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Create Saved Searches for a Contact

Zack Mokry - 2021-07-02 - [Contacts](#)

As you share your KW Agent Site and App, you can create saved searches for your contacts. With saved searches, you can set a range of search criteria, for areas your client is interested in. The saved searches that you create will appear in the Saved section of both your Site and App, along with any searches your clients save. The system will send the contact an initial email, letting them know that there is a new saved search and the details of the search criteria.

You also have the option to set up email notifications for these saved searches. There are several email frequencies to choose from and this is a great way to keep your clients informed about listings in their desired search areas.

The lead/contact must be registered to your KW Site or App in order for the save search to send out. If you create a saved search for a lead/contact that is not registered to your KW Site or App, they will receive the initial email, but no updates.

- These saved search emails are system emails and will not count toward your Command Email credit count.

To create a saved searches for your contacts:

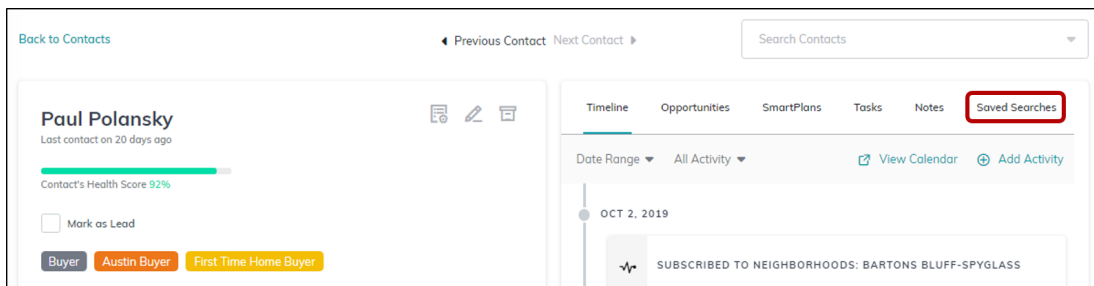
Access

1. Log in to <https://agent.kw.com> with your Keller Williams login credentials.

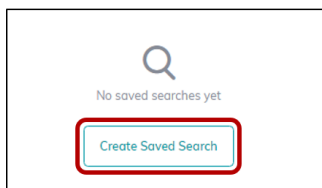
2. Click the **Contacts icon**, , on the left sidebar.

3. **Find and select the contact** you want to add a Saved Search for.

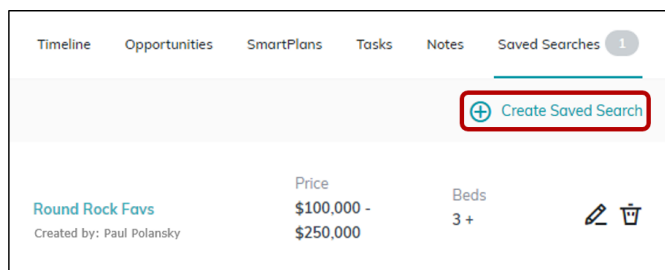
4. Click the **Saved Searches** tab, at the top right of the contact record.



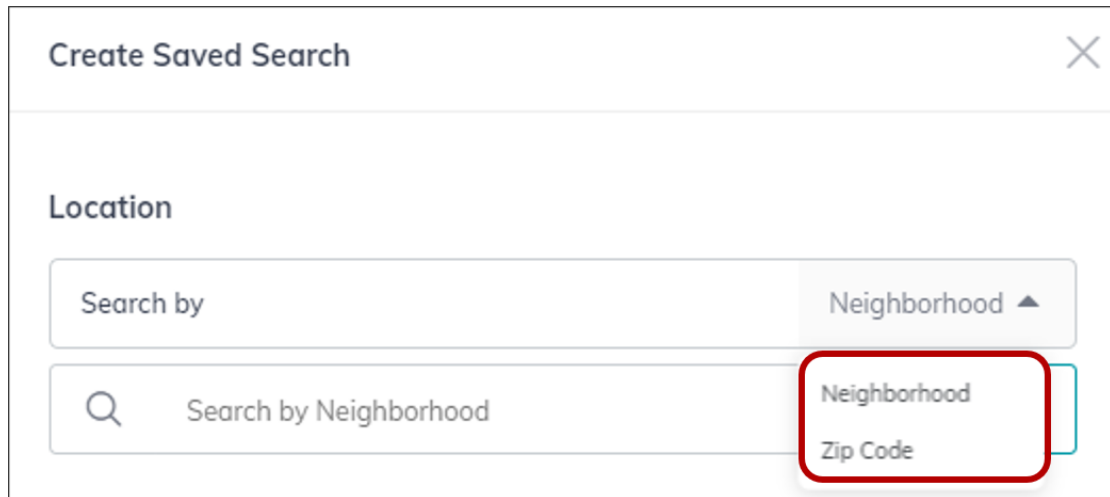
5. Click **Create Saved Search**.



Or



6. Enter a valid zip code or neighborhood into the search bar and select from the list of results.



The image shows a 'Create Saved Search' dialog box with a close button (X) in the top right corner. Under the 'Location' section, there is a search bar with the text 'Search by' and a dropdown menu currently set to 'Neighborhood'. Below the search bar is a search input field containing a magnifying glass icon and the text 'Search by Neighborhood'. To the right of the search input field, a dropdown menu is open, showing two options: 'Neighborhood' and 'Zip Code'. The 'Neighborhood' option is highlighted with a red rounded rectangle.

- Users can also use the map to add neighborhoods by zooming in with either their mouse or the + sign, hovering over the area to see the name of the neighborhood, and clicking into the desired area.

Create Saved Search



Location

Search by Neighborhood ▼

Find on Map

Property Criteria

Price

-

Keywords

0 / 30

Property Type

▼

Listing Status

▼

Beds

▼

Baths

▼

Year Built

▼

- ▼

Living Area

sqft

-

- Has Parking
- Open House Only
- Price Reduced (< 7 days ago)

Step 1 of 2

Cancel

Next

7. Fill out all of the applicable fields in the property criteria section.

Property Criteria

Price

Min - Max

Keywords

ie. view, pool, yard

0 / 30

Property Type All properties selected ▼

Listing Status For Sale: All ▼

Beds Any ▼

Baths Any ▼

Year Built Any ▼ - Any ▼

Living Area Min. Living Area - Max. Living Area **sqft**

Has Parking

Open House Only

Price Reduced (< 7 days ago)

When entering Keywords, in the form, click enter after each word. Listings must meet the criteria in the form AND include these keywords in the Keyword field, in the MLS.

8. Click **Next**, at the bottom of the form.

Create Saved Search ✕

Cat Hollow, TX ✕ Oak Brook, TX ✕ Meadows Of Brushy Creek, TX ✕
Woods Of Brushy Creek, TX ✕

Property Criteria

Price

-

Keywords

0 / 30

pool ✕ yard ✕ garage ✕

Property Type Listing Status

▼ ▼

Beds Baths

▼ ▼

Step 1 of 2

9. Enter a **Saved Search Title**.

Create Saved Search ✕

Saved Search Title *

30 / 30

Primary Email for Aaron Miller *

To edit this email address, edit the contact.

Send email notifications

Step 2 of 2 [Back to Step 1](#) [Create Saved Search](#)

10. If you want to include regular email notifications for this saved search, click the **Send Email Notifications** toggle.

Create Saved Search ✕

Saved Search Title *

30 / 30

Primary Email for Aaron Miller *

To edit this email address, edit the contact.

Send email notifications

Step 2 of 2 [Back to Step 1](#) [Create Saved Search](#)

11. Set the **Email Frequency**.

Instant - as soon as there is a new or updated listing, within this search criteria, the system will send the client highlighting what's new. This will happen within 30 minutes of the change being made.

Daily Summary - this will send a regular summary email, with listings in this search criteria, at 9 AM CST, every morning.

Weekly Summary - this will send a regular summary email, with listings in this search criteria, at 9 AM CST, every other Monday morning.

Bi-weekly Summary - this will send a regular summary email, with listings in this search criteria, at 9 AM CST, every Monday morning.

Monthly Summary - this will send a regular summary email, with listings in this search criteria, at 9 AM CST, on the 1st day of each month.

Create Saved Search ✕

Primary Email for Aaron Miller *

aaron.miller@gmail.com

To edit this email address, edit the contact.

Send email notifications

Send an email to your client when new homes meet your selected criteria. Your client can always unsubscribe or change their notification preferences.

Email Frequency

- Instant
Sends within 30 minutes
- Daily Summary
Sends daily at 9:00am
- Weekly Summary
Sends on Mondays at 9:00am
- Bi-weekly Summary
Sends every other Monday at 9:00am
- Monthly Summary
Sends on the 1st of the month at 9:00am

Step 2 of 2

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12. Click **Create Saved Search**.

Create Saved Search ✕

Primary Email for Aaron Miller *

aaron.miller@gmail.com

To edit this email address, edit the contact.

Send email notifications

Send an email to your client when new homes meet your selected criteria. Your client can always unsubscribe or change their notification preferences.

Email Frequency

Instant
Sends within 30 minutes

Daily Summary
Sends daily at 9:00am

Weekly Summary
Sends on Mondays at 9:00am

Bi-weekly Summary
Sends every other Monday at 9:00am

Monthly Summary
Sends on the 1st of the month at 9:00am

Step 2 of 2

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