# Using Saved Searches to Work Efficiently

 A saved search is a set of filters and search criteria that you can name and save, in order to use again. Saved searches are useful to quickly find common sets of records, like any In Progress records assigned to a user or their team.

Saved searches are also used throughout the system for rules, reports, permission filters, linked field filters, and more. This article focuses on power users who want to use searches to more effectively find the records they need to work on.

For information about creating saved searches, see Creating Saved Searches.

Accessing Saved Searches

You can access saved searches from several places, depending on your permissions.
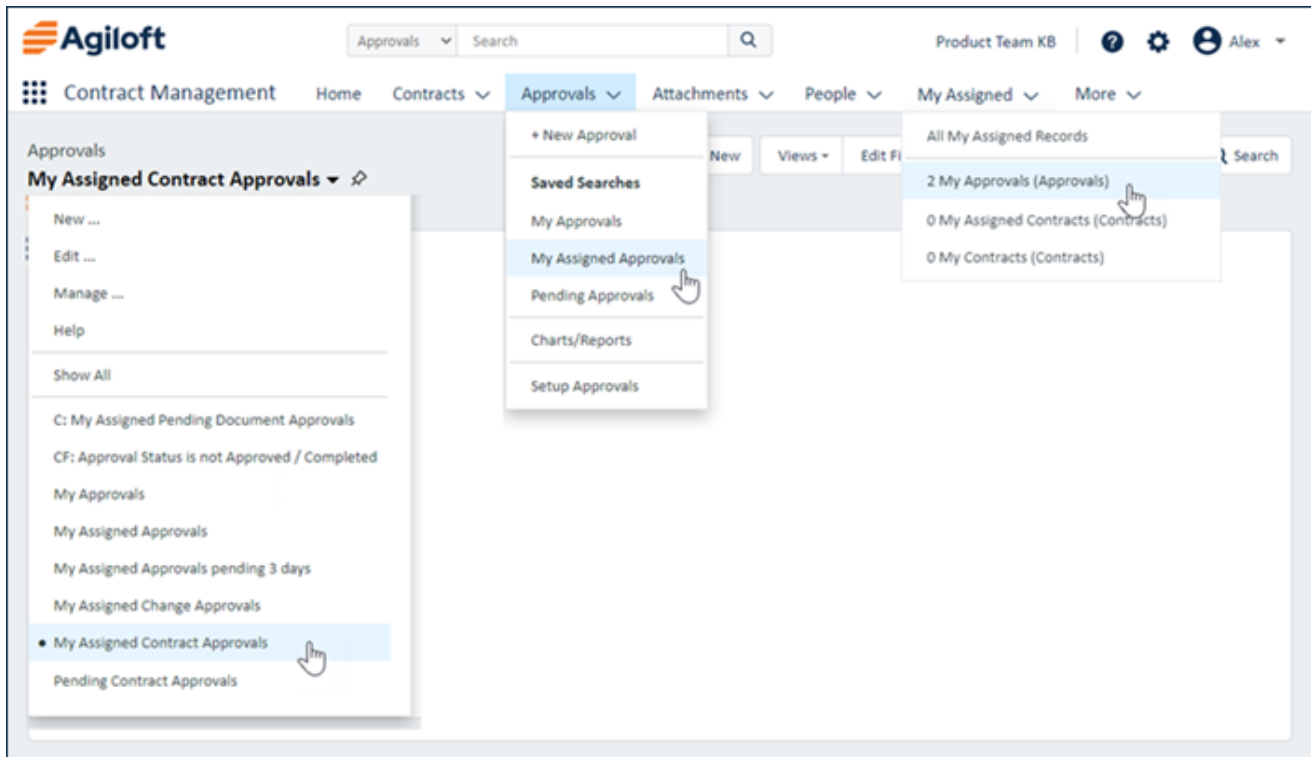
Saved search drop-downs shown in three places

There are several locations where a saved search can be accessed:

- Under the My Assigned Inbox, which can be configured to show specified saved searches and record counts. To add a search here for a group, edit the search, go to the Apply tab, and select the group in the list for showing the search in My Assigned.
- Under the table header on the navigation menu. To add a search here for a group, edit the search, go to the Apply tab, and select the group in the list for showing the search in the navigation menu.

- In the table's search drop-down, underneath Show All. Switch searches by clicking the current search name. To add a search to the drop-down for a group, make the search available to and active for the group.
- In the Manage option of the table's Search drop-down. This is visible only if you have permission to manage saved searches for the table.

After you click the search name, the results are shown in the table view. The search name appears at the top of the table below the table name. To refresh the search, click the search name to open the search drop-down and select the saved search again.

> ✅ To pin a saved search, run the search and then click the pin icon beside the search name. The pinned search is run automatically when you open the table for the first time in a session. The pinned search has (Pinned) appended to its name in the drop-down, and the pinned saved search is also shown at the top of the saved searches list when you expand a table from the navigation menu.

Managing Your Saved Searches

As a power user, you can control where each saved search appears. Open the search drop-down list from the desired table and click Manage. This opens a list of all available saved searches for the current table.

Saved Searches management screen

From here, you can choose which searches are active, available in the navigation menu, or available in the My Assigned menu:

- **Active:** Displays the saved search in the Search drop-down menu.
- **Show in Navigation Menu:** Displays the saved search underneath the relevant table in the navigation menu.
- **Show in My Assigned:** Displays the search in the My Assigned menu for quick access.

When you finish, click Save and Close to save your selections. The screen automatically refreshes with your new search preferences.