

How to add a new contact

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Before you begin

Search for the person first to make sure they do not already exist in HelpOne. This prevents duplicate records.

Steps to add a new contact

1. Go to the **Contacts** section from the main navigation.
2. Click the **New Contact** or **+ Add** button.
3. Complete the key fields:
 - First Name and Last Name (usually required)
 - Email address
 - Phone number(s)
 - Organization / Company (if applicable)
 - Address information
4. Add any additional details your organization uses (notes, tags, custom fields, preferred contact method, etc.).
5. Click **Save**.

Once the contact is saved, the record is available throughout HelpOne. You can link it to donations, pledges, volunteer activities, event registrations, tasks, and more.

Tip: The more complete the record, the more useful it becomes for mail merges, reporting, and future outreach.
