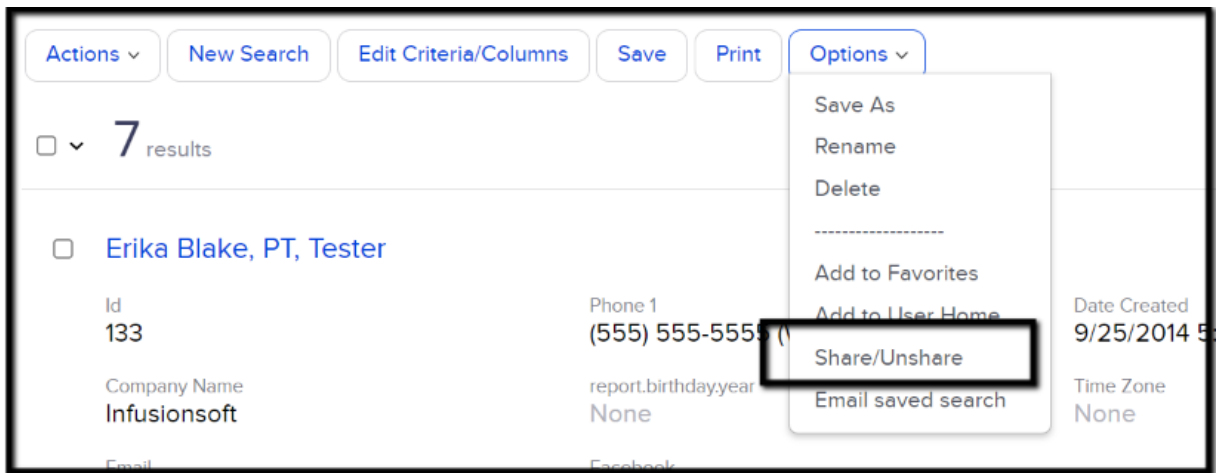


This name will display in custom drop-down menus

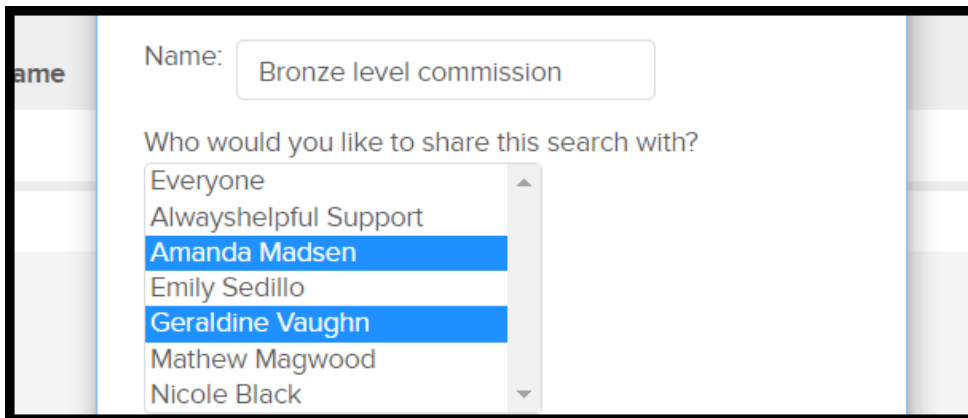


Share the search

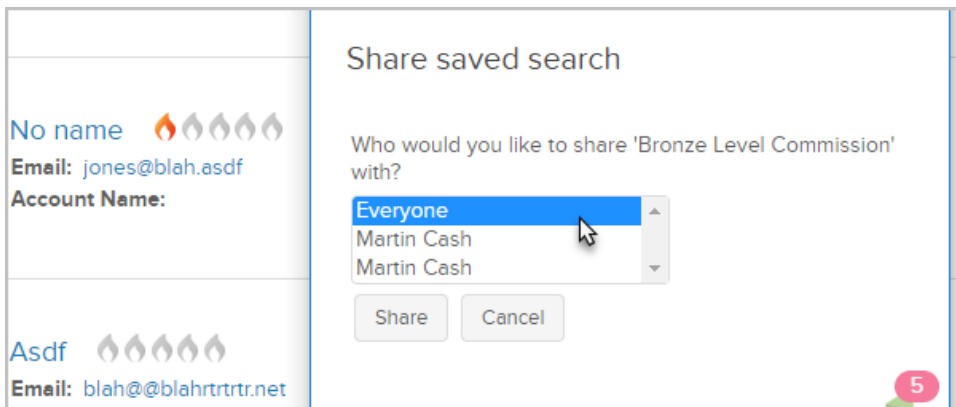
1. Pull up your saved search.
2. Click on the Options button > Click on Share/Unshare



3. Click on the name(s) of the users who need to see this search



4. Click **Everyone** to share the search with all users



5. Click the **Add this search to the User Home** checkbox if you want to add a saved search widget to your dashboard. For more information regarding the saved search widget, [click here](#)

o name

mail: jones@blah.asdf

ccount Name:

Name:

Who would you like to share this search with?

Everyone

Martin Cash

Martin Cash

Add this search to the User Home.

Save

sdf

mail: blah@blahrtrtr.net

ccount Name:

6. Click **Save**. The saved search is now available as a drop-down whenever you go to **CRM > Contacts**

Add a Contact

Options ▾

5 6 7 8 >

ne 1:

s:

Bronze Level Commission ▾

Saved Searches...

Bronze Level Commission

Clean List

Duplicate Contacts

Email Typos

Import - 5/22/2019 3:56 PM

Import - 5/22/2019 3:57 PM

Import - 5/22/2019 4:05 PM

Import - 5/22/2019 6:57 PM

7. Your search criteria will display above the search results. Any changes to the criteria will not be saved unless you click the Save button.

Contacts: The Jon's Add a Contact

Criteria

Doesn't have ANY of these Tags: Behavior -> Watched microsoft email sync video ✕ Behavior -> Visited Product A Order Form ✕

Leads -> Valuable Resource Downloaded ✕ Behavior -> Purchased Promo ✕

First Name starts with: jon

Actions ▾ New Search Edit Criteria/Columns... Save Print... Options ▾ The Jon's ▾

1-4 of 4 ☰

Jon Doe

Id: 227 **Email:**

Company Name: Keap 2 **State:**

Email saved searches

You can share saved search results via a one-time or recurring email.

1. Navigate to a new or saved search results page
2. Open the **Options** menu

Criteria
User contains any:

[Actions](#)
[New Search](#)
[Edit Criteria/Columns](#)
[Save](#)
[Print](#)
[Options](#)

7 results

Title	User	Creator	Completed
Web Form details	Chris Thomas		11-21-11

3. Click **Email saved search**

[ria/Columns](#)
[Save](#)
[Print](#)
[Options](#)

Chris Call activity

50

Creator	Action type	Contact
Thomas		
Thomas		

- Save As
- Rename
- Delete
-
- Add to Favorites
- Add to User Home
- Share/Unshare
- Email saved search

4. Enter a subject for the email, choose if the email should be sent only when the search has results, and select which day(s) to send the email

Note: To send the email on multiple days, hold Control (Windows) or Command (Apple) while clicking each day from the list

Up to 1,000 records will be sent through email. For larger lists, we recommend manually exporting the list.

Information

Subject

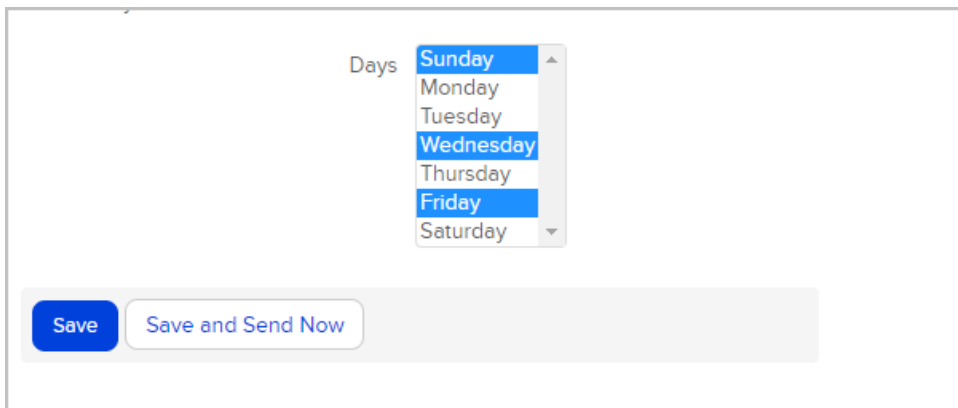
Notify

Only Send When Results Found Yes No

Days

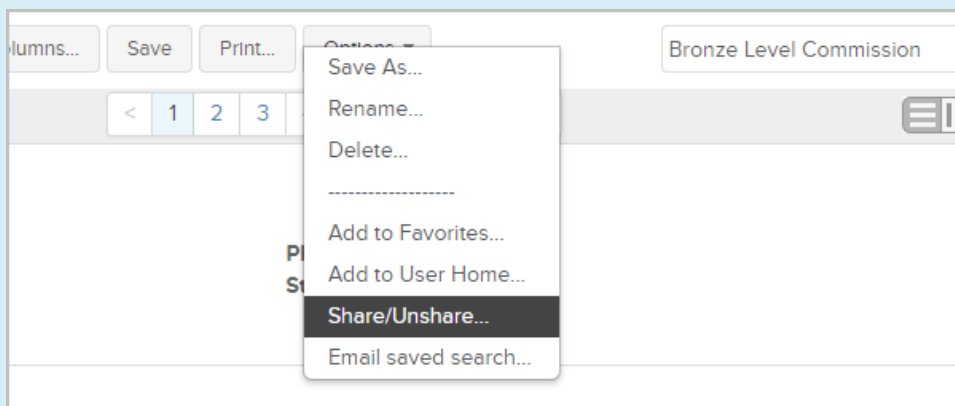
- Sunday
- Monday
- Tuesday

5. Click **Save** or **Save and Send Now**



Pro Tip! Click **Options** after you save a search for additional search needs.

- **Save As** - create a new search when criteria has been changed
- **Rename** - Change the search name
- **Delete** - Remove save search
- **Add to favorites** - add to black tool bar, under the star
- **Add User home** - add to another Users dashboard
- **Share/Unshare** - Share or unshare search with Users
- **Email save search** - Create an automated email report



Additionally, you can use the **Edit Criteria/Columns** tab to adjust the search criteria at a later date.