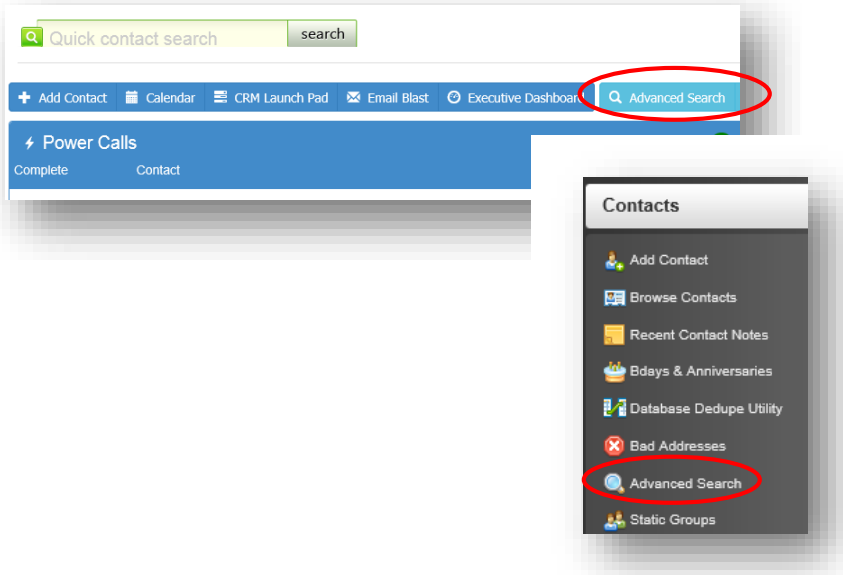


surefire

Advanced Search

Advanced Search helps you mine your database for specific criteria. For example, you might search for bad email addresses in your database; number of prospects added over a certain time period; or clients who have loans with specific loan types.



Click **Advanced Search** from the top menu on your Surefire dashboard or the right navigation bar menu.

Filter Fields	Sort	Display	Filter Values
First Name	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Last Name	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Nickname	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Phone	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Email Address	<input type="radio"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Email Status	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Website	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Birthday (Range)	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/> -through- <input type="text"/>

You will see a long list of **Filter Fields** consisting of all fields in your database, including custom fields.

For our example, we will click the square **Display** box for first and last name, phone number and email address. Results will be sorted by last name.

Loan Type	<input type="radio"/>	<input checked="" type="checkbox"/>	FHA
Lien Number	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Loan Purpose	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Loan Occupancy	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Referring Agent	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Subject Property Address	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Subject Property City	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Subject Property State	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Subject Property Zip	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Loan Status	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Loan Product	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Loan Rate (% Range)	<input type="radio"/>	<input checked="" type="checkbox"/>	5.5 -through- 7.5

Then we'll scroll down and select **FHA** as the **Loan Type** and enter **5.5 through 7.5** as the **Loan Rate (% Range)**. Be sure to click the square **Display** button.

Referred When	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Interested In	<input type="radio"/>	<input type="checkbox"/>	<input type="text" value="v"/>
Notes	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
Frequently Asked Question	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
FAQ Answer	<input type="radio"/>	<input type="checkbox"/>	<input type="text"/>
I am interested in	<input type="radio"/>	<input type="checkbox"/>	<input type="text" value="v"/>
			<input type="button" value="Search"/>

Scroll to the bottom of the list and click **Search**.

Search Results - 240 Results

[Refine Search](#) [Download as Spreadsheet](#)

To scroll to the right or left, click on the circle and use this sliding scroll bar.

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First Name	Last Name	Co First Name	Co Last Name	Phone	All Phone	Co Phone	Co All Phone	Email	Co Email	Loan Type	Loan Rate
Matthew	Allen	Jacelyn	Allen	(404) 553-1152	(404) 803-6453	(404) 797-8511		matthew.allen@top-of-mind.net	jacelyn.allen@top-of-mind.net	HELOC	6.0000
Dawn	Altman			(770) 962-3007				dawn.altman@top-of-mind.net		FHA	5.5000
Brian	Anderson	Kate	Anderson	(404) 382-4585		(404) 903-9186		brian.anderson@top-of-mind.net	kate.anderson@top-of-mind.net	USDA	7.5000

You'll see a list with criteria you selected, displayed 25 per page.

Search Results - 240 Results

[Refine Search](#) [Download as Spreadsheet](#)

From there, you can choose to **Refine Search**, going back to the Advanced Search screen, or to **Download as Spreadsheet**.

It's that simple!

