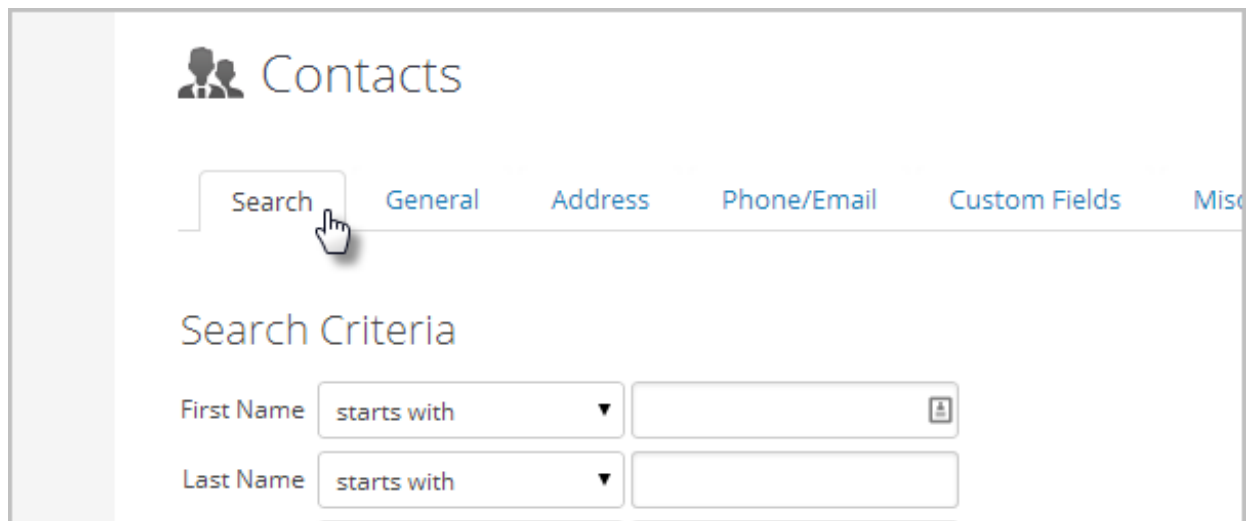


Advanced search techniques🔑

Search Tab

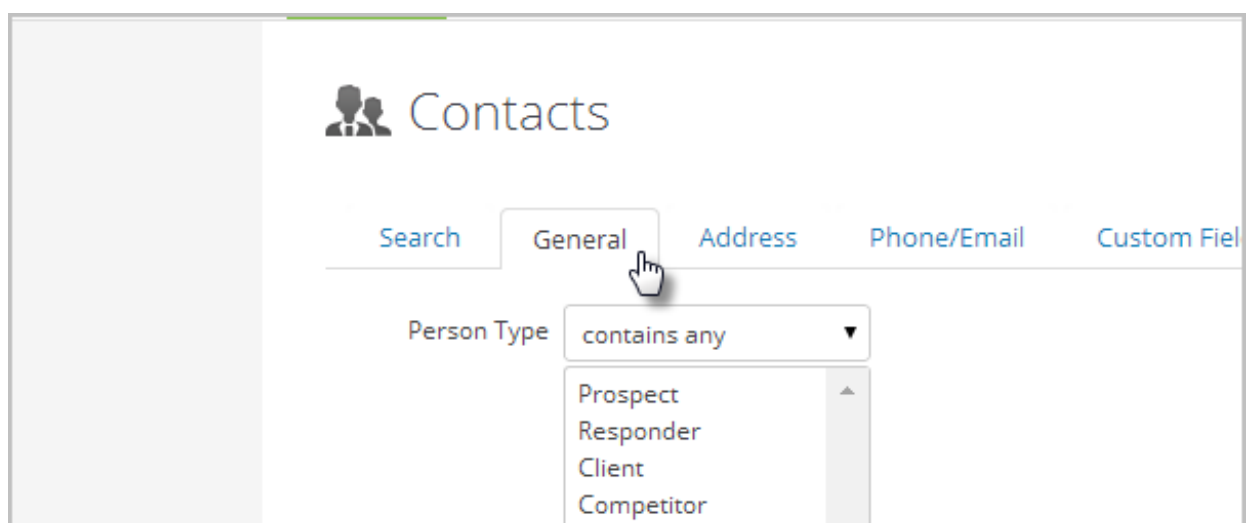


The screenshot shows the 'Contacts' interface with the 'Search' tab selected. The 'Search Criteria' section contains two rows: 'First Name' and 'Last Name'. Each row has a dropdown menu set to 'starts with' and an adjacent text input field. A hand cursor is pointing at the 'Search' tab.

In this tab you can search by basic contact information. For example, you could search for everyone that has a Yahoo email address by choosing Email "ends with" @yahoo.com.

Search by tags: Select a tag or multiple tags to pull up all contacts that have the tag. The second tags box labeled, "Tags 2" allows you to craft more sophisticated searches. For example, you could pull up everyone that has a newsletter tag but does not have a customer tag. It is recommended to watch to review the article and video [How to Use Tags to Segment Your List](#)

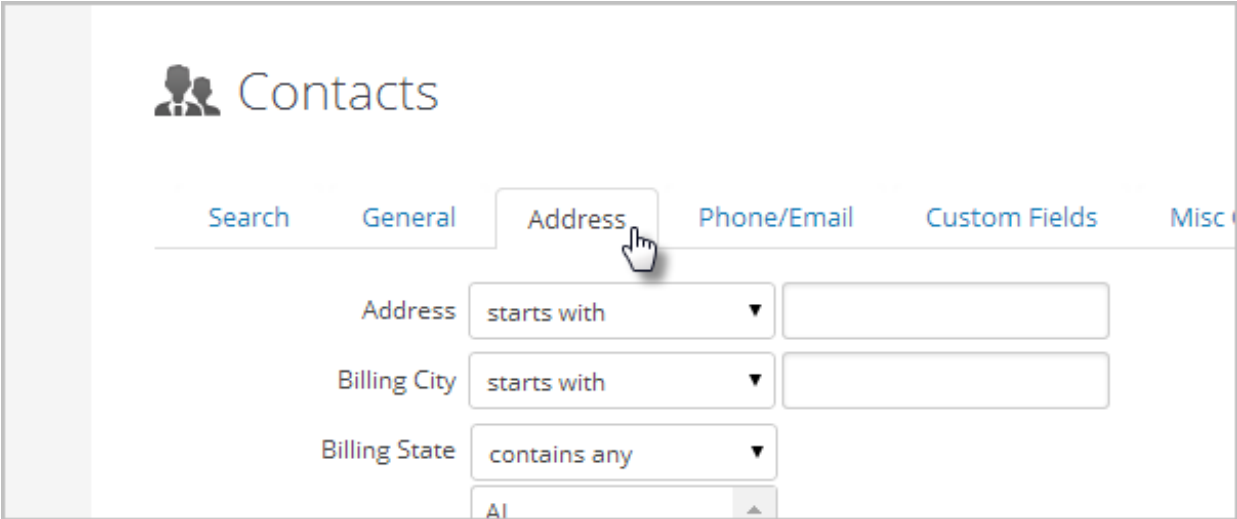
General Tab



The screenshot shows the 'Contacts' interface with the 'General' tab selected. The 'Person Type' dropdown menu is open, displaying a list of options: Prospect, Responder, Client, and Competitor. A hand cursor is pointing at the 'General' tab.

This section allows you to search on general contact information. For example, If you've collected a birthday or anniversary date, you can search for all contacts who's birthday falls within the current month and send them a card.

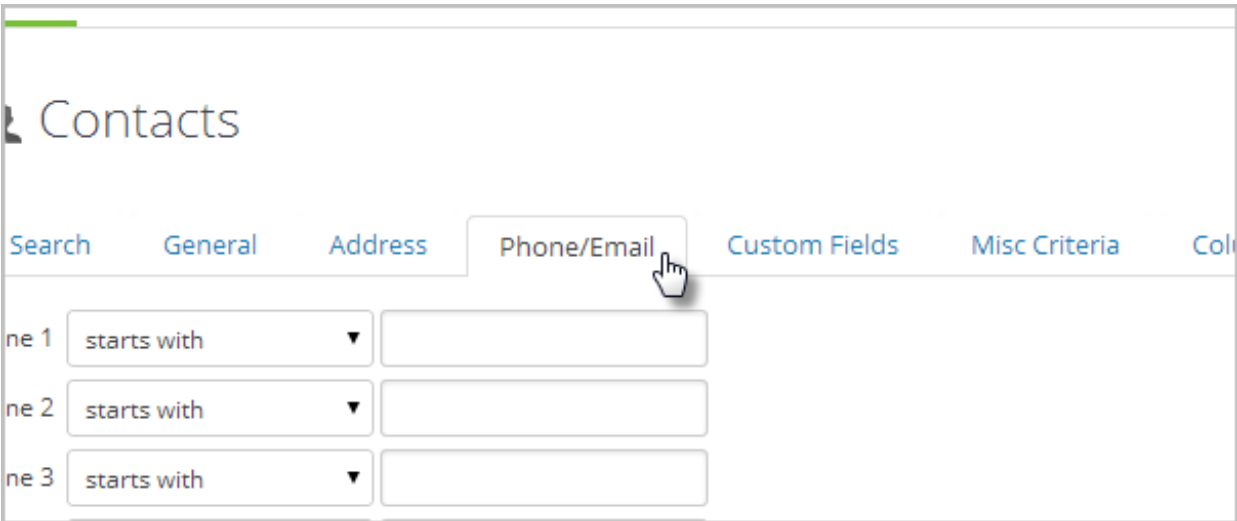
Address Tab



The screenshot shows the 'Contacts' application interface with the 'Address' tab selected. The tab bar includes 'Search', 'General', 'Address', 'Phone/Email', 'Custom Fields', and 'Misc'. Below the tabs, there are three search criteria: 'Address' with a dropdown set to 'starts with' and an empty text input; 'Billing City' with a dropdown set to 'starts with' and an empty text input; and 'Billing State' with a dropdown set to 'contains any' and a list box showing 'AI'.

This section allows you to search on the billing, shipping and optional addresses found in the contact record. For example, you could search for all contacts that live in your state to promote a regional event.

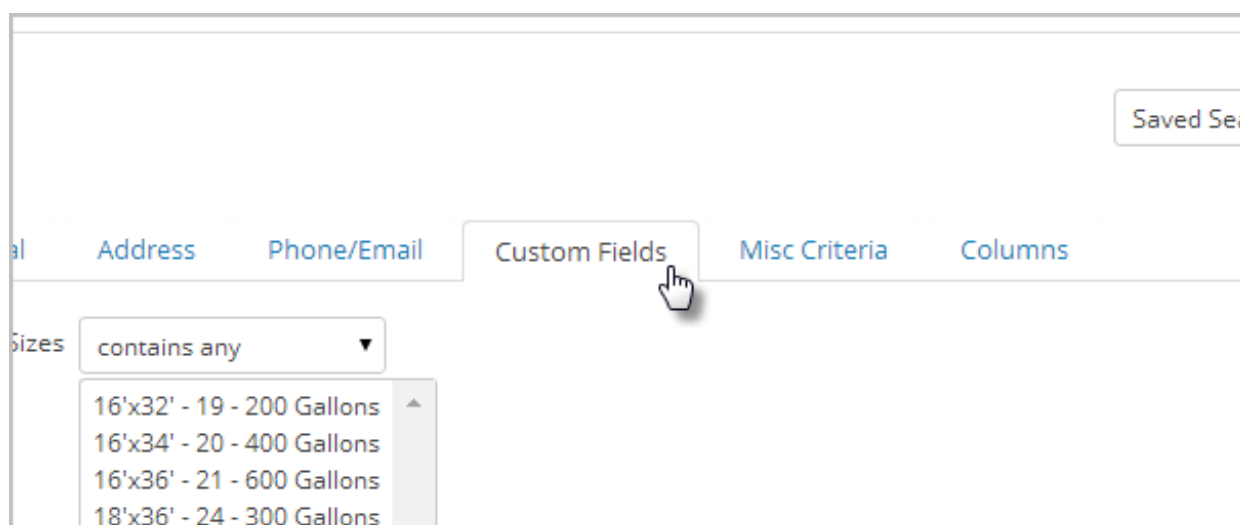
Phone/Email Tab



The screenshot shows the 'Contacts' application interface with the 'Phone/Email' tab selected. The tab bar includes 'Search', 'General', 'Address', 'Phone/Email', 'Custom Fields', 'Misc Criteria', and 'Col'. Below the tabs, there are three search criteria labeled 'Phone 1', 'Phone 2', and 'Phone 3', each with a dropdown set to 'starts with' and an empty text input.

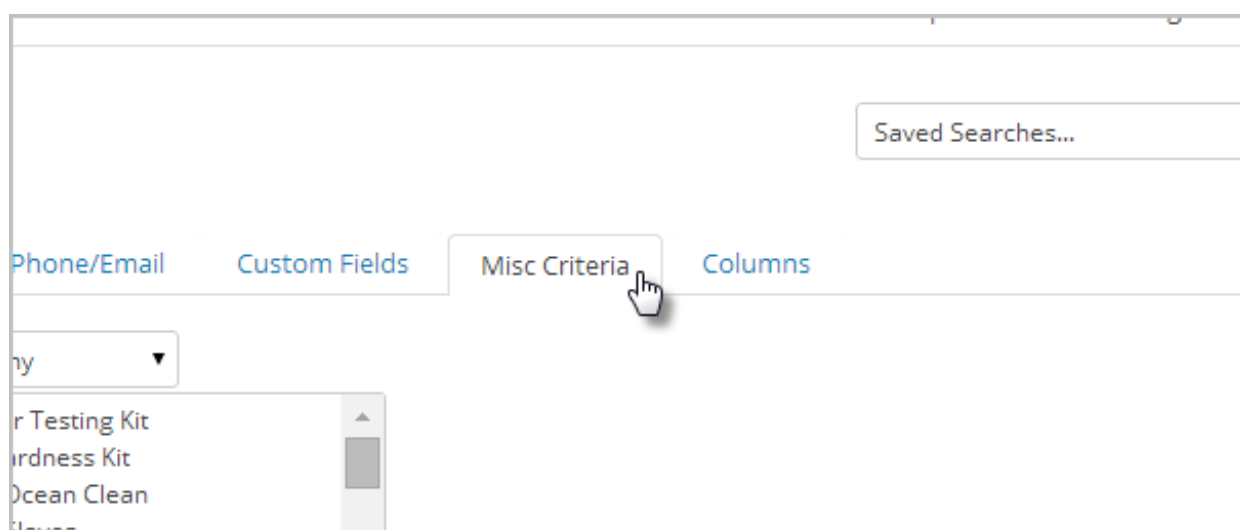
The phone options allow you to search for contacts based on an area code or entire phone number. The email options on this tab are the secondary email addresses found on the contact record. To search on the main email address, click over to the **Search** tab.

Custom Fields Tab



This tab will show you any custom fields that you have created in Infusionsoft and allow you to search on this criteria. The above example shows a simple drop-down menu that was added to denote the gender of a contact record.

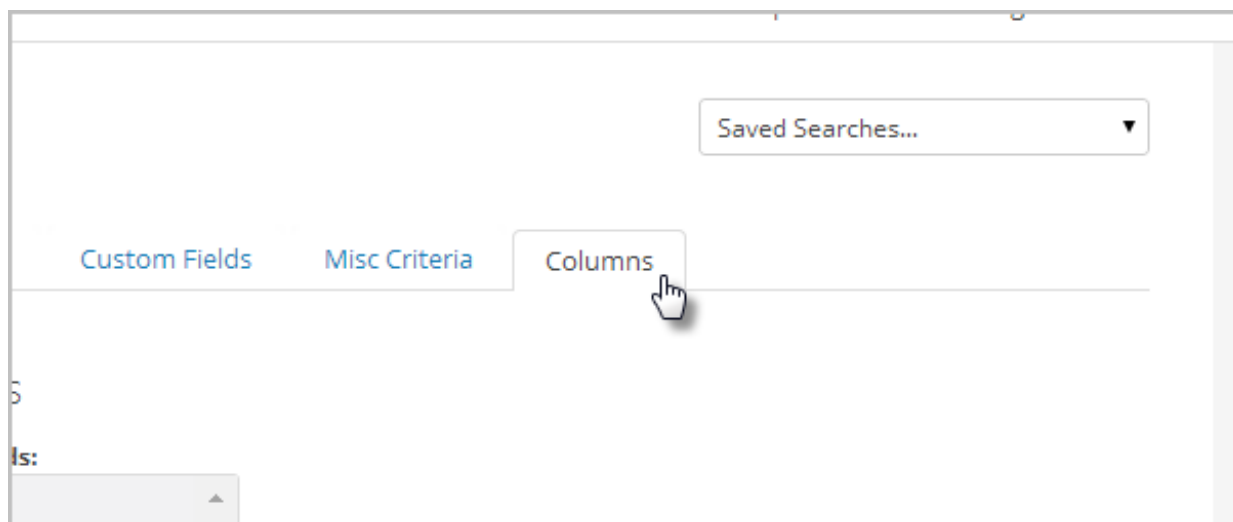
Misc Criteria Tab



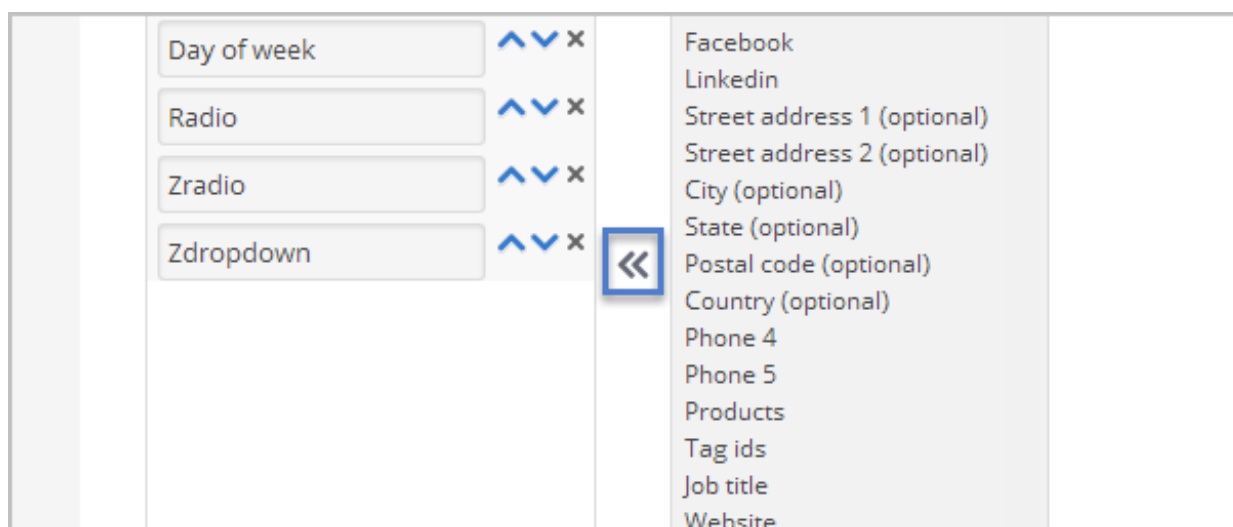
This often overlooked tab contains some very powerful search criteria such as products purchased, lead source, date created (when the contact was created in the system), and the Data Exists option.

Pro Tip! The "Data exists" option allows you to segment contacts who have values in certain contact fields. For example, you could view all contacts that have an email address. Another popular criteria is the Owner ID which is the Infusionsoft user assigned to that record.

Columns Tab



The columns tab allows you to edit the presentation of the search results. The fields on the left represent the current columns that will be displayed in your search results. To add more columns, select the column(s) on the right and click the double-arrow button to move them over to the left side of the page.



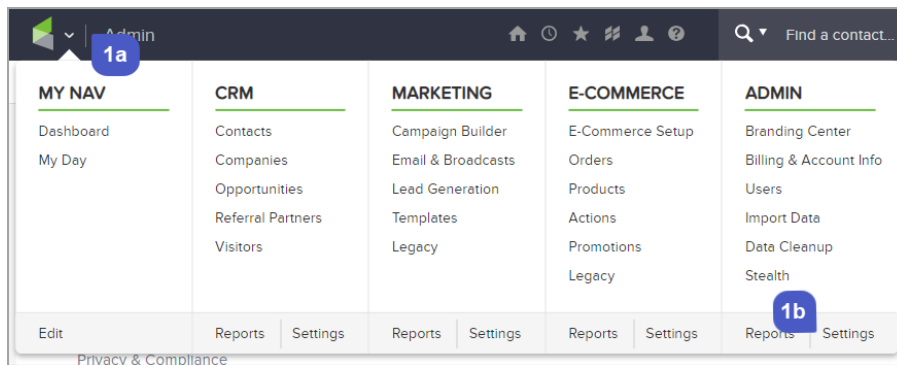
Preserve search results

By default, once you have input your search criteria and have the results, if you navigate away from the search results, it will clear out the search.

If you enable "**Maintain latest search used**", then when you return, the search preserves the previous search criteria and displays the list of contacts.

To enable this feature go to:

1. Admin > Settings



2. This automatically lands you on the "General" tab. Scroll down to "Navigation"
3. From the "Search Behavior" drop down select "Maintain latest search used"
4. Click "Save"

