

Create a Saved Search in Matrix

Save search criteria so you can run the same search again. Classic and New Search use different Save screens. Follow the section that matches the search you used.

A saved search is the criteria only. To send matching listings to a Contact on a schedule, see Create an Auto Email in Matrix.

From Classic Search

1. Complete a search in Classic Search. See Search for Listings in Matrix.
2. Select Results.
3. Select Save > New Saved Search.
4. Enter a Search Name.
5. Optional: Under Contact, select the contact, or select Create a New Contact.
6. Optional: Select Enable as Favourite Search on Home tab (10 maximum).
7. Confirm the Criteria summary.
8. Select Save.

From New Search

1. Complete a search in New Search. See Search for Listings in Matrix.
2. Select Save > New Saved Search.
3. Enter a Search Name.
4. Optional: Under Contact, search by name or email and select the contact, or select Create New Contact.
5. Optional: Turn on Add as a favorite search on Home.
6. Confirm the Criteria summary.
7. Select Save.

Manage an existing Saved Search

Open My Matrix > Saved Searches to run, change, or delete one.

Tips

- Classic opens Saved Search from the Save tab on Results. New Search opens it from Save on the results toolbar.

- Classic spelling is Favourite. New Search spelling is favorite.
- Classic Save also lists New Auto Email and New Speed Bar Shortcut. New Search Save lists only New Saved Search. Auto Email in New Search is under Send.

Source: <https://support.itsosystems.ca/kb/124>