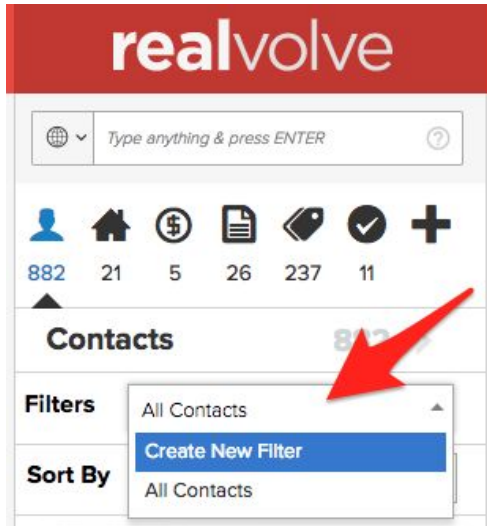


Filtering Contacts

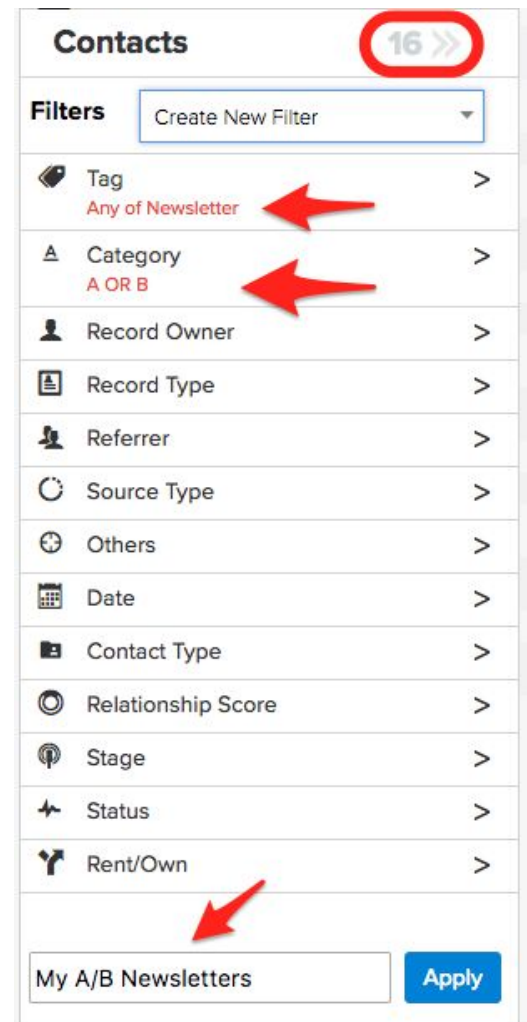
Basics: All Users

On the left side of the screen, just below the section title “**Contacts**” is the Filters section. The



drop-down menu of the filter allows filters to be created or use previously created filters to limit which contact records are viewed. Select “**Create New Filter**” to access the filter options from the drop-down menu such as Tag, Category, Record Owner, Record Type, Referrer, Source Type, Others, Date, Contact Type, Relationship Score, Stage, Status, and Rent/Own. Any combination of filters can be selected and saved for future use.

The selected criteria is displayed in RED below the filter type and the count of records matching the filter criteria is shown above the drop-down menu. Click on the “>>” chevrons to view the filtered records. Enter a filter name then click [Apply] to save the filter criteria for future use.



Filter Types

- **Tags** - Any / All / No - Use the options located at the top of the popup list to search for contacts that have "**Any**" combination of the selected tags, "**All**" the selected tags must be assigned, or "**No**" where the only contacts shown are ones that don't have the selected tags. The "Any" option is usually represented with the word "or", where contacts can have "Tag1" or "Tag2" or Tag3". As long as a contact has any of the three selected tags, it will be displayed in the list. The "All" option is like the word "and", where contacts have to have "Tag1" and "Tag2" in order to qualify.

- **Category** - [A|B|C|D] - This filter allows you to search for contacts with any category combination of A,B,C or D
- **Record Owner** - View just those contacts that are owned by the selected users.
- **Record Type** - View just Person or Company contacts.
- **Referrer** - Enter a contact name using this filter to display all contacts in the database that was referred by this person.
- **Source Type** - View contacts that came from specific sources.
- **Others** - Used to find contacts that are missing information in Email, Address and Tags.
- **Date** - Search by Birth date, Anniversary, Last Call, Last Visit or Last Note
- **Contact Type** - Search by the types Client, Agent, Farm, Personal, or Vendor, Prospect or Hidden
- **Relationship Score** - Select the relationship score range to view
- **Stage** - Filter by the stages of Aware, Know, Like, or Trust
- **Status** - Filter by the statuses Suspect, Prospect, Lead, Client, or Past Client
- **Rent/Own** - Filter by Rent or Own

How to Filter Contacts: [SEE VIDEO](#)

If you have any questions, please contact us at: support@realvolve.com

Questions?

Please direct questions and comments to support@realvolve.com.

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