# Saved search 🔗

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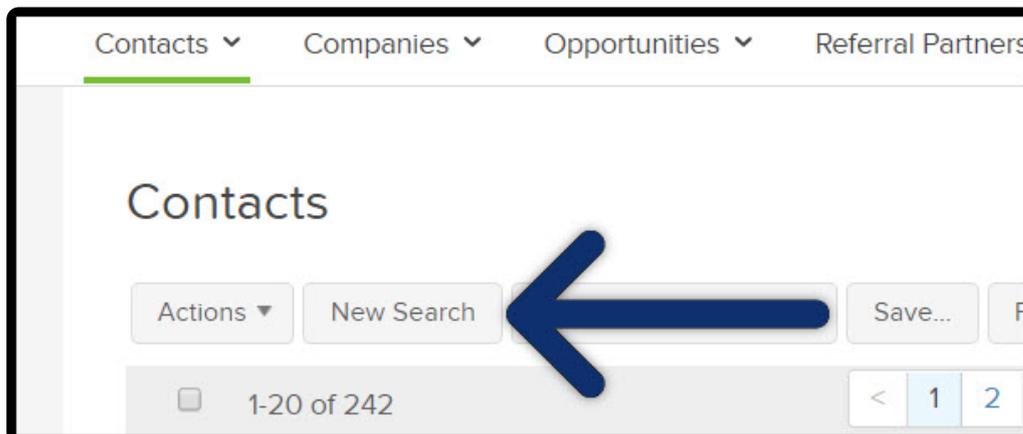
The following example is based on a contact search, but you are able to create a saved search from any record-type (Contacts, Companies, Referral Partners, Opportunities, Orders) in Infusionsoft.
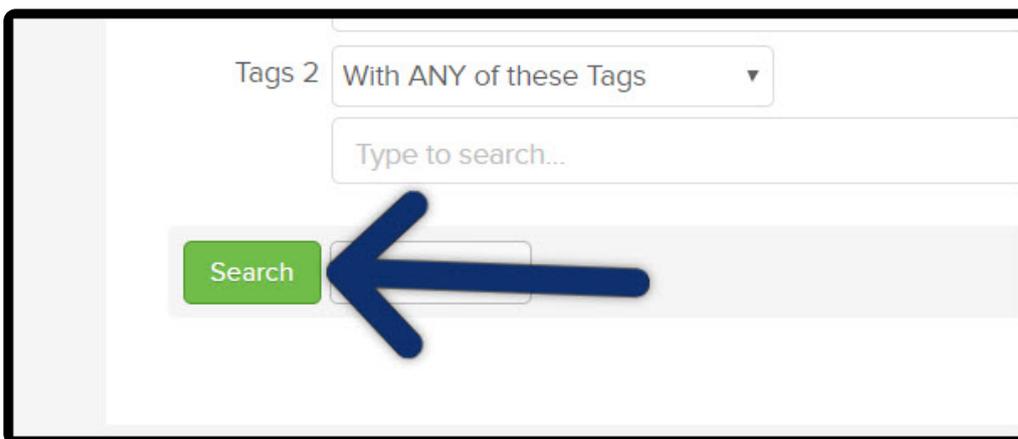
Search contacts

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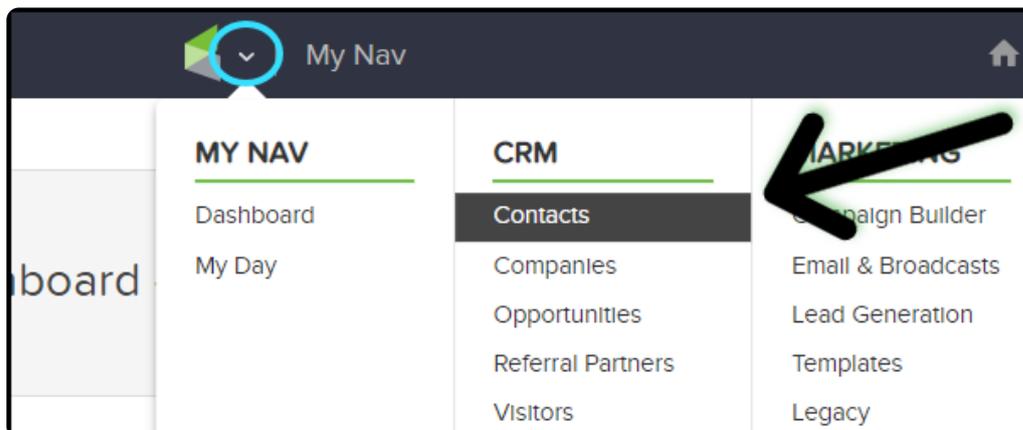
2. Click "**New Search**" to clear any previous search results

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

Example of a tab you can use to add search criteria

4. Click "**Search**"

Important! Make sure that you include the "Name" column on the report. Only the "Name" field can be clicked to open the contact record. Here is how you can add the Name column to the report if it is not already available. Note that the "Name" column is different that "First Name" and "Last Name" which cannot be clicked on to open the contact record.
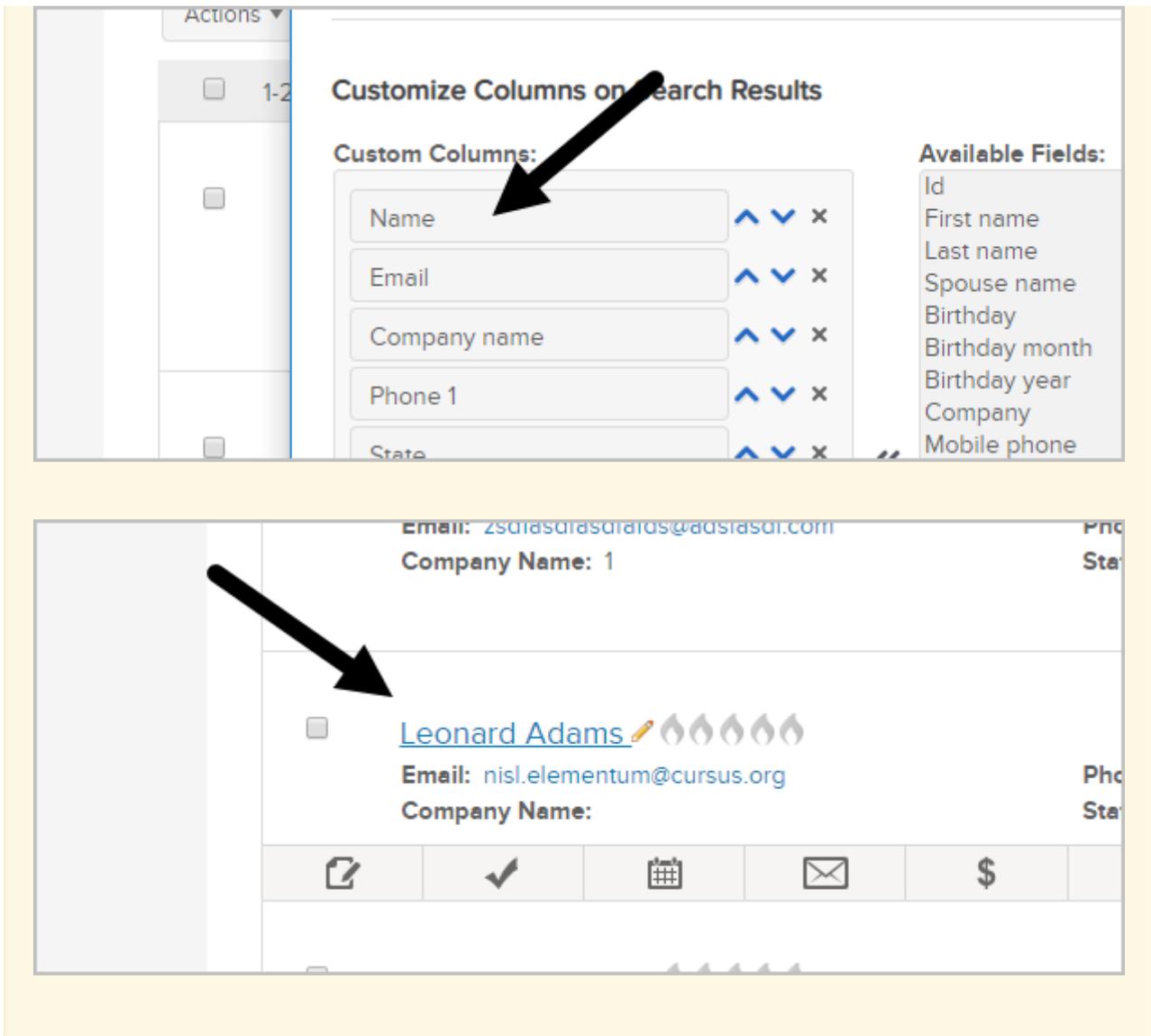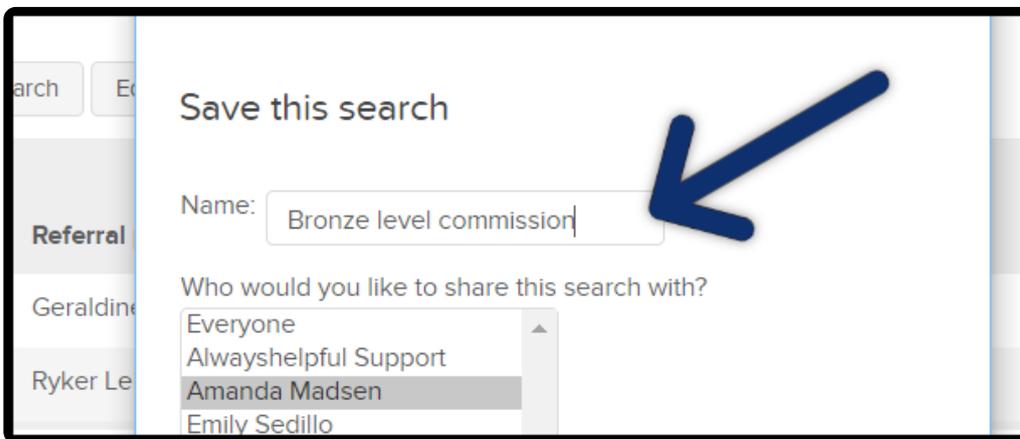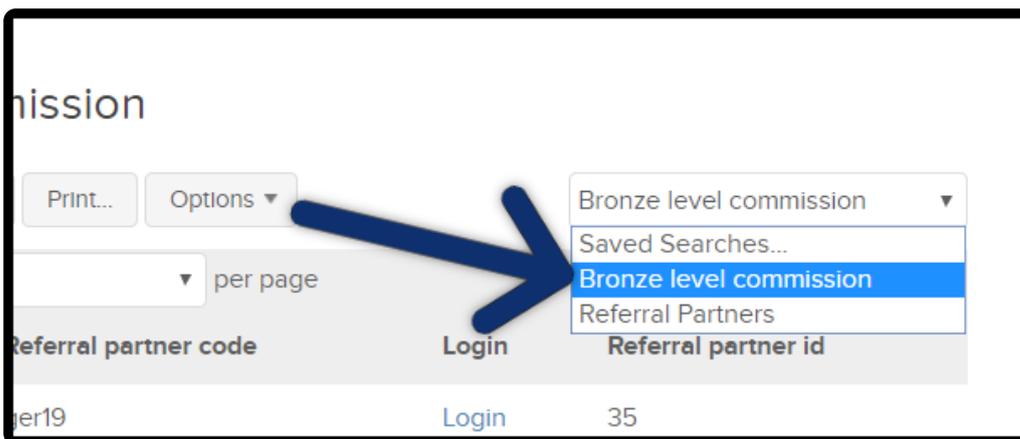
Save search

1. 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.
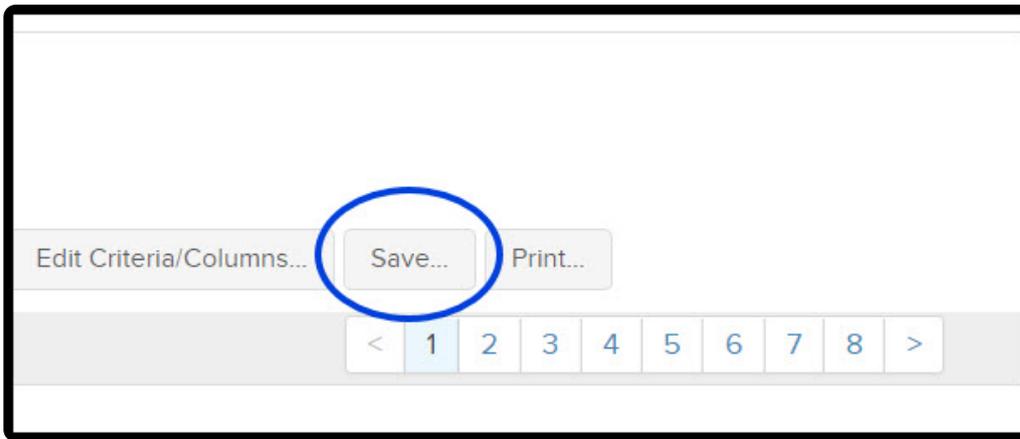
2. **Name:** Enter a short, descriptive name for the search

This name will display in custom drop-down menus

Share the search

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

2. Click "**Everyone**" to share the search with all users

3. **"Mark 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**
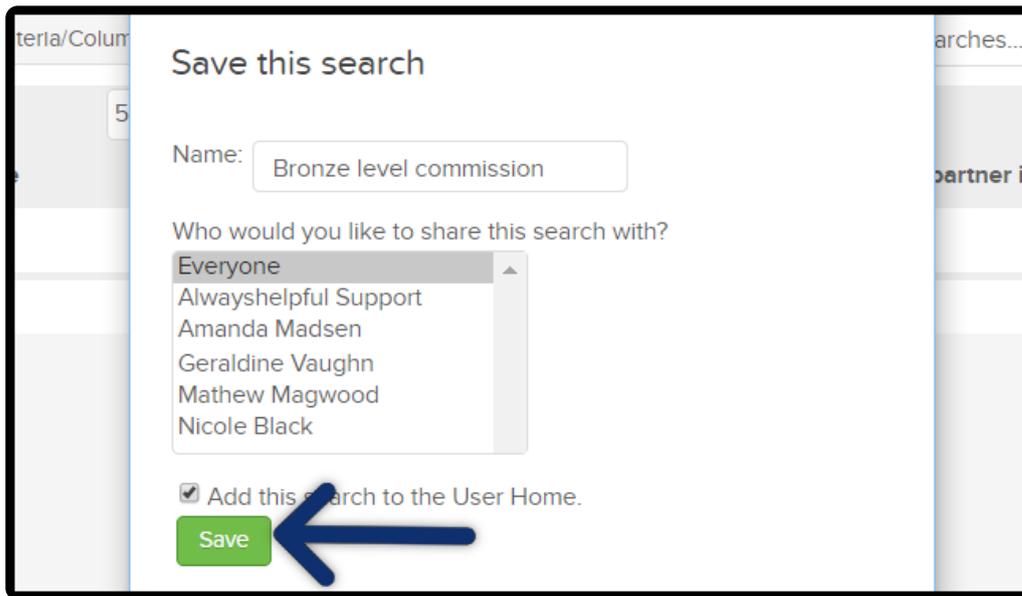
4. Click **Save**

The saved search is now available as a drop-down whenever you go to **CRM > Contacts**
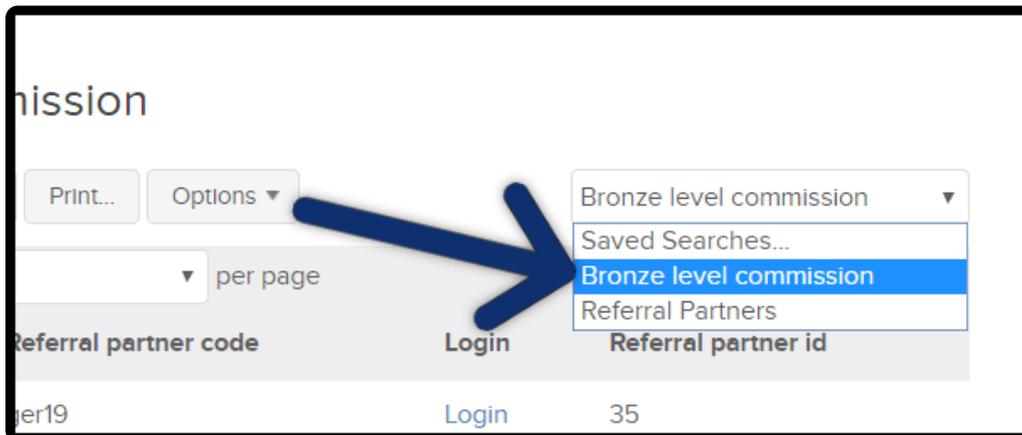
5. Click the contact's name to open the contact record

Pro Tip! Click "**Options**" after you save a search to modify.

- **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