



Primary Navigation

PRO TIP: Toggle the arrow at the top of the Primary Navigation bar to keep the menu open.



DASHBOARD

- CRM+ Dashboard (Widgets, Tasks, & Best Calls)

GIFTS

- All Gifts
- **Import Gifts**
- Gift Ask Pipeline
- Grants
- Projects
- Premiums
- Receipting
- Tributes

AUTOMATION

- Workflows
- Template Library

REPORTS

- Reports Page—to create, schedule, and run reports

SETTINGS

- All Settings
- Design Settings
- Data Customization
- Data Management
- Organization Settings & Groups
- Manage Tags
- Team Settings
- **Bulk Data Tools**

IMPORT TOOL

- Gift & Contact Import Tool

DATA HEALTH

- Data Health tools
- Duplicates and Merge Tools



Feeling Lost? You can always click the Virtuous logo to get back your the **DASHBOARD** from any screen.

CONTACTS

- All Contacts
- Add New Contact
- **Import Contacts**
- Organization Groups
- Memberships
- Volunteering

MARKETING

- Dashboard
- Campaigns
- Letters on Demand*
- Responsive Listener
- Email
- Forms
- SMS*

ONLINE GIVING

- Dashboard
- Forms
- Donor Portal

EVENTS

- Events Page—to create, download, and view events

QUERY TOOL

- Query Tool—new & saved
- Also found in Quick Actions



PRO TIP: Look for the stack icon at the bottom of the menu to find **Virtuous Raise**, **Virtuous Volunteer**, and **Virtuous Connect**.

*Letters on Demand and SMS features available through subscription.



Action Bar

The **ACTION BAR** is located in the TOP RIGHT of your screen, next to your avatar.



ADD NEW CONTACT



CONTACT QUEUE



TASKS



HELP

- Virtuous Academy
- Support Articles
- Product Roadmap
- Featured Resources
- **Support Tickets & Help Chat**

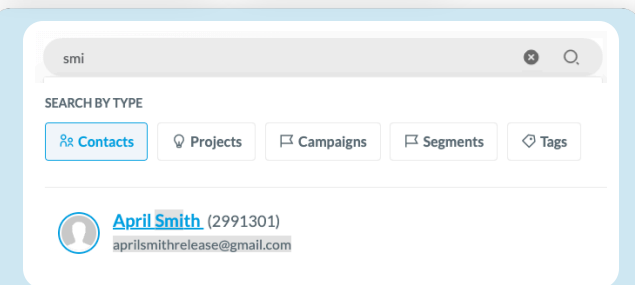


QUICK ACTIONS

Fully customizable menu tab with up to 6 easy to access shortcuts for your most frequently used tools in Virtuous CRM+.

- Automation
- All Gifts
- Projects
- All Contacts
- Campaigns
- Query Tool

[Edit Quick Actions](#)



PRO TIP: Use the **Quick Search** bar at the top of the screen to view recent search results or to **search by type**. Just begin typing, and the search bar will start suggesting possible matches that can be filtered.

