

Searching and Filtering Options

Find a contact you need quickly and easily with search and filters. You can use any of these features independently, or you can combine them.

1. Begin to **search** for a contact so that the **Filter** option will appear; select **Filter**.
2. Select **Add Filter** to narrow results by Alias, Credentials, Department, Location, Market, Specialty, Title, or Type.
3. Continue to add as many additional filters as needed.
4. Click **Save** once all filters have been selected.
5. Name the new filter so that it can be used easily in the future.
6. When finished, click **Save**.
7. The **filter** will appear under the search bar when in use.
8. When the filter is not needed, **click** the filter; **toggle** the saved filter off.

