Guidelines for adding non-donor contacts:

Adding non-donor contacts to help you track communications and potential support with those individuals and churches or companies not already established in your organizational group. Please note, for existing staff, some contacts may already exist in your organizational group but have lapsed several years in supporting you. Please review your Virtuous contacts before sending information for us to add them again.

* Do not send existing staff members’ information, we already have them in the system. If you would like for them to be added to your viewing group for tracking contact, please send that request separately.
* Please ensure we have complete contact information. At this time, we will not be creating contact records with names only. We need at least the donor’s first and last name and address or email address to create a new record in Virtuous. The more information, the better.
* If you are updating existing contact records information, for example their address or phone number, please send that information separately.
* For churches or organizations, please also include the main contact person if you have one.

Format for sending new contact records. Complete in an excel document:

Columns should be as follows.

1. Title (Mr. or Mrs. or Miss or Ms. For married couples list Mr. and Mrs.)
2. First name of primary contact (for married couples, list spouse in separate column. Our system listed husbands as primary contacts first.)

* For churches or businesses list name of organization and in spouse column list first name of primary contact.

1. Spouse name if applicable
2. Last Name
3. Address information should be listed in separate columns, street address, city, state and zip code need to be in individual columns.
4. Primary phone number
5. Primary email
6. Birthday information if you would like to track.

Currently, we are not able to import existing notes into new contact records. You will need to add any notes to the contact records you wish to after new accounts are created. You will use the “Task” function to add notes.