

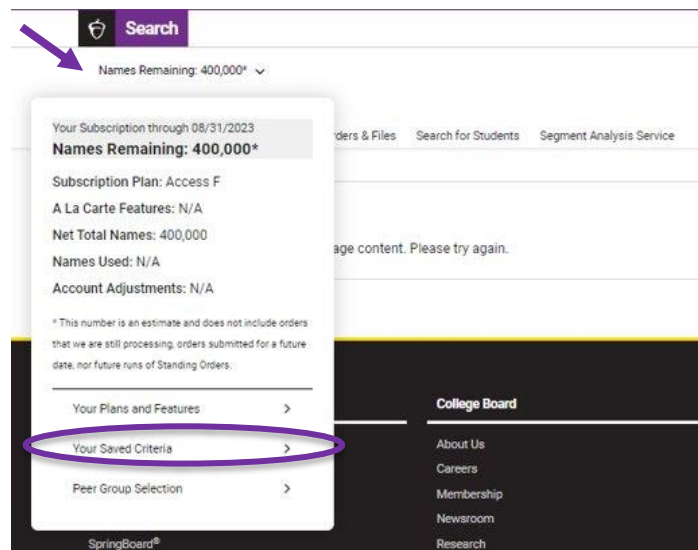
Saved Criteria in Search

College Board Search adapts to your needs as they evolve and allows you to create a personalized experience you can return to again and again. Chances are, you have unique criteria you'll want to save in Search to find the students you need now and later.

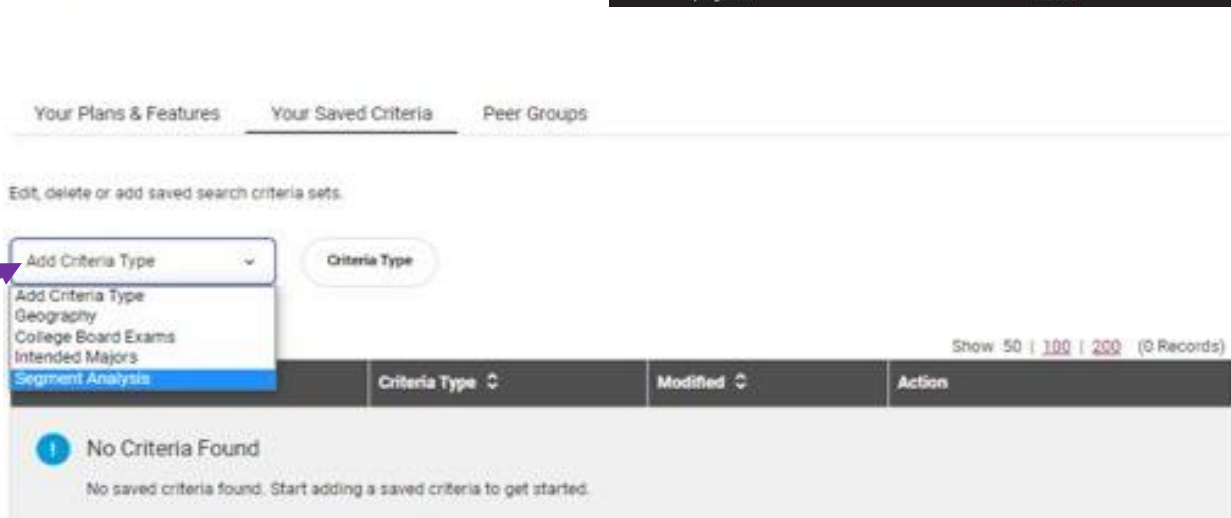
How to use Saved Criteria:

Visit My Account to save your recurring selections, then use them to populate filter criteria in future Search orders. Follow these quick and intuitive steps to get started.

1. Log in to cbsearch.collegeboard.org and select your organization's department name under the drop-down menu ("Sample College Undergraduate ADMISSIONS")
2. Click on "Names Remaining" (or "Account Type: Per-Name")
3. Click on "Your Saved Criteria"
4. Under Add Criteria Type, select the filter group you'd like to configure



My Account



5. Name your criteria group, enter your selections, and click “Save and Close” to create

Show 50 | 100 | 200 (0 Records)

| Name ^ | Criteria Type ↕ | Modified ↕ | Action |
|------------|-----------------|------------|---------------|
| New Save 1 | Geography | 01/19/2023 | Edit Delete |

Enter preference name

Save and Close Cancel

Click the tabs to customize a search by the students' geographic origin. This is defined by the location of the home or school.

Saved Criteria

Address
 Home address
 High school address

Home School
 Include only home schooled students

Zip Code
 OR

Need Help?
[Tips for uploading Zip codes](#)
[Find ZIP codes at usres.com](#)

US States & Territories | Geomarkets | Counties | MSAs | International

Selecting a state searches within the entire state. Use Geomarkets, Counties, or MSAs to narrow your search.

Select U.S. States or Territories

- Select all
- Alabama
- Alaska
- Arizona
- Arkansas
- California
- Colorado
- Connecticut
- Delaware
- District of Columbia
- Kentucky
- Louisiana
- Maine
- Maryland
- Massachusetts
- Michigan
- Minnesota
- Mississippi
- Missouri
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Rhode Island
- South Carolina
- South Dakota
- Tennessee

6. View “Your Saved Criteria” list to add Criterion Types or Edit/Delete your previous selections

My Account

Your Plans & Features | **Your Saved Criteria** | Peer Groups

Edit, delete or add saved search criteria sets.

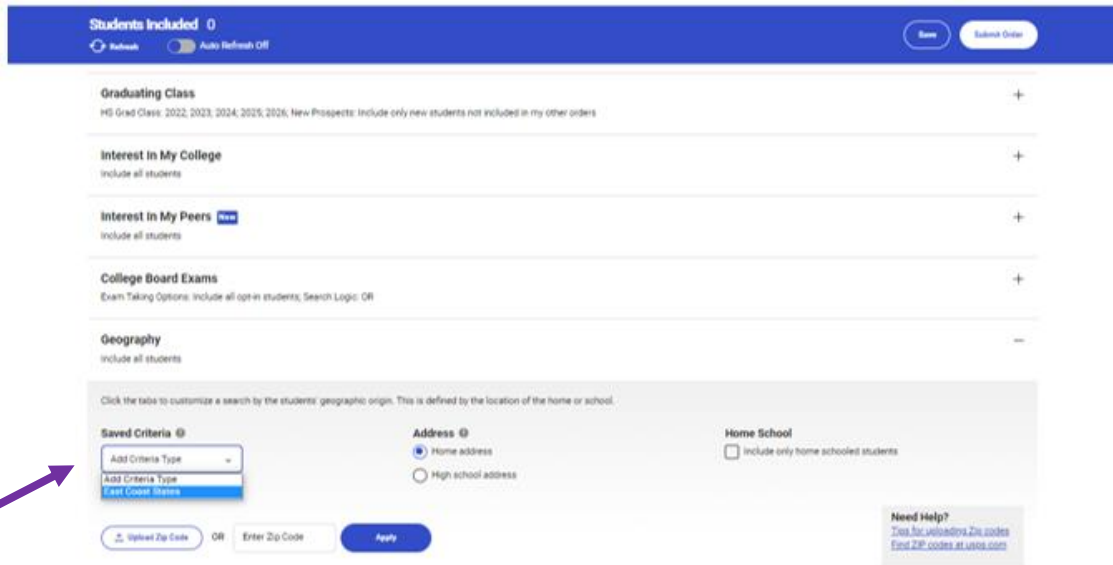
✔ Success!
✕

Your saved search has been created

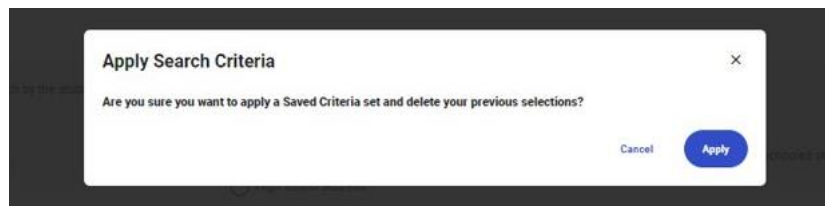
Show 50 | 100 | 200 (1 Record)

| Name ^ | Criteria Type ↕ | Modified ↕ | Action |
|-------------------|-----------------|------------|---------------|
| East Coast States | Geography | 01/19/2023 | Edit Delete |

- Now you can utilize your saved criteria in your Search orders—click “Start a New Search” or open a saved order to find your criteria within the corresponding filter drop-down



- Click “Apply” to confirm your selection and proceed with your order. You can also inform other users within your Search department of your saved preferences as any user can use the same saved criteria.



Saved Criteria While Building an Order:

You can create a Saved Criteria grouping while building an order by selecting “Save to Search Preferences” when selecting criteria under Geography, College Board Exams, and Intended Majors.

| Criteria | Selections | Clear All | Save To Search Preferences |
|----------------------------|--|-----------|----------------------------|
| U.S. States or Territories | Alabama x Florida x Georgia x Mississippi x South Carolina x | | |

Saved Criteria Use Cases from Peer Institutions:

- Zip code or geomarket lists for primary, secondary, and tertiary markets
- Major groupings for specific program outreach initiatives
- AP Exam courses with credit-bearing score ranges
- Segment Analysis Service (SAS) cluster groupings for attributes such as propensity to apply, out-of-state mobility, access initiatives, and more!

Contact us at collegeboardsearch@collegeboard.org with questions or visit cbsearch.collegeboard.org to set up a consultation and view additional resources.