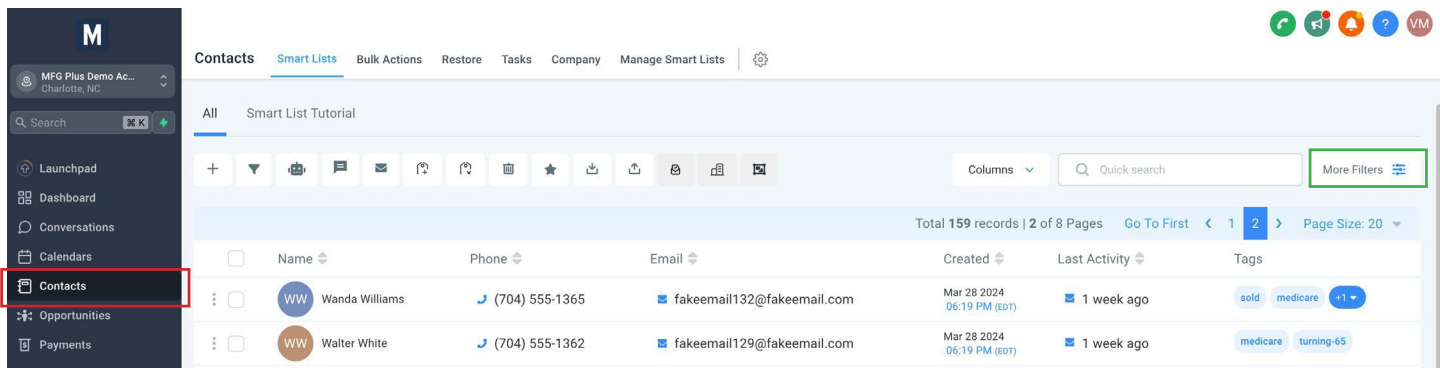


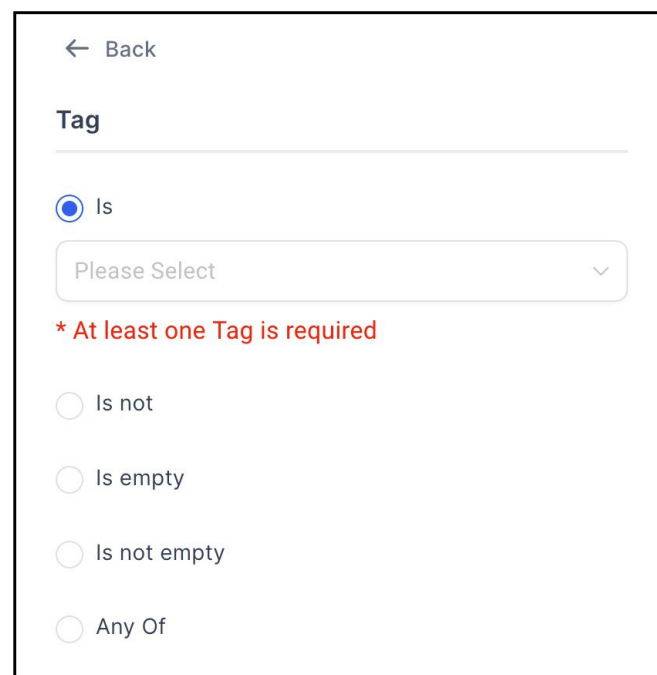
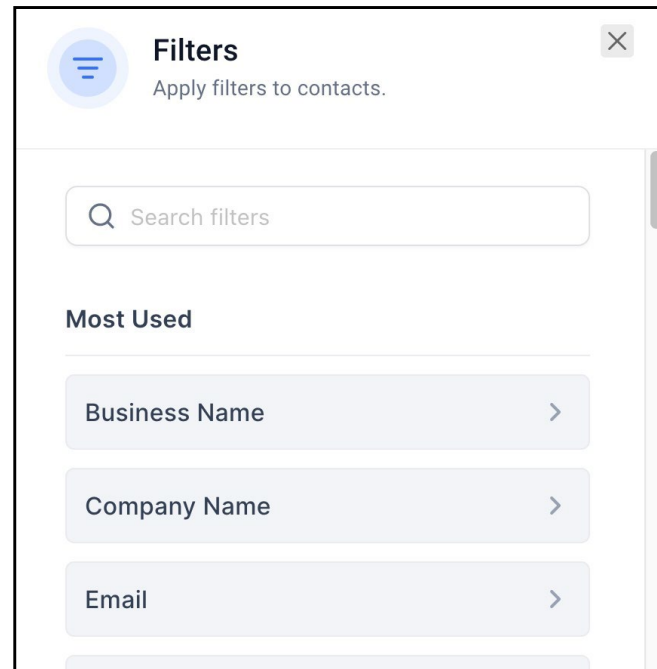
# How to Filter Contacts



1. Navigate to the **Contacts** tab (highlighted above in red).
2. Click **More Filters** in the top right (highlighted above in green). This will open a pop-up menu on the right.
3. Select the variable you would like to filter by. The most common thing to filter by is Tags, which can be applied to contacts manually and by automations.

You can filter by a variety of standard fields, as well as most custom fields you may have created. Scroll through the list of filters to find out what your options are!

4. You can adjust the filter in several ways. Most filters work in a similar manner to the Tag filter, which has been used as an example below.
  - a. Is - Shows all contacts matching the filter you applied.
  - b. Is not - Shows all contacts that do not match the filter.
  - c. Is empty - Shows all contacts where the applied filter's field is empty.
  - d. Is not empty - Shows all contacts where the applied filter's field is filled, regardless of what it's filled with.
  - e. Any of - Choose multiple variables that could be in the filter's field, and show all contacts that have any one of them.
5. Click **Apply** and exit out of the filter window to view your newly filtered list.



By clicking "Save as smart list" before closing the filters window, you can save the filtered list of contacts as a Smart List, which will dynamically update to include all contacts that match the saved filters.

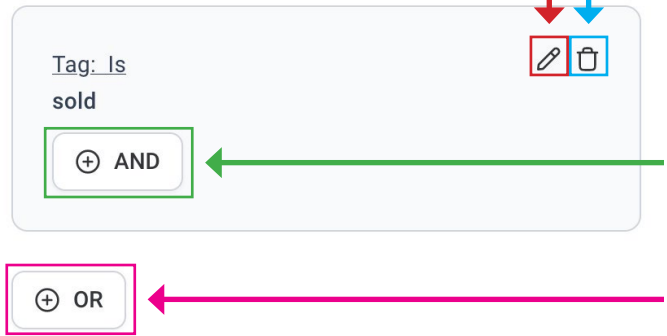
6. To use more than one filter, after clicking “apply”, you can add another filter in one of two ways.

- a. And - Filter 1 and Filter 2 both apply to the contact (marked in green on the right).
- b. Or - At least one of Filter 1 or Filter 2 apply to the contact (marked in pink on the right).

7. To modify filters after you’ve applied them, click the pencil icon on the filter you want to edit (marked in orange on the right).

8. To delete a filter, click the trashcan icon on the filter you want to remove (marked in blue on the right), or click Clear all filters to remove every currently applied filter.

✕ Clear all filters

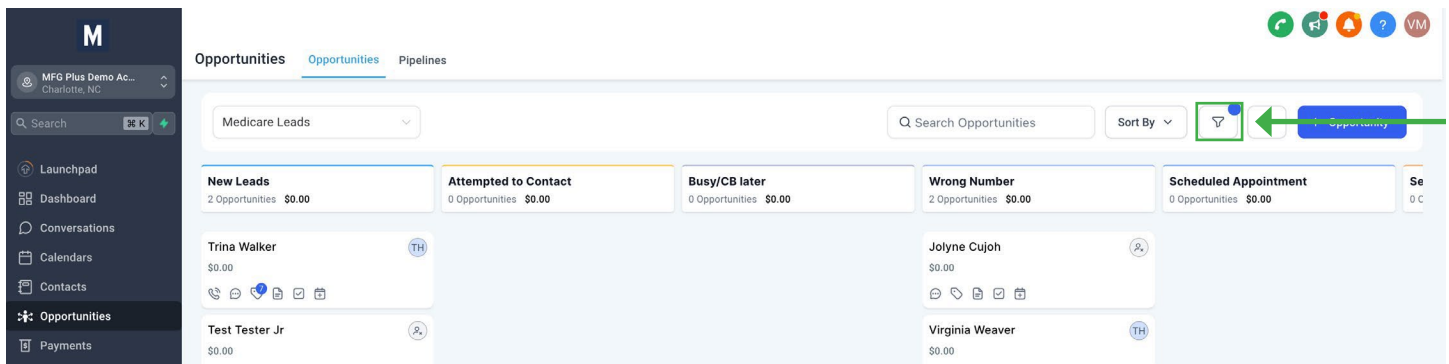
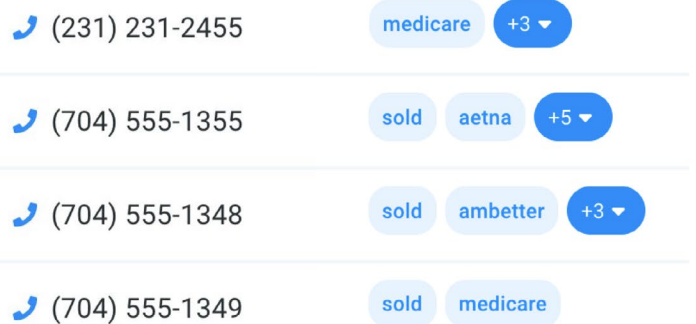


**See the examples below of the difference in results with different filters.**

[Tag Is “sold” AND Phone Is Not “704”]



[Tag Is “sold”] OR [Phone Is Not “704”]



9. Filters can also be used in the Opportunities section. By default, the Opportunities are already filtered by Status, set to “Open.” To remove this filter and to add new filters, click on the filter button, two to the left of the “+ Opportunity” button (highlighted above in green).

10. Filters in the Opportunities section work just like in the Contacts section, with fewer options. If you know you’ve filtered your opportunities correctly or searched a name and nothing has come up, make sure you’ve scrolled horizontally and seen everything, as some stages go far off the screen and must be scrolled to be seen in full. You can also click and drag in empty space to move the screen along.