# Saved search

This article applies to:

Max Classic

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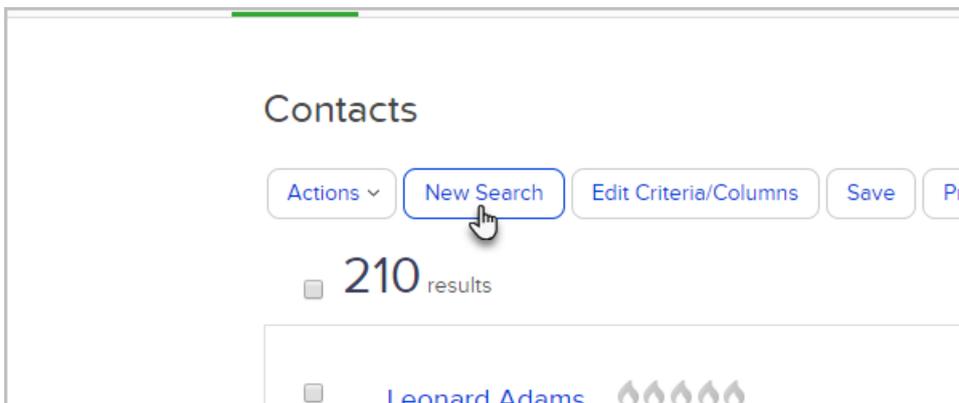
The following example is based on a contact search, but you are able to create a saved search from any record-type (Contacts, Companies, Referral Partners, Opportunities, Orders) in Max Classic.
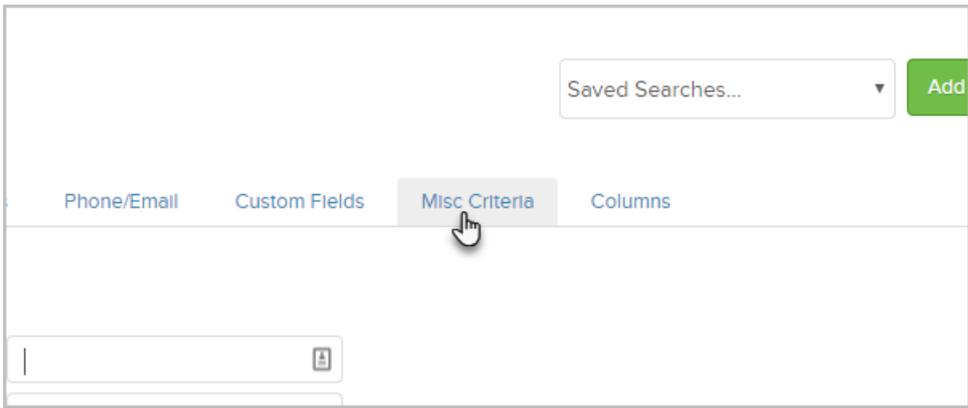
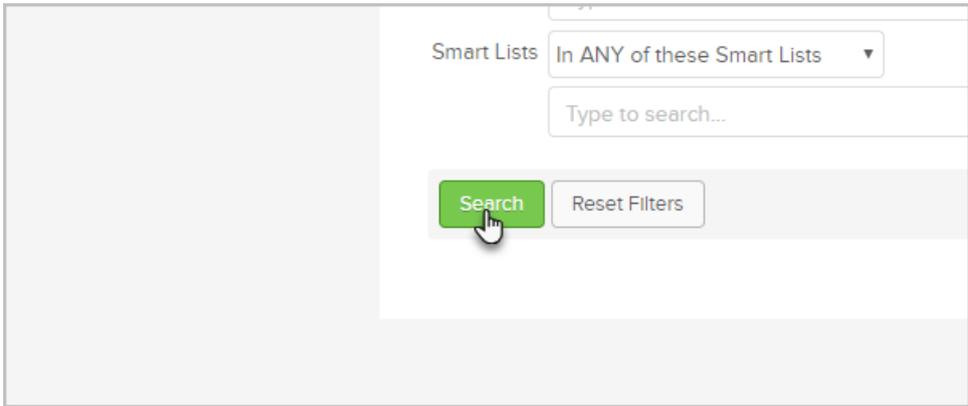## Search contacts

1. Go to **CRM > Contacts**
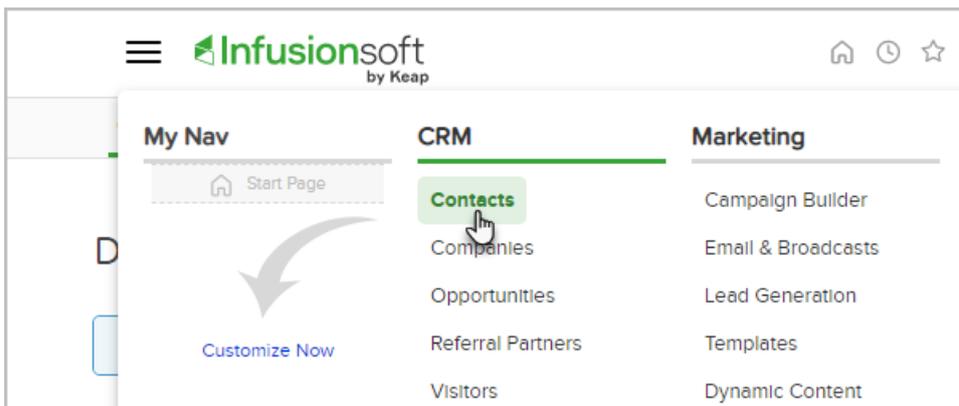
2. Click **New Search** to clear any previous search results

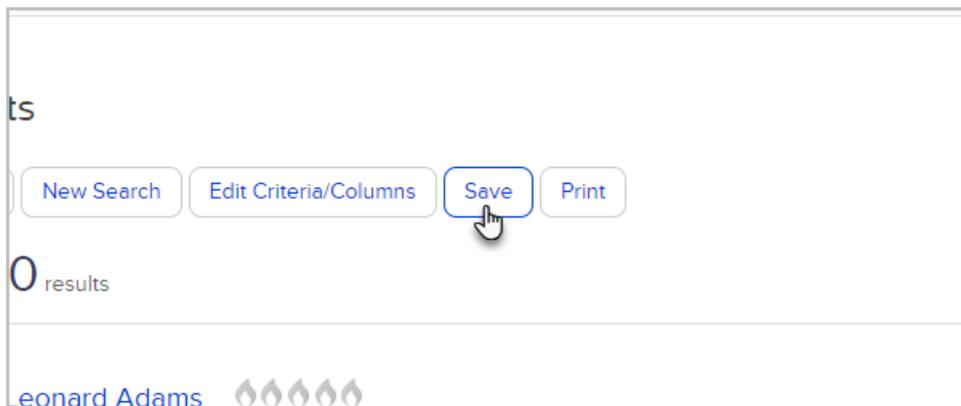3. Navigate the tabs to find to add your search criteria
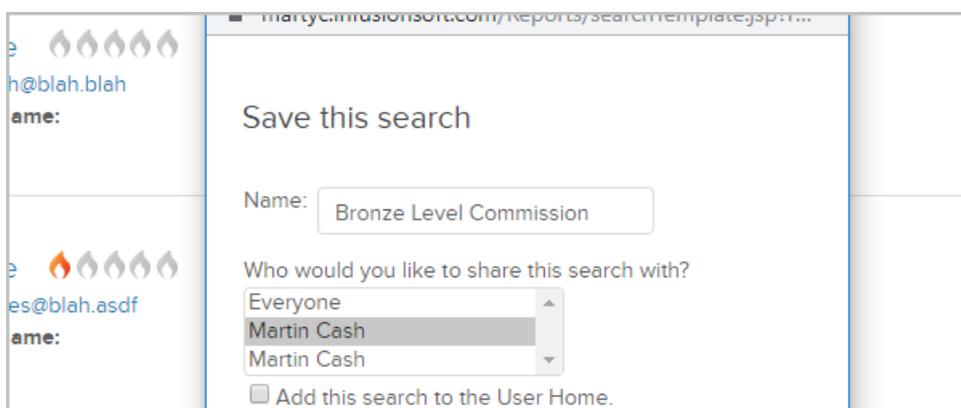
4. Click **Search**

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 that "First Name" and "Last Name" columns. Here is how you can
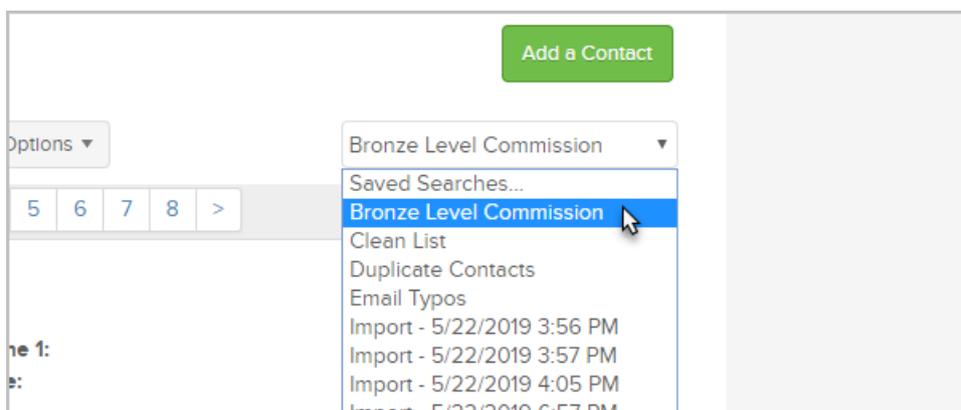   add the Name column to the report if it is not already available.
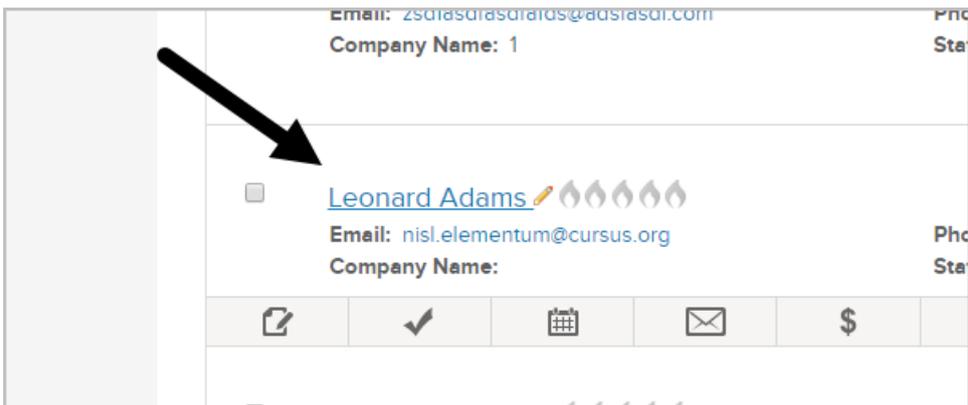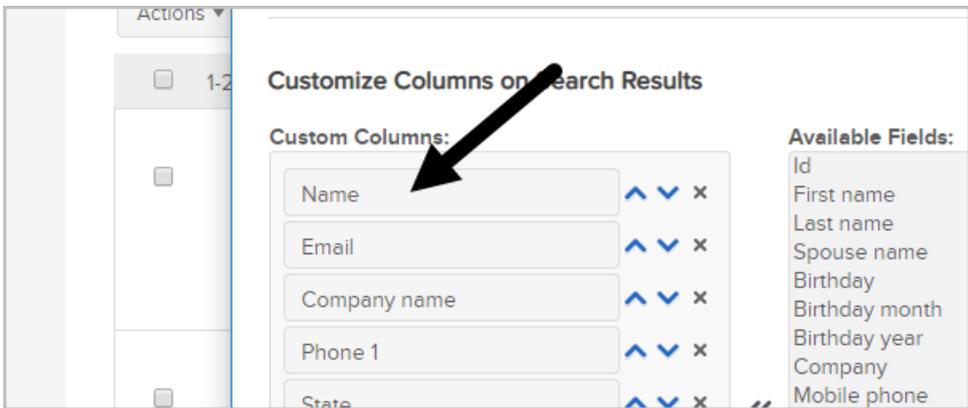
6. Click **Save** to name and save the dynamic list for quick access in the future. You are saving the search criteria, not a specific list, which means the save search will update automatically. The search criteria will display above the search results when you create and revisit the saved search.

ts

| New Search | Edit Criteria/Columns | Save | Print |

O results

Leonard Adams 🔥🔥🔥🔥🔥

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

martyc.infusionsoft.com/Reports/searchtemplate.jsp?t...

e 🔥🔥🔥🔥🔥
h@blah.blah
ame:

Save this search

Name: Bronze Level Commission

e 🔥🔥🔥🔥🔥
es@blah.asdf
ame:

Who would you like to share this search with?

Everyone
Martin Cash
Martin Cash

☐ Add this search to the User Home.

This name will display in custom drop-down menus

Add a Contact

Options ▼   Bronze Level Commission ▼

| 5 | 6 | 7 | 8 | > |

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

ne 1:
e:

Share the search

Pro Tip!: When a saved search is shared, the owner's column configuration applies to all users by default. However, once a shared user edits the columns (via Edit Criteria/Columns > Columns) on their end, they will have their own independent column settings for that search. From that point on, any column changes made
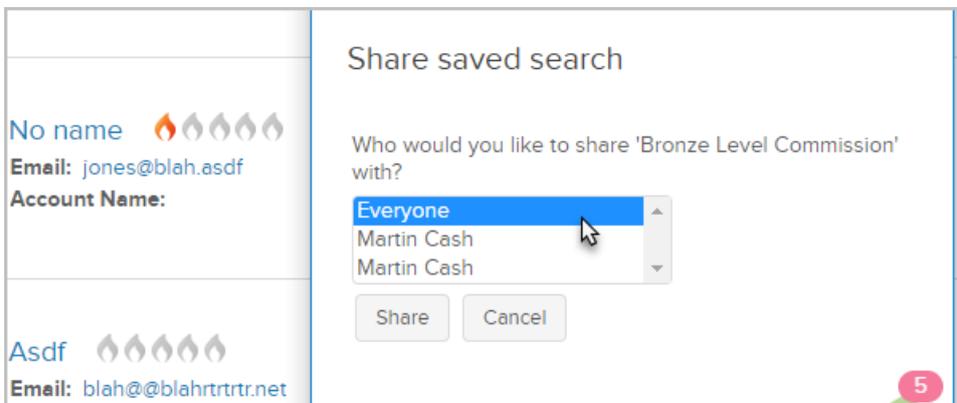
1. Pull up your saved search.
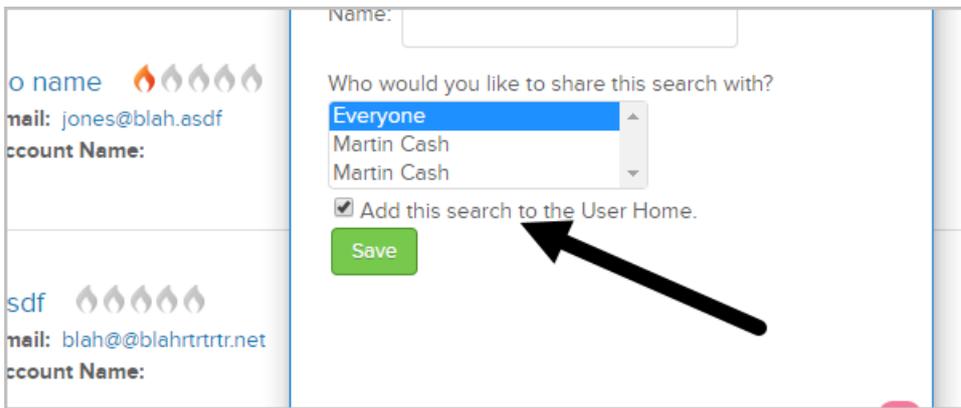2. Click on the Options button > Click on Share/Unshare
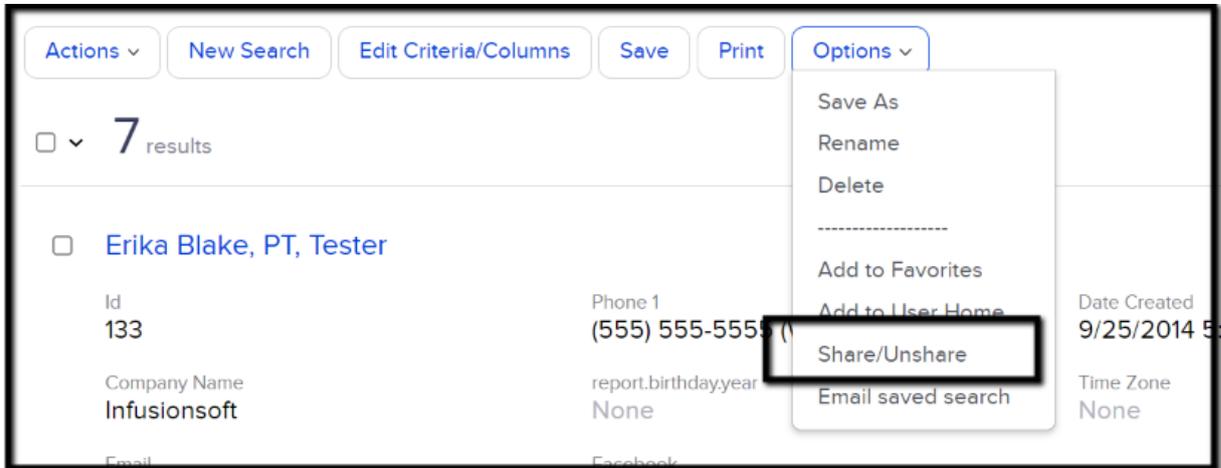
3. Click on the name(s) of the users who need to see this search
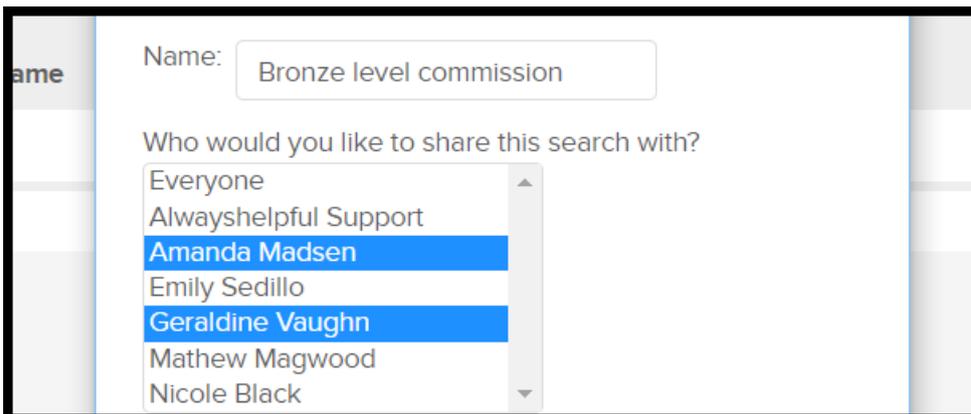
4. Click **Everyone** to share the search with all users

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**

6. Click **Save**. The saved search is now available as a drop-down whenever you go to **CRM > Contacts**
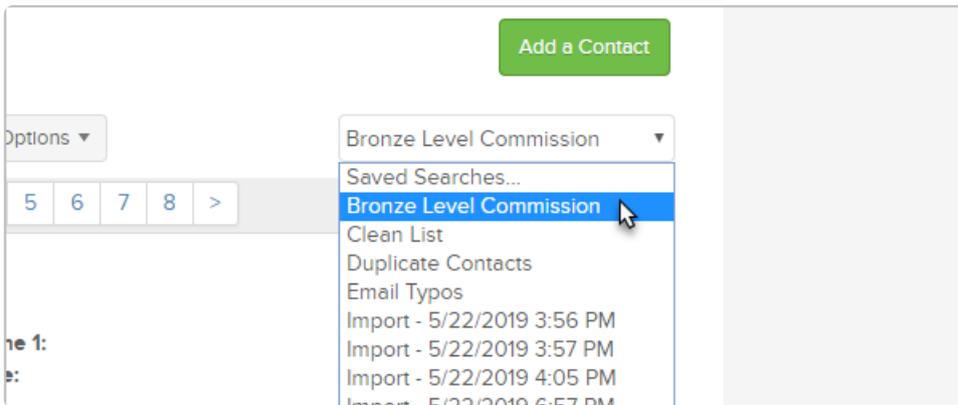
7. Your search criteria will display above the search results. Any changes to the criteria will not be saved unless you click the Save button.
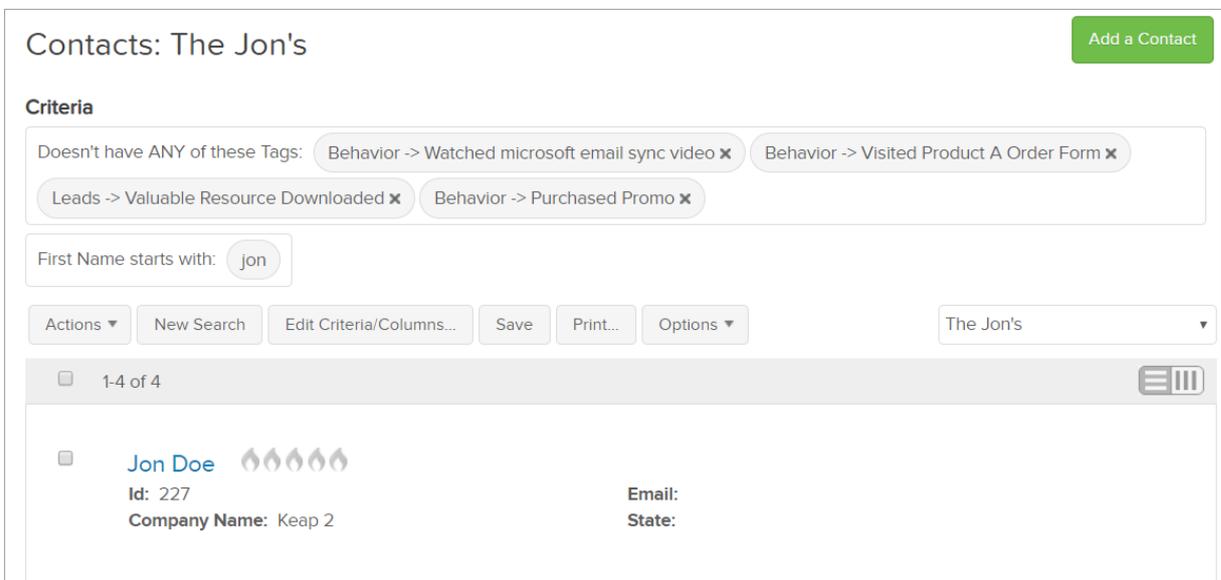
Email saved searches

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

3. Click **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


5. Click **Save** or **Save and Send Now**
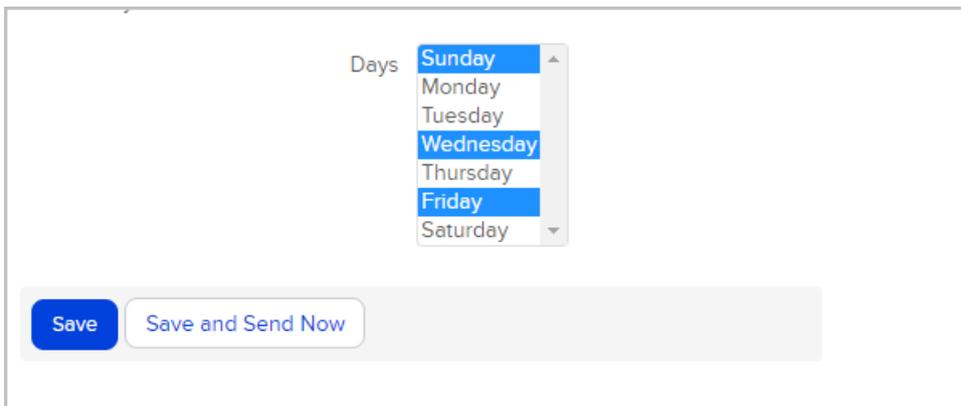
Pro Tip! Click **Options** after you save a search for additional search needs.

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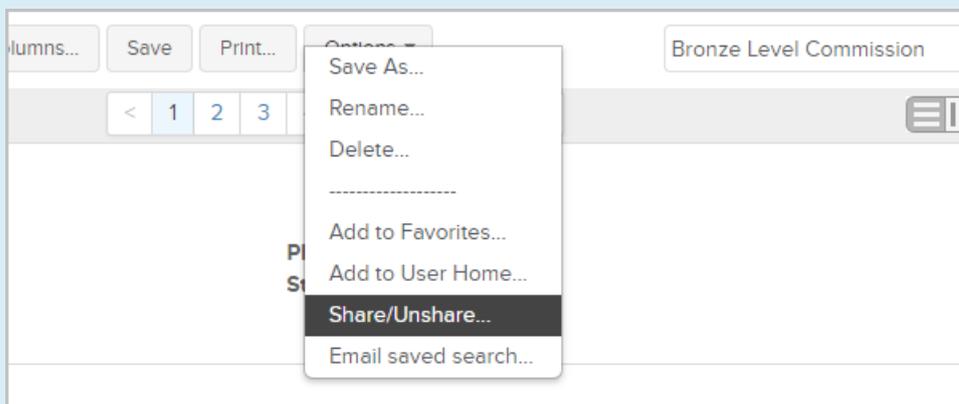
Additionally, you can use the **Edit Criteria/Columns** tab to adjust the search criteria at a later date.