Individual Constituent Entry Checklist

Remember these fields when adding a new Individual constituent to the CRM

- ○ Full Last Name
- ○ Full First Name
- ○ Preferred Name
- ○ Preferred Address type
- ○ Address lines (street address
  apt #/unit/suite)
- ○ City
- ○ State
- ○ ZIP
- ○ Preferred Phone (if applicable)
- ○ Preferred Email (if applicable)
- ○ Attribute (Donor, Board Member, Prospect, Volunteer)