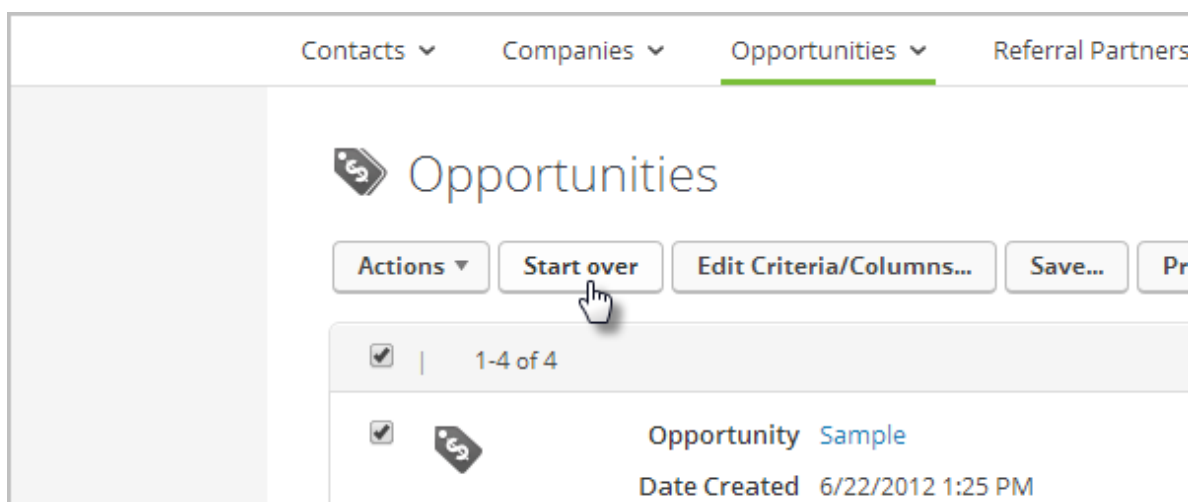


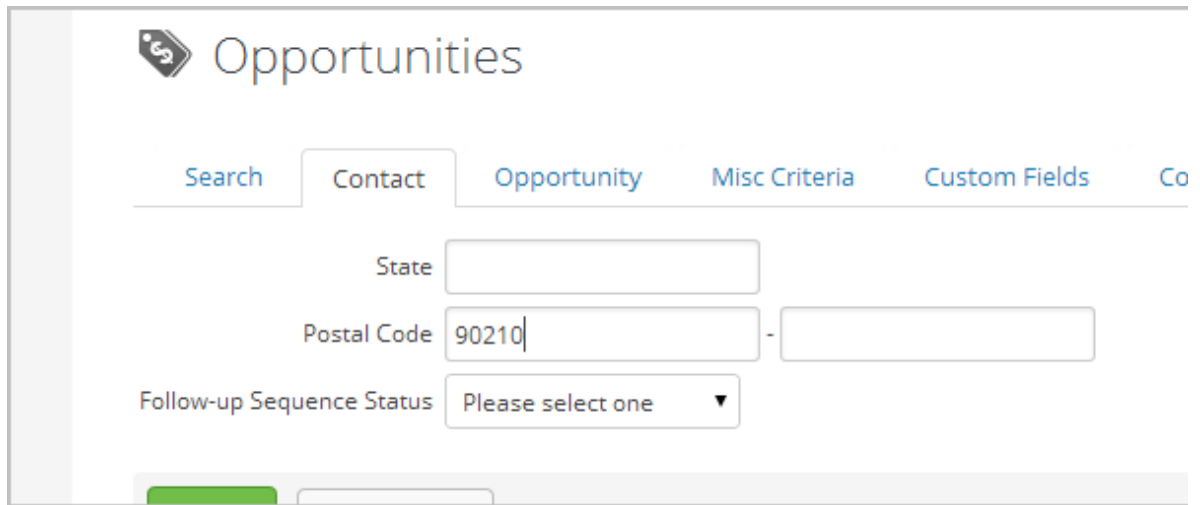
Searching Opportunity Records🔍

You can create and save one or more opportunity searches that will help you easily view and manage your opportunities. These searches can be added to your user home page using the Lil Box o' Stats and Saved Search widgets. When you create a saved search, you save a set of criteria that determine which opportunity records show up in the search results. The actual opportunities listed in the results will change automatically as the information in opportunity records change (i.e. stage, next action date, etc.). You are creating a dynamic list of opportunities.

1. Go to **CRM > Opportunities** in the main navigation menu.
2. Click on the **Star Over** button to clear previous search criteria.

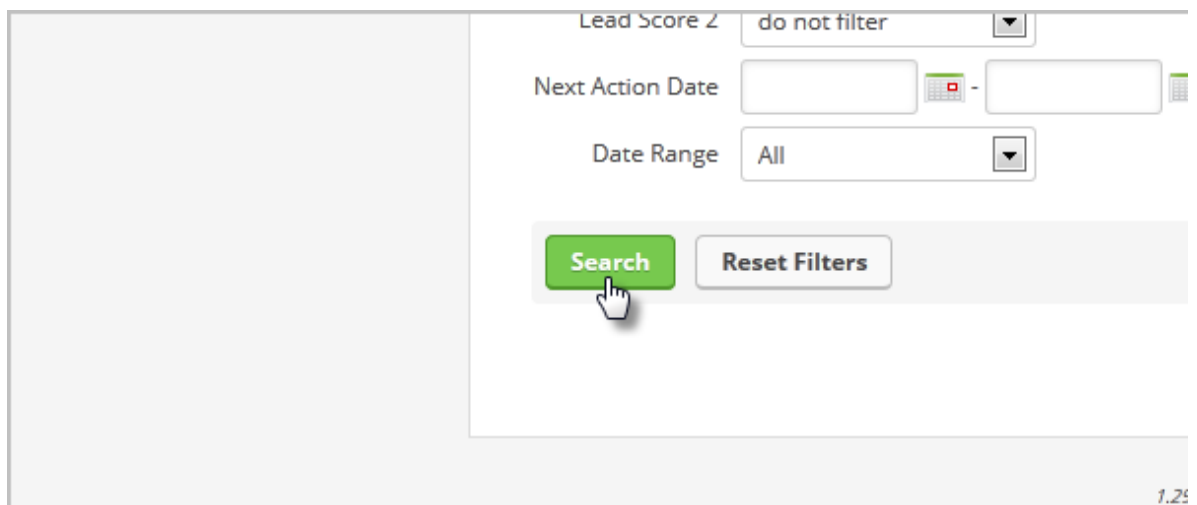


3. Enter the opportunity search criteria from one or more of the tabs to produce a specific opportunity list.
(e.g. opportunities with next actions that are past due or due today.)



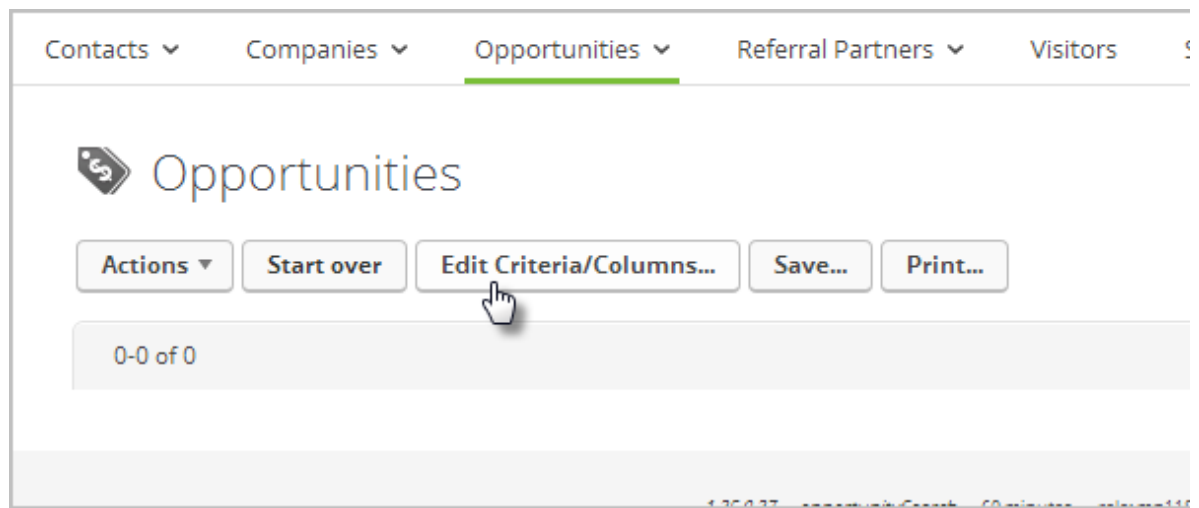
The screenshot shows the 'Opportunities' search interface. At the top, there is a header with a tag icon and the word 'Opportunities'. Below this is a tabbed interface with six tabs: 'Search', 'Contact', 'Opportunity', 'Misc Criteria', 'Custom Fields', and 'Co'. The 'Search' tab is currently selected. Under the 'Search' tab, there are three search criteria: 'State' with an empty text box, 'Postal Code' with a text box containing '90210' and a hyphen followed by another empty text box, and 'Follow-up Sequence Status' with a dropdown menu showing 'Please select one'.

4. Click on the **Search** button at the bottom and verify that the results meet your expectations.

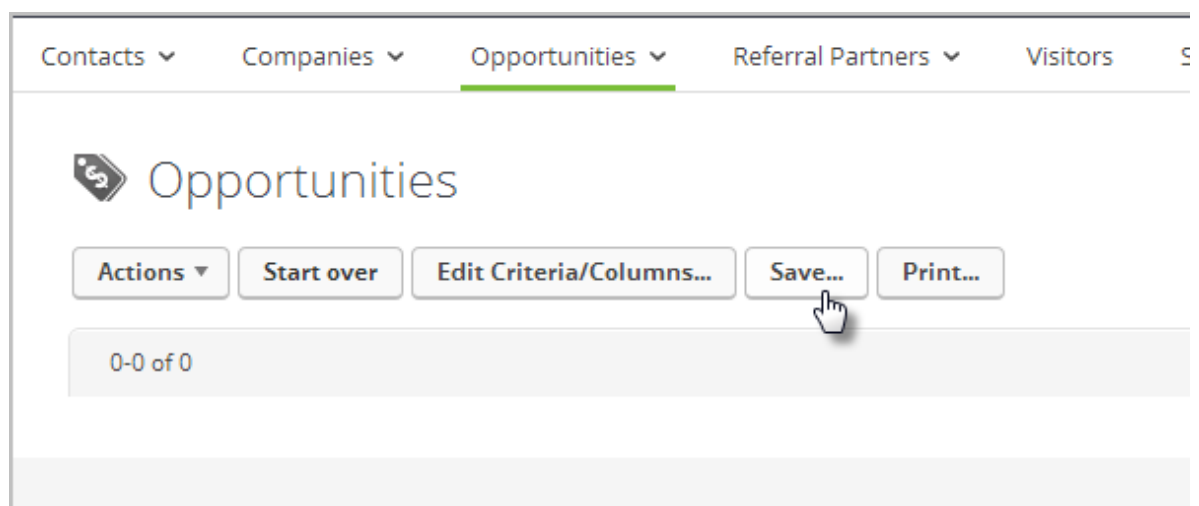


The screenshot shows the search filters and buttons. On the right side, there are three filter criteria: 'Lead Score 2' with a dropdown menu showing 'do not filter', 'Next Action Date' with two date pickers separated by a hyphen, and 'Date Range' with a dropdown menu showing 'All'. Below these filters are two buttons: a green 'Search' button and a white 'Reset Filters' button. A mouse cursor is pointing at the 'Search' button. The bottom right corner of the interface shows the text '1.25'.

5. (Optional) Click on the **Edit Criteria/Columns...** button to adjust the search criteria or to add and remove columns from the search results.



6. Click **Ok** to apply the changes.
7. Click on the **Save** button to name and save the dynamic list for quick access in the future.



The opportunities in the list will update automatically. You are saving the criteria, not a specific list.

Save this search

Name:

Who would you like to share this search with?

- Everyone
- Colton Leavitt
- Eli
- John Jigglybob
- Katie Webb
- Martin Cash**
- Mike Bast

- **Name:** Enter a short, descriptive name for the search. This name will display in custom dropdown menus.
- **Share the Search:** Click on the name(s) of users who need to see this search. Click on Everyone to share the search with all users. Note: Hold down the CTRL key on your keyboard to select more than one user from the list.
- (Optional) Mark the **Add this search to the user home** checkbox if you want to add a saved search widget to your home page. The saved search widget will display the first 20 opportunities in the list, and a link to view the entire list of people.

8. Click on the **Save** button to save your search.

Save this search

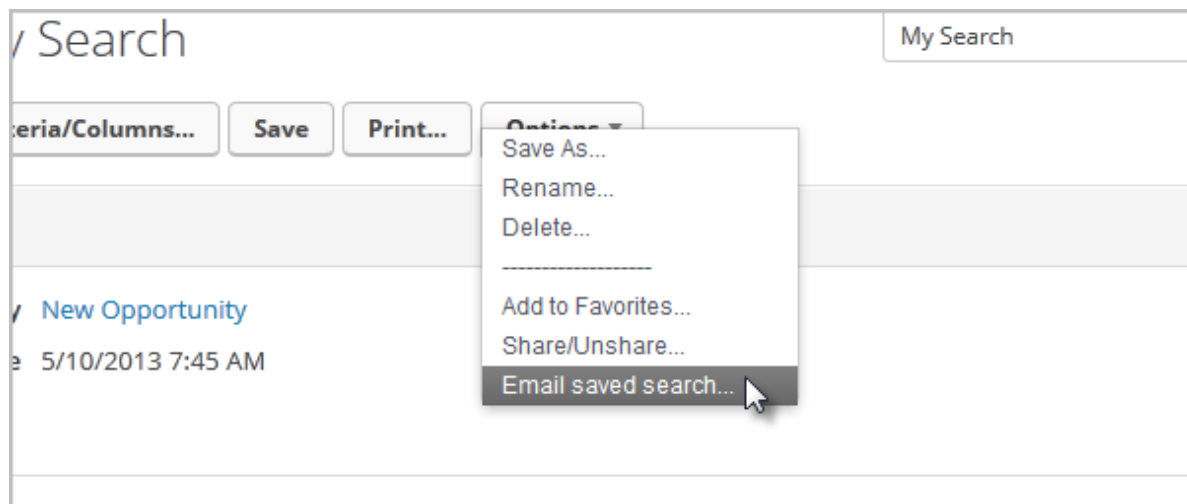
Mike Bast
Plia
Roy
Samuel
Samuel not admin

☒ Add this search to the User Home.

Save

1.29.3.6 opportunitySearch 60 minutes role: pmna4.web

9. Click the **Options** button when you are viewing a saved search to modify it, add it to your user home, share it, or create an automated email report.



Pro Tip!

The saved opportunity search is now available as an option on the saved search drop-down on the **CRM > Opportunities** screen.

