

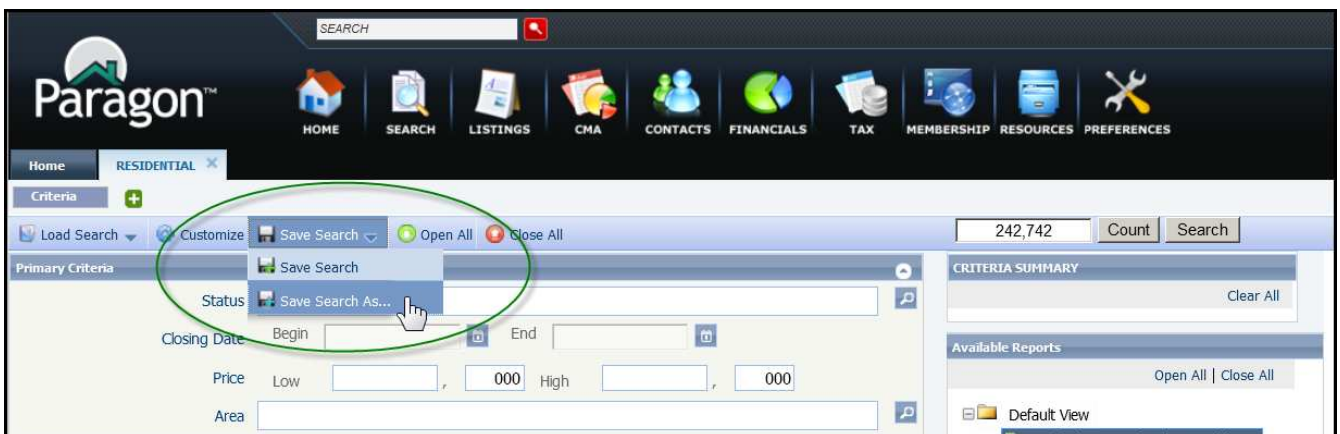
Saving Searches

Saving a search template allows you to use an already customized search template again and again. It can be further customized and renamed for other uses. When saving a search template you can give it any unique name you want.

When you have a search template with the desired fields in the desired criteria containers with or without values in the fields, you can save the template by hovering over **Save Search**. (Fig. 1)

This will save a search template, a search template with criteria in some fields, and save a specific search for a customer. When you save a search for a customer and associate or tie that search to that customer in the Contact Manager, it starts the auto – search process. You can also save a search to a customer in the Contact Manager module.

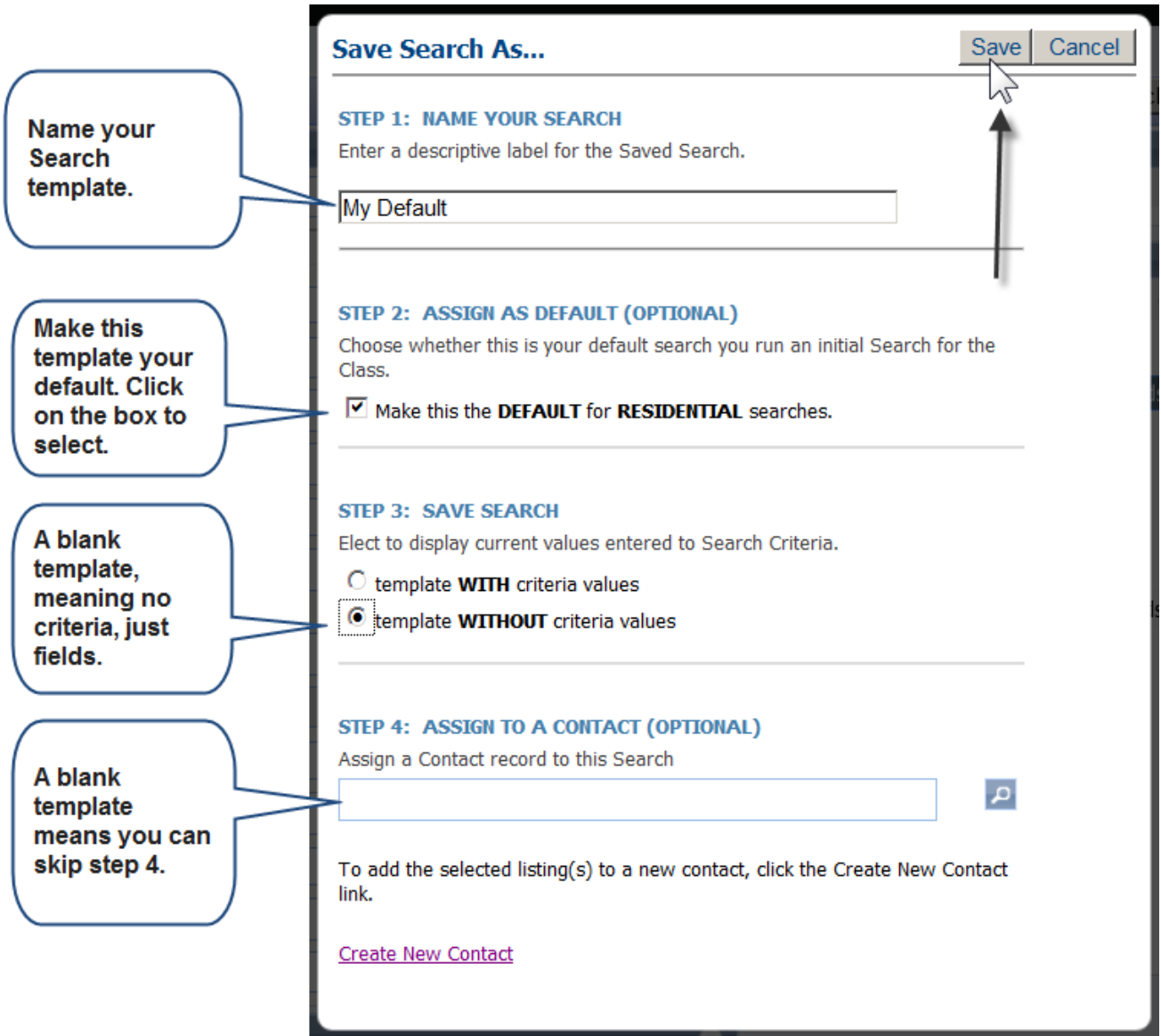
Save Search allows you to update an existing search template with new fields and/or data. **Save Search As** allows you to give a new template or search a name.



(Fig. 1)

On the next page is the modal window with the steps to saving searches. (Fig. 2)

These steps are to save a new search template as your default template.




Save Search As... Save Cancel

STEP 1: NAME YOUR SEARCH
Enter a descriptive label for the Saved Search.
My Default

STEP 2: ASSIGN AS DEFAULT (OPTIONAL)
Choose whether this is your default search you run an initial Search for the Class.
 Make this the **DEFAULT** for **RESIDENTIAL** searches.

STEP 3: SAVE SEARCH
Elect to display current values entered to Search Criteria.
 template **WITH** criteria values
 template **WITHOUT** criteria values

STEP 4: ASSIGN TO A CONTACT (OPTIONAL)
Assign a Contact record to this Search
 

To add the selected listing(s) to a new contact, click the Create New Contact link.
[Create New Contact](#)

Callouts:

- Name your Search template.
- Make this template your default. Click on the box to select.
- A blank template, meaning no criteria, just fields.
- A blank template means you can skip step 4.

(Fig. 2)

If you were to save a search with criteria for a customer, step #1 still name your search, #2 do not do step, step 3 would be template **WITH** criteria values and then in step 4 assign this search to a customer to start the auto – search process.