

How to Save a Search & Setup Funding Email Alerts

Step 1: Enter search terms.

Click Locate Funding to execute search.

Ensure Category Filters and Search Options are configured as desired.

The screenshot shows a search interface. At the top, there is a search bar containing the text "business -conference". To the right of the search bar are three buttons: "Clear", "Locate Funding", and "Save". Below the search bar, a message states "You have additional filters active. [Click here to edit them.](#)".

Below this, it says "Results Found: 60" and "Reset Filters" with an "Export" dropdown button.

A table is displayed with the following columns: SPIN ID, Opportunity Title, Sponsor Name, Sponsor Number, Deadline Date, and Funding Amount. The first row of data shows "Horizon 2020 Dedicated SME Instrument - New Business".

Category Filters and Search Options can also be viewed / edited via the Preferences menu

The screenshot shows a "Preferences" menu. The menu items are:

- Applicant Location
- Applicant Type
- Project Type
- Project Location
- Citizenship
- Sponsor Type

Below these are sections for "Limit to New/Updated Opportunities", "US Federal Opportunities: Exclude", "Limited Submission Opportunities: Include", "Closed Opportunities: Include", and "Display Currency: Euro".

At the bottom, there is a section for "Export Data Options".

- Step 2:** Click Save button
 Enter Search Name
 Select the email format and update frequency
 Save Changes

Save Current Search

Search name:

Would you like to configure SMARTS™ automation? [Help](#)
Note: This can be setup or edited under Funding Alerts later.

Receive email updates?

Update frequency

All new and updated funding opportunities which match this Saved Search will be delivered to the user via email or RSS feed depending on your choices.

- Step 3:** Manage Funding Email Alerts from the Funding Alerts menu
 From this screen you may execute a search manually and manage the automation preferences

Search ▾ Preferences ▾ Saved Searches ▾ **Funding Alerts ▾** Bookmarks ▾ Administration ▾ Help ▾

Manage Funding Alerts

Load Funding Alerts Save Changes

Run	Search Name			SMARTS™ Automation		His...
<input type="checkbox"/>	Management			None ▾	None ▾	
<input type="checkbox"/>	Mechanical Engineering	25-Oct-2016	25-Oct-2016	None ▾	None ▾	
<input type="checkbox"/>	Renewable Energy	25-Oct-2016	25-Oct-2016	None ▾	None ▾	
<input checked="" type="checkbox"/>	Wind Energy	18-Nov-2016	18-Nov-2016	Weekly ▾	HTML ▾	

NOTE: Before clicking the SPIN Funding Opportunity link in the **SMARTS** email, you must have the SPIN site open. Otherwise you will be prompted to login to SPIN through the SPIN login screen (not InfoEd). If you are prompted to login to SPIN but only have an InfoEd account, login to InfoEd and access the **SPIN** site from there. If you have a login to SPIN, then use those credentials. The link in the email will then bring you directly to the Funding Opportunity Announcement.