

SAVE & SHARE YOUR FAVORITE FILTERS

DO YOU HAVE A FAVORITE SET OF FILTERS THAT YOU KEEP COMING BACK TO?

Now you can save those filters in the Loyalty Portfolio to quickly find high-intent buyers across multiple customer lists.

SETTING UP YOUR FILTERS

1

Open your Loyalty Portfolio and apply your desired filters.

2

Navigate to the top of the filters menu and click “**Save.**”

3

Name your filter and click “**Save!**”

BONUS:

If you click “**Share access,**” your entire team will be able to see your new Saved Filter!

SAVE & SHARE YOUR FAVORITE FILTERS

All your Saved Filters will be available in the Filters tab, so you can quickly click into different customer lists.

PRO TIP:

TRY BUILDING OUT THESE POPULAR FILTERS

If you need some inspiration for where to start, here are some common filter combinations you can apply to find your next sale in Mastermind:

FILTER BY “**CAMPAIGN VIEW, NOT CONTACTED**”

Status:

Not Contacted

Campaign:

1 Campaign View, 2+ Campaign Views

FILTER BY “**HIGH MILEAGE / OUT OF WARRANTY**”

Portfolio:

Finance

Current Vehicle Filters:

Months of Ownership: Minimum 36 months

Remaining Payments: Minimum 18 payments remaining

Mileage: Minimum 100,000 miles

FILTER BY “**LEASE ENDING**”

Portfolio:

Lease

Current Vehicle Filters:

Remaining Payments: Minimum 0, Maximum 6

If you have any questions, reach out to your local Mastermind or [get more information](#) on Mastermind Academy!