

How to search and filter contacts

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Finding the right person quickly is essential.

Using search

- Use the search bar at the top of the Contacts list or the global search bar.
- Try name, email, phone, or organization name.

Using filters

Common filters include:

- Organization
- Tags or categories
- City / State / Zip
- Status (Active, Inactive, etc.)
- Volunteer status
- Other custom fields your organization has set up

You can usually combine search text with one or more filters to narrow the results.

Building lists

Filtered results can often be used as the basis for mail merges, event invitations, or exports. Save commonly used filters if your version of HelpOne supports saved searches or smart lists.

Tip: If you cannot find someone, try partial names or alternate spellings before creating a new record.
