Editing Saved Searches

Like most things in Paragon, there are multiple ways to edit your Saved Searches. We will cover 2 of the most common methods.

Method 1 – Saved Searches that may or may not be connected to contacts

1) Click on Search > Saved Property Searches

| HOME SEARCH LISTING | SS CMA CONTACTS FINANCIALS | TAX MEMBERSHIP RESOURCES PREFERENCES |
|-----------------------|----------------------------|--------------------------------------|
| SEARCH BY CLASS | SPECIALTY SEARCH | SAVED SEARCH |
| Residential | Mapping | Saved Property Searches |
| Lots & Land | Hotsheet | Listing Carts |
| AVED QUICK Commercial | Auto Hotsheet-7/17/1 | 9 3:32 PM |
| Rental Income | Property History | |
| For Rent | Inventory | |
| Multi-Class | Tour and Open House | |
| l display | Address Archive | |
| | The Real Estate Technology | Adbotty |

2) Click on the name of the *Saved Search* to be edited.

| L | Residential | new area 0 | N | 0 |
|---|---------------|-------------------------------|-----|---|
| C | Rental Income | Rental ome | MLS | 0 |
| | Residential | Reside | MLS | 0 |
| C | Residential | Save Search For Bing Crosby | N | 0 |
| | Residential | test (Catering, Shaky Nate's) | N | 1 |

3) The *Search Criteria* screen should appear showing the current criteria.

| Home Saved Pro | perty Searches | Residential | | | | | | | | | |
|---------------------------|----------------------------------|---|------|------|--------|---|---------|------------|-------------------|-----------------------------|------------|
| Criteria Map Search | h Run Search | + New Search | | | | | | | | | |
| 🚽 Load Search 🛛 🗍 Last | Search 🎯 Customi | ze 🔚 Save Search 🚫 Open All 😧 Close All | | | | | | 11 | Count | Search | |
| Primary Criteria - Save S | earch For Bing Cros | by | | _ | | • | CRITER | IA SUMMARY | | | |
| Price | Price Low 190, 000 High 225, 000 | | | | | | | | | Cle | ar All |
| Status | ACT× ANS× C | TG× CTGH× CTGI× BOM× NEW× PCH× | EXT× | P | Equals | • | 🗙 💋 | Price | 190000 | - 225000 | |
| | BOMR× CTGS× | | | | | | 🛛 💋 | Status | ACT, A CTGI, E | NS, CTG, CTC BOM, NEW, P | GH, CH, |
| Sub-Type | | | | 2 | Equals | - | _ | Search By | EXT, B | JMR, CIGS | |
| Area/Grid | | | | | Equals | • | × | Мар | Shape | 1: Polygon | |
| Search By Map | Shape 1: Polygon | | | | | • | Availab | e Reports | | | |
| 71. | [| | | Cont | aine | | | | ~ | | - 41 |

4) Make any necessary changes to the search. In this example, add the *Pending-Inspection (PNDI)* status to your criteria.

| Home Saved Property Searches | Residential × | | | | | |
|--|---|------------------|--|--|--|--|
| Criteria Map Search Run Search | + New Search | | | | | |
| 🗟 Load Search 🛛 Last Search 🍥 Customiz | e 🖬 Save Search 🕐 Open All 😡 Close All | 10 | Count Search | | | |
| Primary Criteria - Save Search For Bing Cros | by 💿 | CRITERIA SUMMARY | | | | |
| Price Low | 190 , 000 High 225 , 000 | | Clear All | | | |
| Status ACT× ANS× C | TGB× BOM× NEW× PCH× EXT× BOMR× CTGS× 2 Equals - | 🔀 💋 Price | 190000 - 225000 | | | |
| PNDI× | | 🔀 💋 Status | ACT, ANS, CTGB, BOM, NEW, PCH, EXT, BOMR, CTGS, PNDI | | | |
| Sub-Type | Equals 🗸 | Search By | Shape 1: Polygon | | | |

5) Once the changes have been made, click on **Save Search** > **Save Search**.

| Home S | Saved Proper | ty Searches | Residential 💥 | | | |
|------------------|---------------|-------------------|--|------------------|-------|------------|
| Criteria M | ap Search | Run Search | + New Search | | | |
| Load Search | | | e 🚽 Save Search 🙁 Open All 😡 Close All | 11 | Count | Search |
| Primary Criteria | a - Save Sean | ch For Bing Crosl | by 🔜 Save Search | CRITERIA SUMMARY | - | |
| | Price L | .ow | Save Search As Save Search 225 , 000 | | | Cle |
| | | | | Price | 10000 | 1 - 225000 |

6) The name of the search will appear. Since the updates are to an existing search, just click **Save**.

| Save Search | Save | Cancel |
|--|------|--------|
| YOURSELF CONTACT | | |
| 1. NAME YOUR SEARCH | | |
| Save Search For Bing Crosby | | |
| 2. SAVE SEARCH O template WITH criteria values template WITHOUT criteria values | | |
| ASSIGN AS DEFAULT (OPTIONAL) | | - |
| Save this Residential search. | | |
| Make this MY DEFAULT for Residential searches. | | |

7) The Search has now been updated. Any Email Notifications or Collab Center sites will update to reflect the new search criteria for updates and new listings.

Method 2 – Saved Searches associated with contact(s)

1. Go to Contacts > View/Manage Contacts



2. Click on the name of the Contact that needs to be updated.

| 🕂 A | dd Ne | ew | 👿 Delete | 🖸 Import | 🔒 Export | 😫 Print | \rm Labe | els 🙆 G | et Homel | bot | | | |
|-----|-------|----|----------|------------|------------|---------|----------|--------------|----------|-----------|------------|------|--|
| FIN | ID | | | AC | ACTIVITY | | | STATUS TYPES | | | GROUPS | | |
| Sea | arch | | | All | | V | All | | V | All | T | All | |
| | | | Activit | har l | Namo | 6 | tatua | Email | Drime | Dhana | Matchos | Sito | |
| | | | ACTIVIT | C y | Name | 51 | tatus | Email | Prima | ary Phone | Matches | Site | |
| 1 | | + | 0 | Shaky | te's Cater | ing A | Active | | | | <u>113</u> | VIEW | |
| 2 | | + | | tt | | Д | Active | | | | 0 | | |
| 3 | | + | 0 | Bob Ba | arker | A | ctive | | | | <u>17</u> | VIEW | |

3. Click on Buyer Activity

| Home Contacts X | | | | | | | |
|------------------------|-------------------|-------------|------------|--|--|--|--|
| Contacts Barker, Bob × | | | | | | | |
| CONTACT INFORMATION | CONTACT ACTIVITY | | | | | | |
| 🖃 🚞 Dashboard | 2 View Site | 2 View Site | | | | | |
| Contact Activity | | | | | | | |
| 🕀 🚞 General | SEARCH ACTIVITY | | | | | | |
| 🕀 📷 Buyer Activity | Saved Search Name | Total | New Matche | | | | |
| 🗄 🚞 Seller Activity | 150-200k vallev | 17 | 17 | | | | |
| 🕀 🚞 Saved CMA | | | | | | | |
| 🗊 🚞 More Information | | | | | | | |

4. On the right side of the screen, click on the name of the search to be edited.

| CONTACT INFORMATION | CONTACT ACTIVITY | | | | | |
|----------------------|-------------------|-------|-----|--|--|--|
| 🗆 🚞 Dashboard | 2 View Site | | | | | |
| Contact Activity | | | | | | |
| 🗄 🚞 General | SEARCH ACTIVITY | | | | | |
| 🗈 🚞 Buyer Activity | Saved Search Name | Total | Nev | | | |
| 🗄 🚞 Seller Activity | 150-200k vallev | 17 | | | | |
| 🗄 🚞 Saved CMA | | | | | | |
| 🗉 🚞 More Information | | | | | | |

5. The Search Criteria screen should appear.

| Home Saved Pro | erty Searches Residential | | | | |
|---------------------------|---|----------|---|-------------------|--|
| Criteria Map Search | Run Search + New Search | | | | |
| 🗿 Load Search 🛛 🥼 Last | Search 🎯 Customize 🚽 Save Search 🔿 Open All 🚱 Close All | | | 11 | Count Search |
| Primary Criteria - Save S | arch For Bing Crosby | | • | CRITERIA SUMMAR | Y |
| Price | Low 190 , 000 High 225 , 000 | | | | Clear All |
| Status | ACT ANS CTG CTGH CTGI BOM NEW PCH EXT | Equals | • | 🔀 💋 Price | 190000 - 225000 |
| | BOMR* CTGS* | | | 🔀 💋 Status | ACT, ANS, CTG, CTGH, CTGI, BOM, NEW, PCH, |
| Sub-Type | | P Equals | • | Search By | EXT, BOMR, CTGS |
| Area/Grid | l | P Equals | • | Map | Shape 1: Polygon |
| Search By Map | Shape 1: Polygon× | | • | Available Reports | |
| 7:- | 50 | Containe | | | |

6. Make the necessary changes to the search. In this example, add the *Pending-Inspection (PNDI)* status to your criteria.

| Home Saved Property Searches Residential × | | | |
|--|------------------|--|--|
| Criteria Map Search Run Search + New Search | | | |
| 🗟 Load Search 🛛 Last Search 🚳 Customize 🔚 Save Search 📀 Open All 😝 Close All | 10 | Count Search | |
| Primary Criteria - Save Search For Bing Crosby 🕒 | CRITERIA SUMMARY | | |
| Price Low 190 , 000 High 225 , 000 | Clear All | | |
| Status ACT ANS CTGB BOM NEW PCH EXT BOMR CTGS 2 Equals | 🔀 💋 Price | 190000 - 225000 | |
| PNDI | 🔀 💋 Status | ACT, ANS, CTGB, BOM, NEW, PCH, EXT, BOMR, CTGS, PNDI | |
| Sub-Type | Search By Map | Shape 1: Polygon | |

7. Once the changes have been made, click on **Save Search** > **Save Search**.

| Home | Saved Pro | perty Search | ies | Residential 🗙 | | | | | | | |
|--------------|---------------------------|--------------|-----------|---------------|----------------------|---------|----|---|------------------|-------|--------|
| Criteria | Map Search | Run Sea | arch | + New Search | | | | | | | |
| 📓 Load Sear | rch 🚺 Last | Search 🌀 C | Customize | 📕 Save Search | 🔿 Open All 😡 Close A | All | | | 11 | Count | Search |
| Primary Crit | eria - Sa ve s | | ng soby | Save Search | | | | • | CRITERIA SUMMARY | | |
| | Price | Low | | 🛃 Save Search | As Save Search | 225 , 0 | 00 | | | | Cle |
| | | | | | | | | | | 10000 | |

8. A window with the Search Name will appear. Click Save.

| Save Search | Save Cancel |
|------------------|-------------|
| NAME YOUR SEARCH | |
| 150-200k valley | |
| | |
| | |
| | |

****NOTE**** This will update the search for <u>ALL</u> Contacts it is associated with. If the same search is saved to more than one person, it will automatically update for them as well. If you only want to update it for the contact you are looking at, choose Save **Search** > **Save Search** As... and enter a new name for the search.