How to Use Saved Tabs

The saved tabs tool enables you to search for records and then save the search as a page tab. This is useful if you need to regularly view records that meet certain criteria, such as Participants attending on a specific project or assigned to you as a Case Worker. Youcan also reorder page tabs to customise the landing page for a database.

You first need to run an Advanced Search with the desired criteria:

- Hover over **Contacts** and select a database, such as **Participants**

- Click on the **Magnifying Glass** icon

- Enter the search criteria that you wish to use. For example, you could choose to display all Participant records attending on aparticular Agency Project:

![Views logo](V Views)

- Click **Search**

All records that meet the criteria will be displayed. You can now save thesearch as a tab:

- Click on **Actions** and select **Save As Page Tab**

- Enter a **Title** for the tab

- Click **Submit**

The saved tab will be added to the database:

To manage all page tabs:

- Click on **Actions** and select **Manage Page Tabs**

All page tabs for this database will be listed. You can use the actions buttons to the right of each tab to **View, Edit** or **Delete**. To reorder tabs, click **Actions** and select **Edit Page Tabs Order,** then use the arrow icons to change the order and click **Save** to

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confirm. The page tab listed at the top will become the landing page for this database.