Search…　　　　　　　SEARCH

Getting Started

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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).

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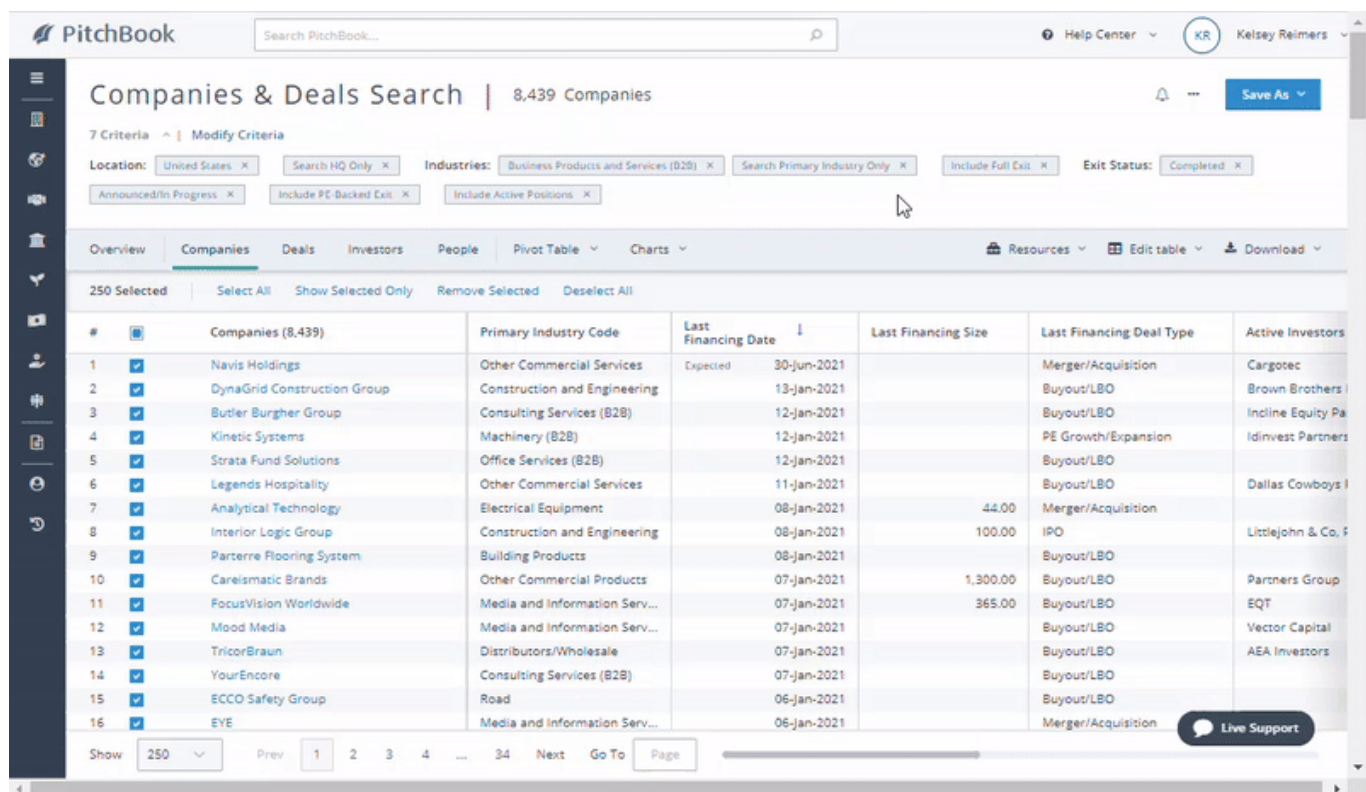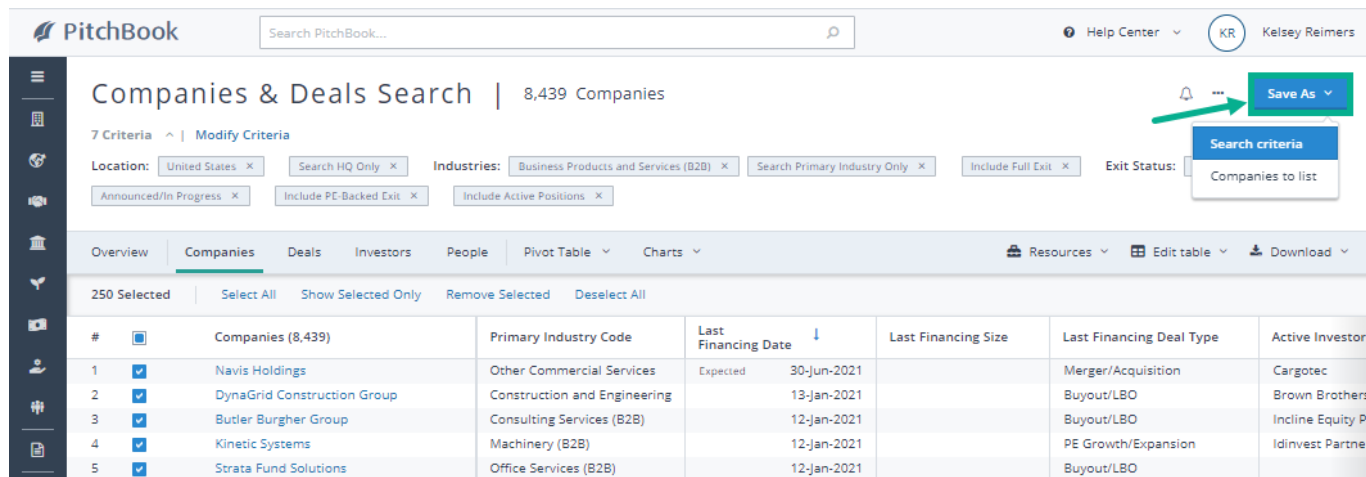
From the save search pop-up, you can name your search so you can remember what kind of list you created. Here can also set an email alert in case there are any changes in the companies or deals from your search. This is a great feature for when you want to receive updates on a particular industry or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

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.

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.

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**.
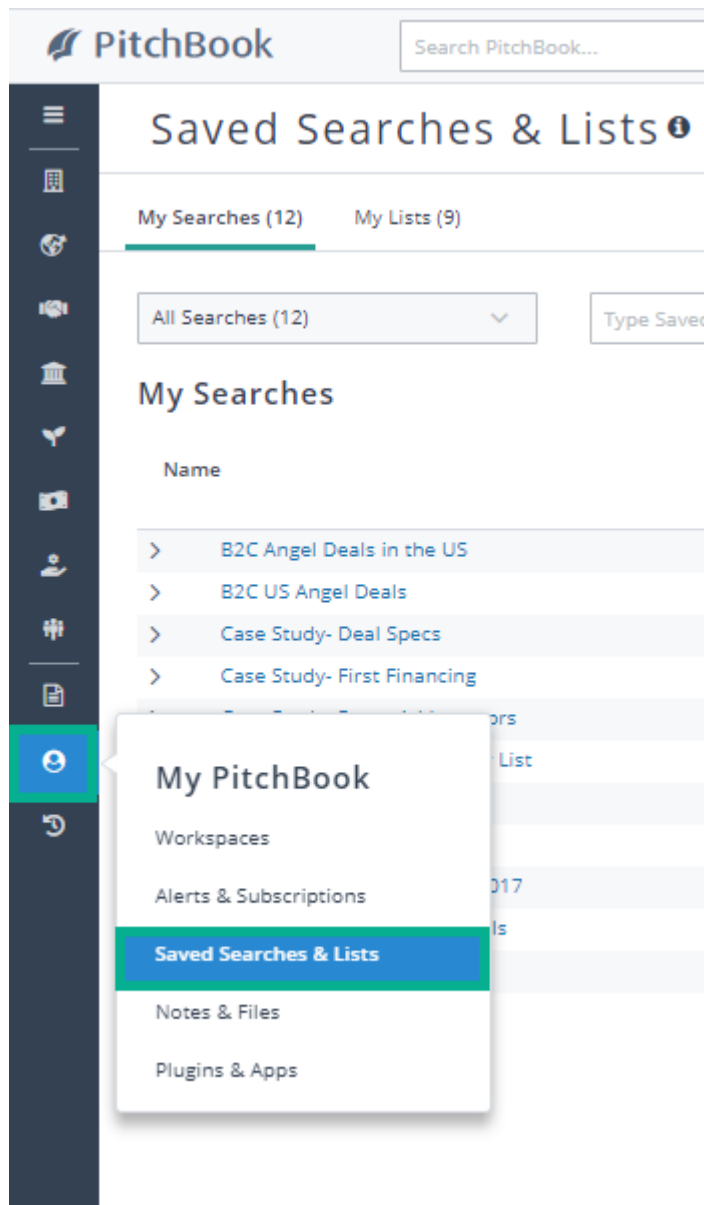
Can I update my saved search alerts?

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

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.

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 <u>Using Saved Searches in Excel article (https://help-pitchbook-com.proxy.library.emory.edu/s/article/Saved-Searches)</u>.

How-to-save-a-search-and-manage-email-alerts

How to create a Saved Search

<u>Kelsey Reimers (/s/profile/0053p0000069yXeAAI)</u>, 5/28/2021 3:17 PM

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