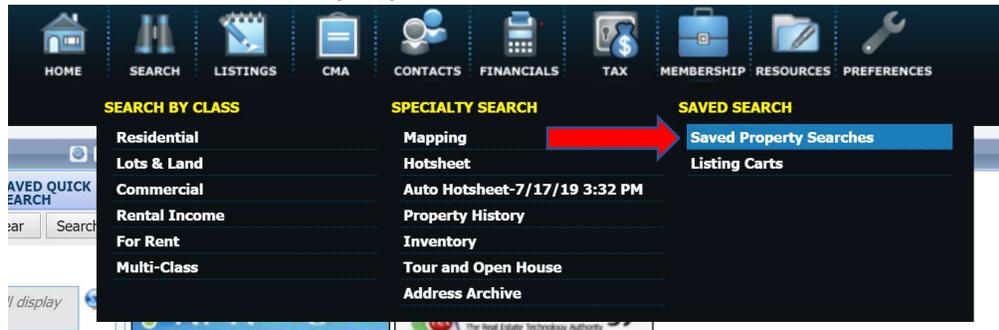


Editing Saved Searches

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

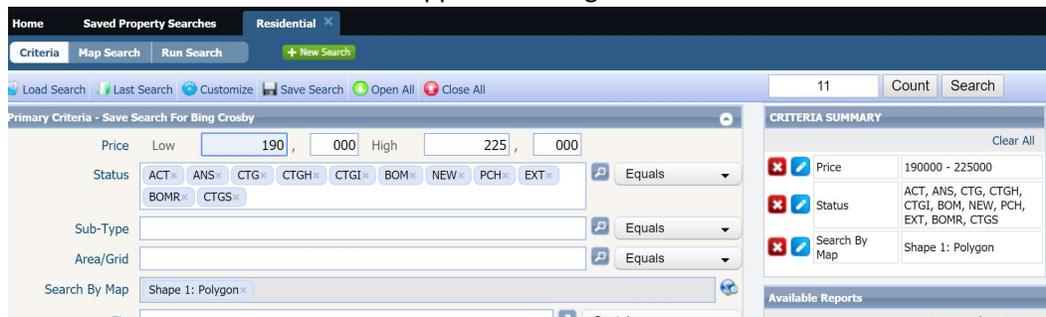
- 1) Click on **Search > Saved Property Searches**



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

<input type="checkbox"/>	Residential	new area (0)	N	0
<input type="checkbox"/>	Rental Income	Rental Income	MLS	0
<input type="checkbox"/>	Residential	Residence	MLS	0
<input checked="" type="checkbox"/>	Residential	Save Search For Bing Crosby	N	0
<input type="checkbox"/>	Residential	test (Catering, Shaky Nate's)	N	1

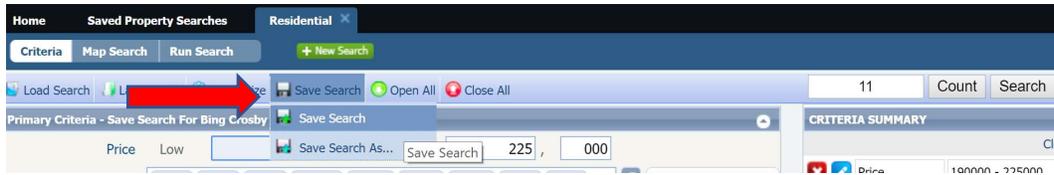
- 3) The *Search Criteria* screen should appear showing the current criteria.



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



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



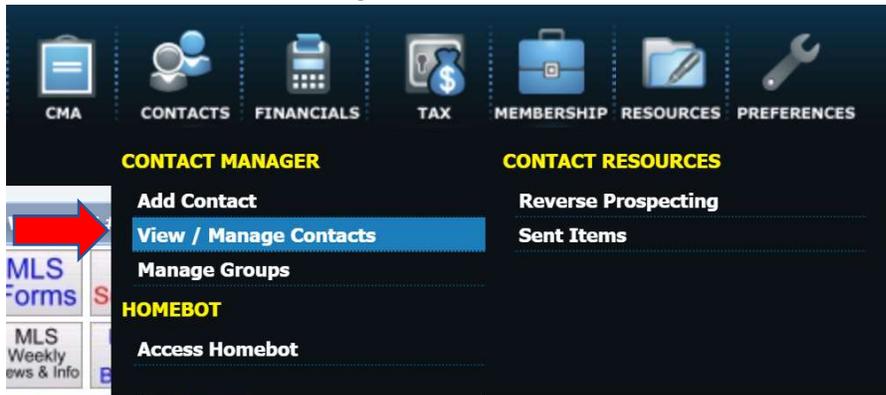
6) The name of the search will appear. Since the updates are to an existing search, just click **Save**.

A screenshot of a 'Save Search' dialog box. At the top, there are 'Save' and 'Cancel' buttons. Below this, there are two tabs: 'YOURSELF' and 'CONTACT'. The main content area is divided into three sections: 1. 'NAME YOUR SEARCH' with a text input field containing 'Save Search For Bing Crosby' and a blue edit icon. 2. 'SAVE SEARCH' with two radio button options: 'template WITH criteria values' (selected) and 'template WITHOUT criteria values'. 3. 'ASSIGN AS DEFAULT (OPTIONAL)' with two radio button options: 'Save this Residential search.' (selected) and '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)

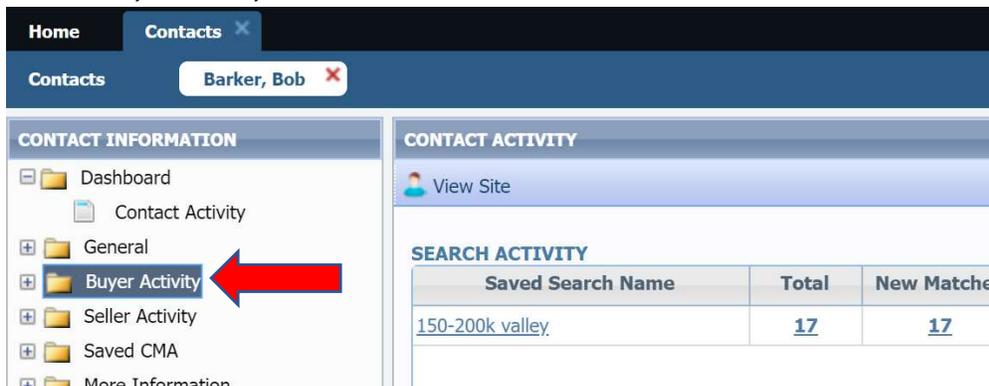
1. Go to **Contacts > View/Manage Contacts**



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



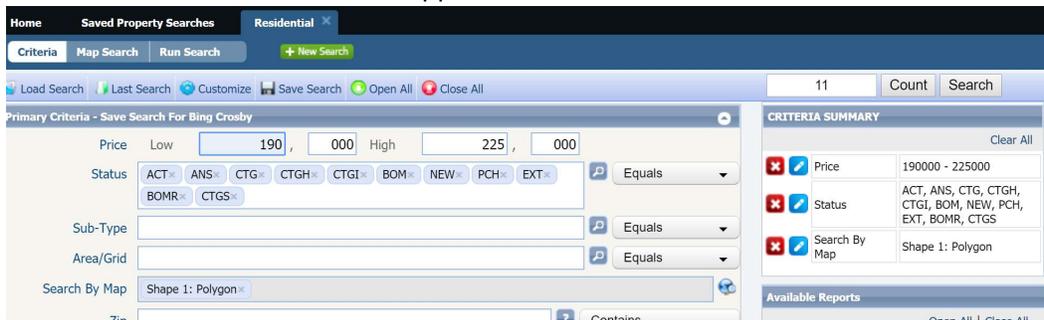
3. Click on *Buyer Activity*



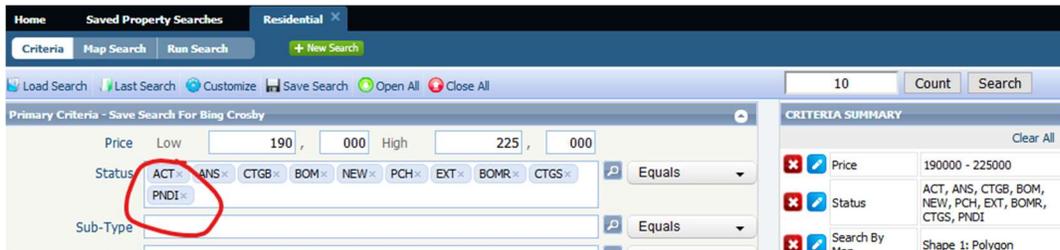
4. On the right side of the screen, click on the name of the search to be edited.



5. The Search Criteria screen should appear.



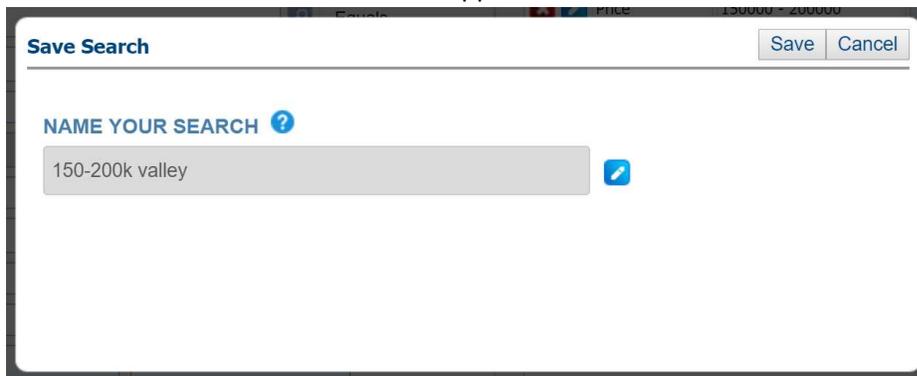
6. Make the necessary changes to the search. In this example, add the **Pending-Inspection (PNDI)** status to your criteria.



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



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



****NOTE**** This will update the search for ALL 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.