

Using Advanced Search

The *Advanced Search* page helps you dig deeper into your client data, by building reports using various criteria from the Client Manager, Device Manager, Support Manager, and Order Manager. You can save frequently-run searches and export the results.

Steps

Configuring Advanced Searches

Click the **advanced** link.



The *Advanced Search* window appears.

As an example, we're going to search the entire Client Manager for clients originating from Ubersmith's home state of New York.

1. Enter the criteria you want to search for in the *Advanced Search* window.
2. Click **Search**.

The *Advanced Search Results* window appears.

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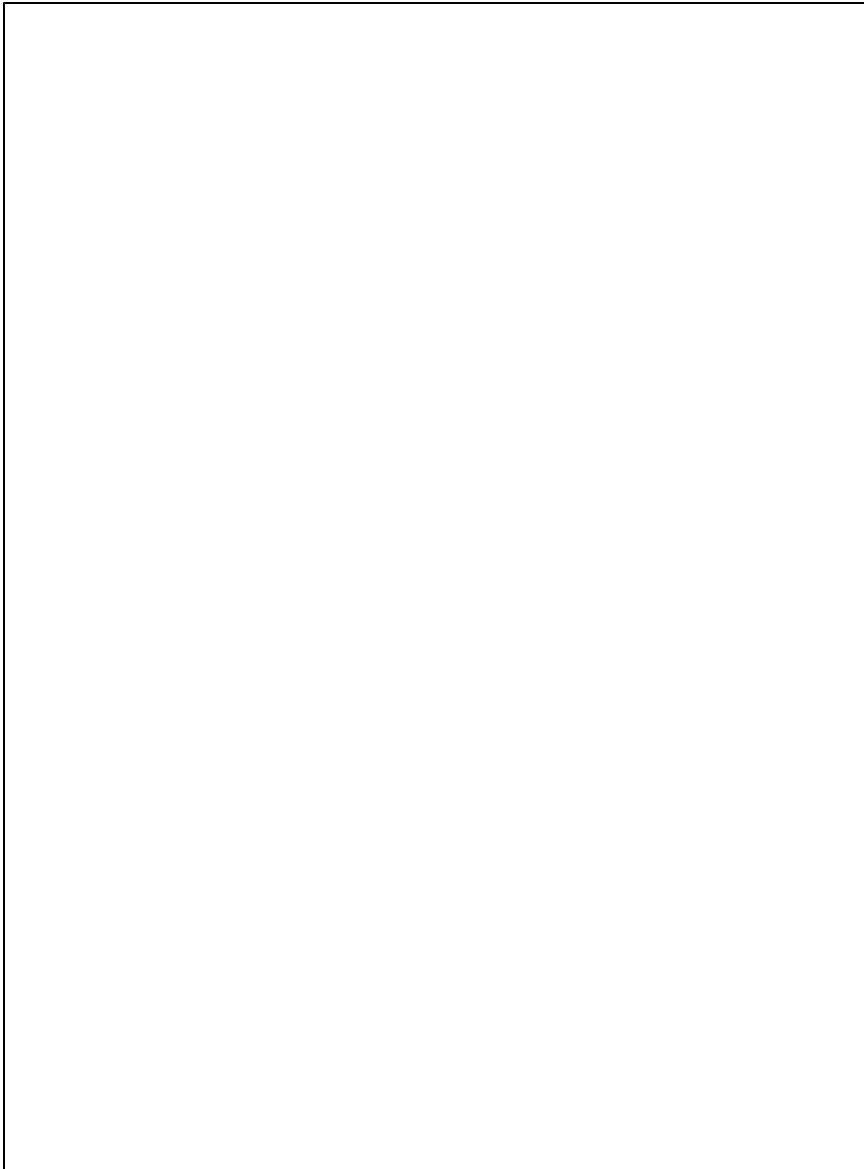
Since the Advanced Search queries the Ubersmith database directly, it may take some time for the results to be displayed.

Saving Advanced Searches

Once the results are available, you can save the search to run again, or export as a comma separated value (CSV) file.

1. Click the **save this search** link.

The *Search Sidebar* expands.



Complete the Search Sidebar as follows:

1. Type the name for your search in the **Name** field.
2. Select **Public** to make this search available to other users
3. Select **Private** to make the search available only to yourself.
4. Click **Save As New**.

Your saved search displays in the *Saved Searches* section in the *Advanced Search* window.

Related Topics