# 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 recordtype (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

Contacts
Actions - New Search Edit Criteria/Columns Save Pri
<ul> <li>210 results</li> <li>Leonard Adams</li> </ul>

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

			Saved Searches	▼ Add
	Phone/Email	Custom Fields	Columns	
1		<u>à</u>		

#### 4. Click Search

Smart Lists	In ANY of these Smart Lists
	Type to search
Search	Reset Filters
Ŭ	

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.

Actio			• · - ·	
	1-2	Customize Columns on	earch Results	
		Custom Columns:		Available Fields:
		Name	~ ~ ×	ld First name Last name
		Email	<b>~ ~</b> ×	Spouse name
		Company name	<b>~ ~</b> ×	Birthday Birthday month
		Phone 1	<b>~ ~</b> ×	Birthday year Company
		State	~ ~ ×	Mobile phone

	emaii: 2soiasoia Company Name		sal.com	Sta
1	<u>eonard Ada</u> Email: nisl.elem Company Name	entum@cursus		Phc Sta
2	1	(****)	$\bowtie$	\$
			4.4	

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	
_eonard Adams	

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

e <b>AAAA</b> AA h@blah.blah	martyc.infusionsofi.com/neports/search emplate.jspfi
ame:	Save this search
• 66666	Name: Bronze Level Commission
	Who would you like to share this search with?
es@blah.asdf	Everyone A Martin Cash
ame:	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 •
	Saved Searches
5 6 7 8 >	Bronze Level Commission
	Clean List
	Duplicate Contacts
	Email Typos
	Import - 5/22/2019 3:56 PM
1e 1:	Import - 5/22/2019 3:57 PM
e:	Import - 5/22/2019 4:05 PM
	Import E/22/2010 C-E7 DM

### Share the search

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

Actions ~ New Search Edit Criteria/Colum	ns Save Print	Options ~	
$\Box \sim 7_{\text{results}}$		Save As Rename Delete	
<ul> <li>Erika Blake, PT, Tester</li> </ul>		Add to Favorites	
ld 133	Phone 1 (555) 555-555	Add to User Home	Date Created 9/25/2014 5
Company Name Infusionsoft	report.birthday.year None	Share/Unshare Email saved search	Time Zone None

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

ame	Name: Bronze level commission	
	Who would you like to share this search with?	
	Everyone	
	Alwayshelpful Support	
	Amanda Madsen	
	Emily Sedillo	
	Geraldine Vaughn	
	Mathew Magwood	
	Nicole Black	

4. Click Everyone to share the search with all users

	Share saved search
No name 🏠 🏠 🏠 🗍 Email: jones@blah.asdf	Who would you like to share 'Bronze Level Commission' with?
Account Name:	Everyone Martin Cash Martin Cash
Asdf Asd A	Share Cancel

 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

	Add a Contact
Options 🔻	Bronze Level Commission 🔹
	Saved Searches
5 6 7 8 >	Bronze Level Commission
	Clean List
	Duplicate Contacts
	Email Typos
	Import - 5/22/2019 3:56 PM
1e 1:	Import - 5/22/2019 3:57 PM
e:	Import - 5/22/2019 4:05 PM
[	Import E/22/2010 6-E7 DM

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 micros	oft email sync video 🗙 🛛 Behavior	-> Visited Product A Order Form <b>x</b>
Leads -> Valuable Resource Downloaded X Behavior -> Put	rchased Promo 🗙	
First Name starts with: Jon		
Actions   New Search Edit Criteria/Columns Save	Print Options 🔻	The Jon's
□ 1-4 of 4		
Jon Doe 00000 Id: 227 Company Name: Keap 2	Email: 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/Col	umns Save Print	Options
Title	User	Creator	Completed
Web Form details	Chris Thoma	as	11-21-11

3. Click Email saved search

ria/Columns Save Print	Options ~		Chris C	Call activity
	Save As			
	Rename			50
	Delete			
Creator		Action type	Contact	
Thomas	Add to Favorites			
inomas	Add to User Home			
Thomas	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 manually exporting the list.	n email. For larger lists, we recommend
Information	
Subject	Weekly follow up leads
Notify	michael.indrelunas@keap.com
Only Send When Results Found	Yes 🔿 No 💿
Days	Sunday Monday Tuesday

5. Click Save or Save and Send Now

Day	<sub>/S</sub> Sunday
-	Monday
	Tuesday
	Wednesday
	Thursday
	Friday
	Saturday 👻
Save 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

lumns Save Print	Save As	Bronze Level Commission
< 1 2 3	Rename	E
	Delete	
Р	Add to Favorites	
St	Add to User Home	
	Share/Unshare	
	Email saved search	

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