Adding Search Fields and Saving Searches

After you have selected a search type and template, you may decide that the query requires more fields than currently displayed. You can add additional search criteria fields to the template.

To add more search criteria fields:

1. From the Search Criteria page, click the **Add Fields** button in the footer bar; or click [⊞] to expand the **Additional Fields** category in the sidebar.

   The **Additional Fields** section expands.

2. Click the **Category** drop-down list and choose the category of new search criterion you want to add.

   The list displays all fields within the selected category.

3. To quickly find a field name, type full or partial information in the **Search for field** box.

4. Highlight the field you want to add to the search form, then click the **Add to Search** button.

   The new field is appended to the bottom of the Search Form.

Saving a Search

Once you have added search criteria to define a property type search, you can save the search settings to the currently defined search; or save the settings as a new custom search.

To save search settings:

1. From the Search Criteria page, after you have entered your search criteria, click the **Save Search** button.

   The Search Settings page opens.

2. Select one of the following options:

   - **Save changes to current search —** accept the current **Search Name** and **Search Description** or type new ones. You cannot change the **Search Type**.
   - **Save as a new search —** type a **Search Name**, **Search Description** and click the **Search Type** drop-down list to choose a different template, for example **Custom Search Only**.

3. Click the **Save** Action button.

   You are returned to the Search Criteria page of the saved search. The search also appears on the Search Manager page. See Working with the Search Manager.

Working with the Search Manager

The Search Manager lets you easily manage the different kinds of searches you have set up (All Property Types, Member, Contact record, etc.) and filter them by their source (System, Office, Personal saved searches, etc.). You can also search for and re-use a favorite search.

To access and use the Search Manager:

1. From the main menu, click **Search > Search Manager**.

The Search Manager page opens.

2. To sort the list of searches in ascending or descending order, click the column heading. See *"Viewing, Sorting and Filtering" on page 20*.

3. Click one of the drop-down lists to filter by:
   - **Search Type** — All, Member, All Property Types, History, Contact record etc.
   - **Source** — All, My Searches, Office, Firm, MLS or System.
   - **Prospect** — All, Prospect Searches or Non Prospect Searches.

4. To find a particular search, enter the name in full or in part, into the **Search by search name** field, then click **Search**.

- click the **Show All** button to display all searches.

5. To load a specific search, click the search name (blue hyperlink) in the list.

   note! *You can also select the search then click the Open Search action button.*

6. To perform a new search, click the **New Search** button.

   A blank Search Criteria page open. See ***Error! Reference source not found.***.

7. Select one search record, then click an Action button to perform more tasks:
   - **Copy Search** — takes you to the Search Settings page, where you can create a copy of the selected search so that you can modify and reuse it. See Saving a Search.
   - **Rename Search** — takes you to the Search Settings page, where you can rename an existing search. See Saving a Search.

8. To delete one or more saved searches, select the unwanted items then click **Delete Selected Searches** in the footer bar.

   note! *To print the actual property record details, select Print from the Search Results page. See "Printing Listing Search Results" on page 232.*