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

In order to create a **CONTACT**, you must have at least one **INDIVIDUAL.**

Individual

A person who is a:

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

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)

How will records appear?

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

ORGANIZATION **Contact**

HOUSEHOLD **Contact**

FOUNDATION **Contact**

How do I decide where a new **INDIVIDUAL** goes?

START HERE

Have they made any **personal** contributions?

- NO → ORGANIZATION **Contact**
- YES → Do you speak to them on behalf of an organization or as themself?
  - Organization → HOUSEHOLD **Contact** with a **relationship** to the organization
  - Themself → HOUSEHOLD **Contact**

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 → Create a **placeholder** for the Individual, such as: "Friend of (Name of Your Organization)" → You're all set!
- YES → 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

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