

Search...

SEARCH



# Getting Started

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## How to create a Saved Search

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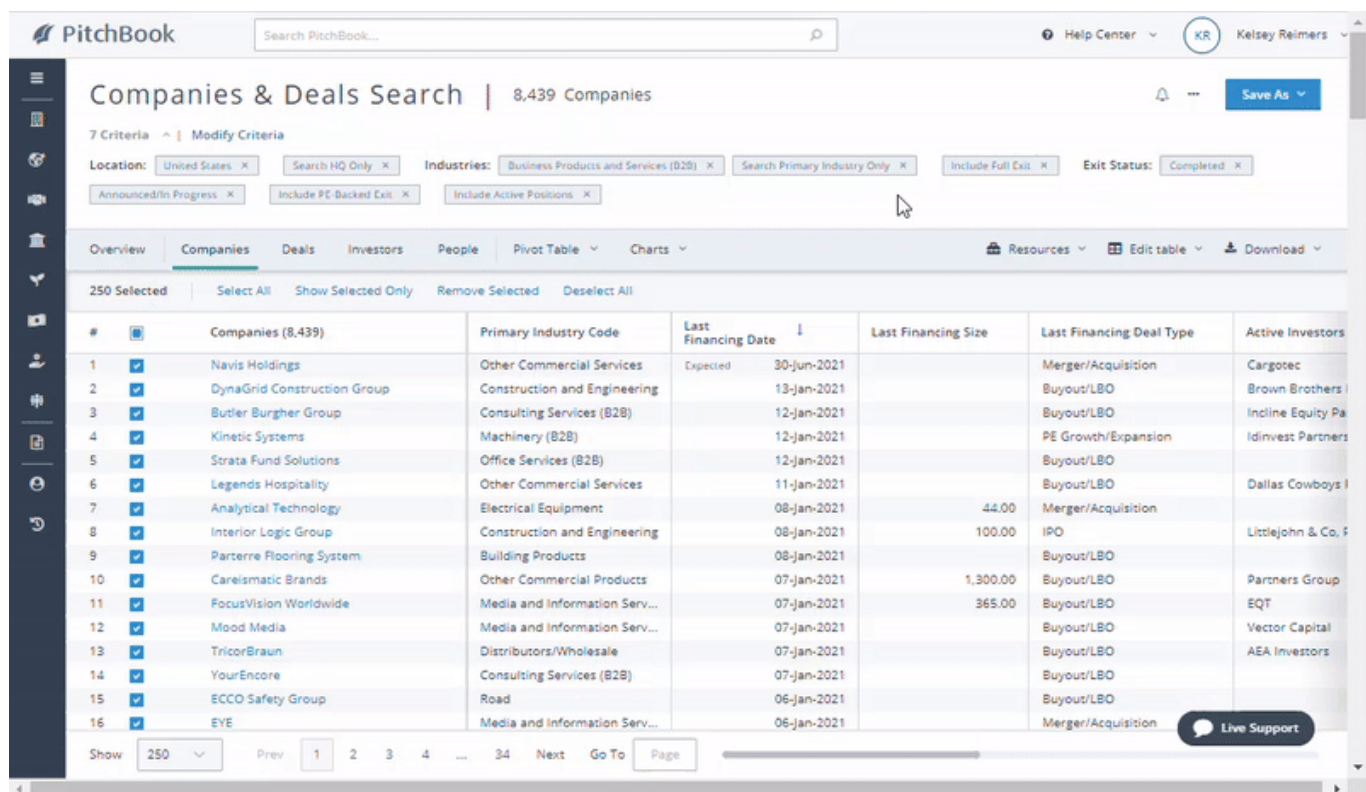
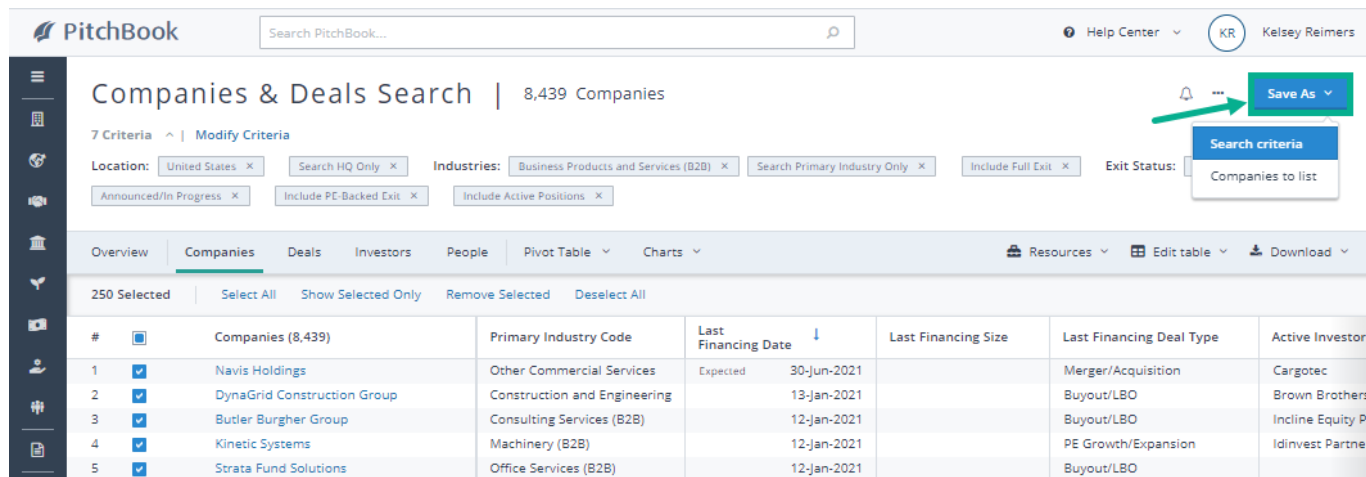
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### **Overview**

Advanced Searches are the core of the PitchBook Platform. By saving your search you can receive alerts anytime we add new data that is relevant to your search criteria. The below step-by-step walk-through assumes you are already comfortable running advanced searches. If you have not run an advanced search yet, check out our article on the [Basics of Advanced Searches \(https://help-pitchbook-com.proxy.library.emory.edu/s/article/Basics-of-Advanced-Searches\)](https://help-pitchbook-com.proxy.library.emory.edu/s/article/Basics-of-Advanced-Searches).

### **How to Save a Search**

After you've spent some time building a search and adjusting the columns, there's a good chance that you'll want to save your hard work to revisit it later. You can save your search by clicking on the **Save As** button located at the top-right of the page and selecting **Search Criteria**.



From the save search pop-up, you can name your search so you can remember what kind of list you created. Here can also set an email alert in case there are any changes in the companies or deals from your search. This is a great feature for when you want to receive updates on a particular industry or financing type. Click **Continue** once you have chosen a name and alert settings.

## Save Search ×

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Saving your search creates a dynamic list based on your search criteria. To create a static list of entities, [save as a saved list](#).

**Search Name**

VC backed IPOs since 2016

Do you want to receive email alerts when there are updates to entities in your search?

Receive Alerts

No Alerts

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[Continue](#) [Cancel](#)

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If you opt in to receive alerts, you will be prompted to customize them. An important thing to note is that Saved Searches are *dynamic*. This means any time a new company matches the criteria that you've selected, it will appear in the search.

Choose the information you'd like to see in alerts and how often you'd like to receive these alerts. If at any time you'd like to update your Saved Search alerts you can do so, we explain how to do this in the following steps.

Once you've saved your alert settings your newly saved search will appear in your **Saved Searches** section. You can find the **Saved Search** section, under the **My PitchBook** section left-hand toolbar. Look for the person icon.

The screenshot shows the PitchBook interface. At the top left is the PitchBook logo and a search bar. Below the logo is a navigation sidebar with various icons. The main content area is titled 'Saved Searches & Lists' and has two tabs: 'My Searches (12)' and 'My Lists (9)'. A dropdown menu is open over the sidebar, showing options like 'Workspaces', 'Alerts & Subscriptions', 'Saved Searches & Lists' (highlighted), 'Notes & Files', and 'Plugins & Apps'. The main content area displays a list of saved searches with names like 'B2C Angel Deals in the US' and 'B2C US Angel Deals'.

In the **Saved Searches** section, you will see a list of all the searches you've saved. To update your search's alert settings, click the **bell icon**. To *modify* the search criteria, click the **down chevron icon** next to the search name.

The screenshot displays the PitchBook 'Saved Searches & Lists' page. At the top, there is a search bar and user information for Kelsey Reimers. The main section is titled 'My Searches (12)' and 'My Lists (9)'. A dropdown menu shows 'All Searches (12)' and a search input field. Below this is a table of saved searches:

Name	Search Type	Date Created	Last Run	Last Shared	Alerts	# of Results	# of Alerts
B2C Angel Deals in the US	Company	27-Oct-2020	05-Jan-2021		None	8358	
B2C US Angel Deals	Company	27-Oct-2020	27-Oct-2020		None	8358	
Case Study- Deal Specs	Company	26-Oct-2017	26-Oct-2017		None	59	

The first search, 'B2C Angel Deals in the US', is expanded to show its search criteria:

- Deal Status: Completed
- Deal Type: All VC Stages > Angel
- Location: United States
- Search HQ Only
- Industries: Consumer Products and Services (B2C)
- Include Active Positions

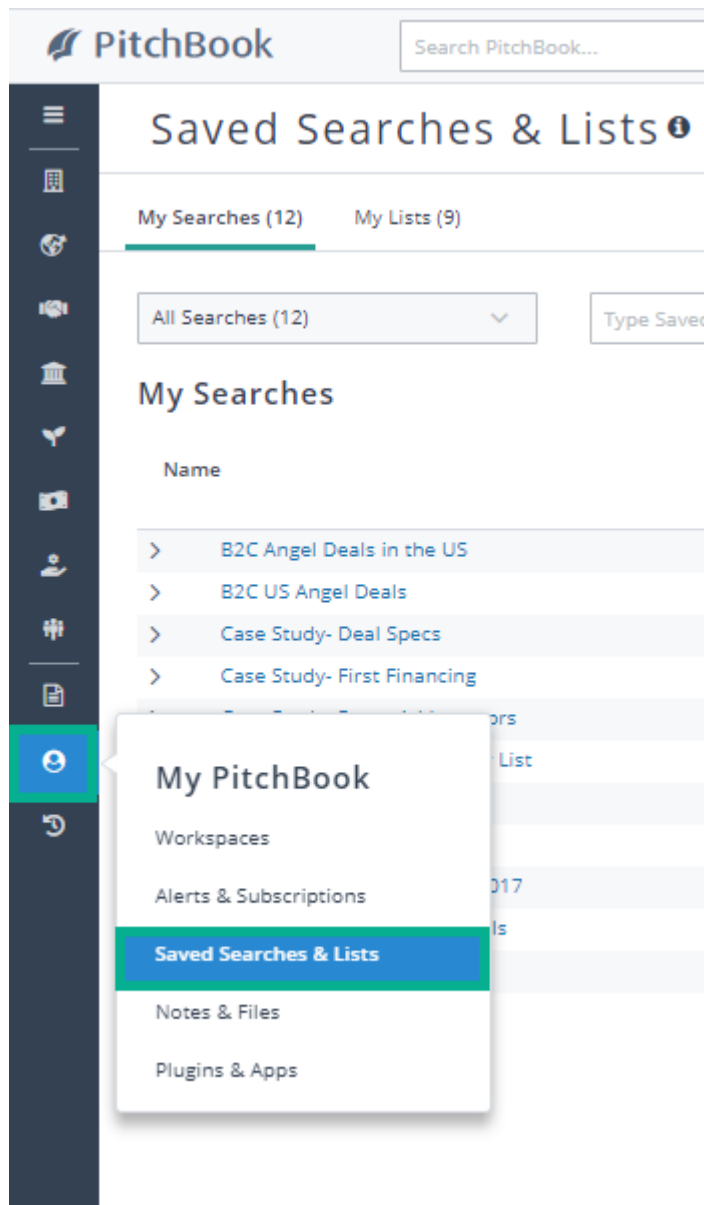
A 'Modify Criteria' button is located below the criteria list.

To run a saved search, click the search's name.

## Frequently Asked Questions

How can I access my saved searches?

You can find the Saved Search section, under the **My PitchBook** section left-hand toolbar. Look for the **person icon**.



Can I update my saved search alerts?

To update your search's alert, click the **bell icon** next to the search name.

PitchBook Saved Searches & Lists

My Searches (12) My Lists (9) [Create Search](#)

All Searches (12)

Name	Search Type	Date Created	Last Run	Last Shared	Alerts	# of Results	# of Alerts
> B2C Angel Deals in the US	Company	27-Oct-2020	11-Mar-2021		None	8358	
> B2C US Angel Deals	Company	27-Oct-2020	27-Oct-2020		None	8358	
> Case Study- Deal Specs	Company	26-Oct-2017	26-Oct-2017		None	59	
> Case Study- First Financing	Company	12-Mar-2018	12-Mar-2018		None	7	
> Case Study- Potential Investors	Company	01-Nov-2017	01-Nov-2017		None	59	
> Case Study- Service Provider List	Company	12-Mar-2018	12-Mar-2018		None	56	
> M&A Test Search with Alerts	Company	05-Mar-2020	05-Mar-2020	05-Mar-2020	None	3115	
> New and Updated deals	Company	18-Dec-2015	18-Dec-2015		None	673764	

Can I edit a saved search?

To modify your search's the search criteria, click the **down chevron** next to the search name and then click the **Modify Criteria** button below the Search Criteria box.

PitchBook Saved Searches & Lists

My Searches (12) My Lists (9) [Create Search](#)

All Searches (12)

Name	Search Type	Date Created	Last Run	Last Shared	Alerts	# of Results	# of Alerts
B2C Angel Deals in the US	Company	27-Oct-2020	05-Jan-2021		None	8358	

Name B2C Angel Deals in the US

Search Criteria

Deal Status: Completed

Deal Type: All VC Stages > Angel

Location: United States

Search HQ Only

Industries: Consumer Products and Services (B2C)

Include Active Positions

[Modify Criteria](#)

> B2C US Angel Deals	Company	27-Oct-2020	27-Oct-2020		None	8358	
> Case Study- Deal Specs	Company	26-Oct-2017	26-Oct-2017		None	59	

Can I use my saved search in excel?

Yes, we go over the details of how you can use a saved search in Excel in our [Using Saved Searches in Excel article](https://help-pitchbook-com.proxy.library.emory.edu/s/article/Saved-Searches) (<https://help-pitchbook-com.proxy.library.emory.edu/s/article/Saved-Searches>).

[How-to-save-a-search-and-manage-email-alerts](#)

[How to create a Saved Search](#)

[Kelsey Reimers \(/s/profile/0053p0000069yXeAAI\)](#), 5/28/2021 3:17 PM

5/28/2021 3:17 PM

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2



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