



## Save a Document Search

From an executed document search:

1. Once you perform a document search and the page refreshes, you can see the **Save New Search** option in the upper left hand corner of the screen. Select that option to save the search parameters you just used to perform the document search.

### Search Details ?

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**Filtered by**

Type: Purchase Orders

Date Type: Creation Date (System)

Date Range: All Dates

Save New Search
Export Search

2. Next, add a nickname for the search and an optional description.

### Step 1: Edit Saved Document Search Details

Nickname ★

[Add Description](#)

3. You will need to select a destination folder to save the search, then press the **Save** button.

### Step 2: Select Destination Folder

[Add New](#) ▲

- ▾ **Personal**
  - Favorites
- ▾ **Shared**

You have no shared favorites.

4. Once the search is saved, you can access it through the **Search Documents** link at the top of the page and then click **View Saved Searches**.

Search Documents ▼ > Document Search

- Search Documents
- View Saved Searches
- Download Export Files
- Create and Manage Export Templates
- My Forms