



Contacts & Individuals

Contact

There are three main contact types in Virtuous CRM+.

It helps to think of a Contact as an **"entity"** for tax purposes.

HOUSEHOLD

ORGANIZATION

FOUNDATION

How will records appear?

Individuals will "live" at the Contact level in your database.

ORGANIZATION Contact

HOUSEHOLD Contact

FOUNDATION Contact

Custom Contact Types:

If you need types beyond the main 3, you can create them.

Example: churches



Remember:

Contacts can be marked with **Tags** and Individuals can be connected with **Relationships**.

(see below for more)

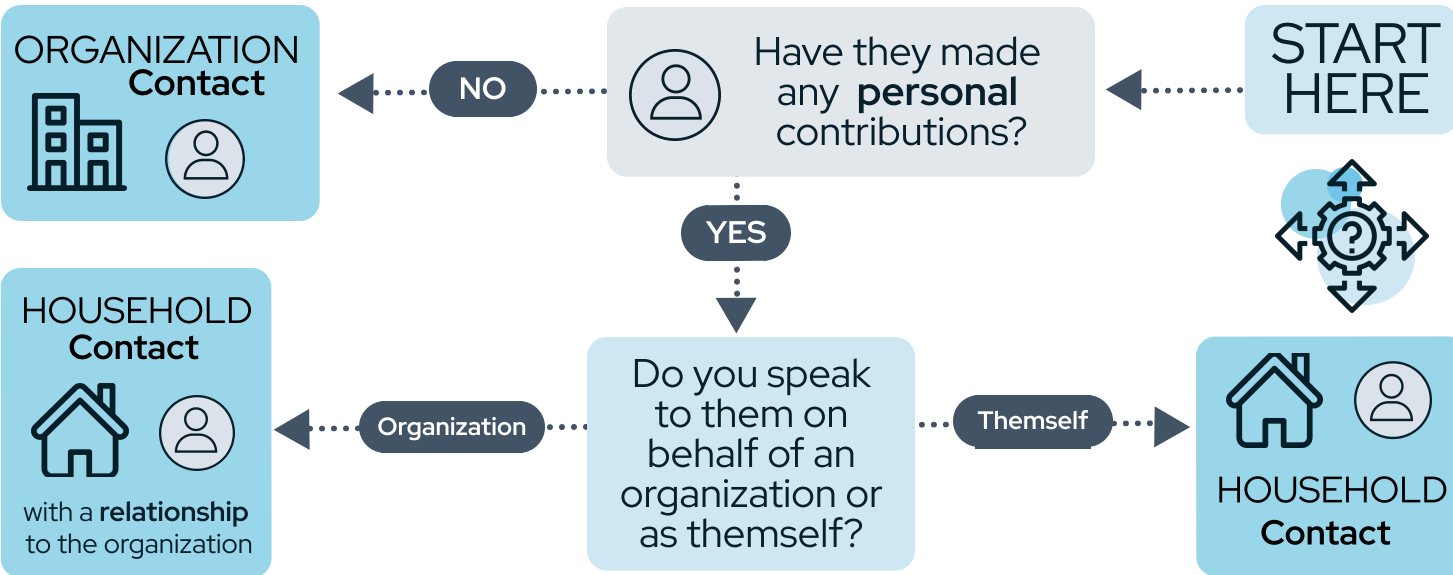


Individual

A person who is a:

- member of a **Household**
- employee or staff of an **Organization** or **Foundation**

How do I decide where a new INDIVIDUAL goes?



What do I need to create a **Foundation** or an **Organization**?

Do you have the first and last name of an individual as your point of contact?

NO

YES

Create a **placeholder** for the Individual, such as:

"Friend of (Name of Your Organization)"

You're all set!



What are **Tags**?

A Contact-based marker for **tracking** segments and preferences.

Ex. "Do Not Mail"



What are **Relationships**?

A way to **connect** two records together, that always have an inverse—such as:

Employer-to-Employee
Spouse-to-Spouse
(can also be custom)



For more product help:
support.virtuous.org

