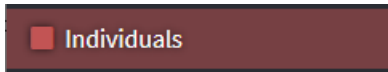# AgencyBloc: How to create a Saved Search and how to view it on your Dashboard

SAMPLE SEARCH: 1) Show me everyone who is Turning 65 from XXX date to XXX date who are not enrolled in a Medicare plan

2) Show me all my leads from a specific campaign/lead source

3) Show me all my untouched leads or a specific group of people with a specific status

In the Individual Module click on second tab 'Advanced Search)

1) Show me everyone who is Turning 65 from XXX date to XXX date who are not enrolled in a Medicare plan

☐ Add your Criteria;
   ☐ Check all the Status' that you want to include (OMIT Enrolled Medicare) – suggested boxes to check:

   Status:
   Ancillary Only OR **Appointment Set** OR **Medicare Appointment Set** OR **Email Sent Awaiting Reply** OR **Email #2 Sent** OR **Email #3 Sent** OR **Email Introduction Sent** OR
   Email with 5* info Sent OR **Email with Quote Sent** OR **Enrolled U65** OR **Enrolled with other Agent** OR **Follow up** OR **Follow up T65** OR **Incoming Lead** OR
   Initial Call - spoke with prospect OR **Left VM** OR **Left VM 2** OR **Left VM and sent Email** OR **Left VM3** OR **Mailed Letter** OR **Previous Client** OR **Quoting** OR **Quoting Medicare** OR
   ☐ **Spouse/Dependent** OR **Texted** OR **Waiting On Medicare Card**
   ☐ Add birthdate range – BE SURE to use the YEAR of birth not the current year (example: Birth Date range for everyone turning 65 in the next three months use Birth Date range 09/01/**1955** to 12/31/**1955** (**SELECT THE DATE RANGE WITH THE CORRECT BIRTH YEAR!!)**

At the bottom of the page click

2) Show me all my leads from a specific campaign/lead source

☐ Add your Criteria;
  ☐ Choose which campaign or lead source you would like to see the leads from.
  ☐ You can narrow down the search if you put lead dates in, but you DO NOT have to put in the date.

At the bottom of the page click

3) Show me all my untouched leads or a specific group of people with a specific status

4) Add your Criteria;
  a. Choose which status – or multiple statuses you would like to work on.

At the bottom of the page click

IF YOU WANT TO SAVE YOUR SEARCH TO USE AGAIN Click SAVE SEARCH at the bottom of the page

■ Chambers, JoAnn   Incoming Lead   12/29/1955   (727) 434-7433

Showing 1 to 25 of 187 entries

◄

Save Search   Start Over

Give your Search a name that makes sense to you. Click Save

Save Search

Search Name *

INCOMING LEADS

Fields marked with an * are required.

Save   Cancel

☐ Your search will be saved on the SAVED SEARCHES tab if you ever want to run it from the Individual Module – just click on the name of the search.

Search Individuals

Quick Search   Advanced Search   **Saved Searches**

Saved Searches

Name	Criteria	Last Updated By
■ INCOMING LEADS	Create Date: 10/21/2019 THRU **FUTURE** + Lead Source: NextGen	You on 10/21/2019 12:36:09 PM

☐ To have the search show up on your DASHBOARD:

Click on the DASHBOARD ICON   📊 **Dashboard**

Click on Searches Tab

Melanie Livingstone   Murray Insurance

⭐   Activities   Agency   **Searches**

☐ Find your Search you created and click on the Star to make it a favorite:

Melanie Livingstone   Murray Insurance

⭐   Activities   Agency   **Searches**

Saved Searches   All ▼

Search: [Type to filter (Name, Criteria, etc.)]

	Name ▲	Criteria
⭐	🟥 Ab INCOMING LEADS	Create Date: 10/21/2019 THRU **FUTURE** + Lead Source: NextGen

☐ Click back on the DASHBOARD ICON [📊 Dashboard] and YOUR SEARCH RESULTS WILL SHOW UP

📊 | 🟪 Groups | 🟥 Individuals | 🟩 Policies | 🟦 Agents | 🟪

Melanie Livingstone   Murray Insurance

⭐   Activities   Agency   Searches

Ab INCOMING LEADS

Name	Type	Status ▲	Lead Source	Date of Birth	Email	Home Phone	Cell Phone	Servicing
				No data available in table				

Showing 0 to 0 of 0 entries

☐ This is what you will see:

Name	Type	Status ▲	Lead Source	Date of Birth	Email	Home Phone	Cell Phone
🟥 Brooks, Hillary	Prospect	Incoming Lead	NextGen	08/27/1978	hillarybrooks34@ymail...	3059781017	

☐ Remember: Anything you check, enter, or fill in as criteria will limit your returned data to exactly what you filled in. The less criteria, the more data will be returned.

AgencyBloc HELP PAGE: https://help.agencybloc.com/hc/en-us/articles/115003860752-Advanced-Saved-Search