How to add a new contact

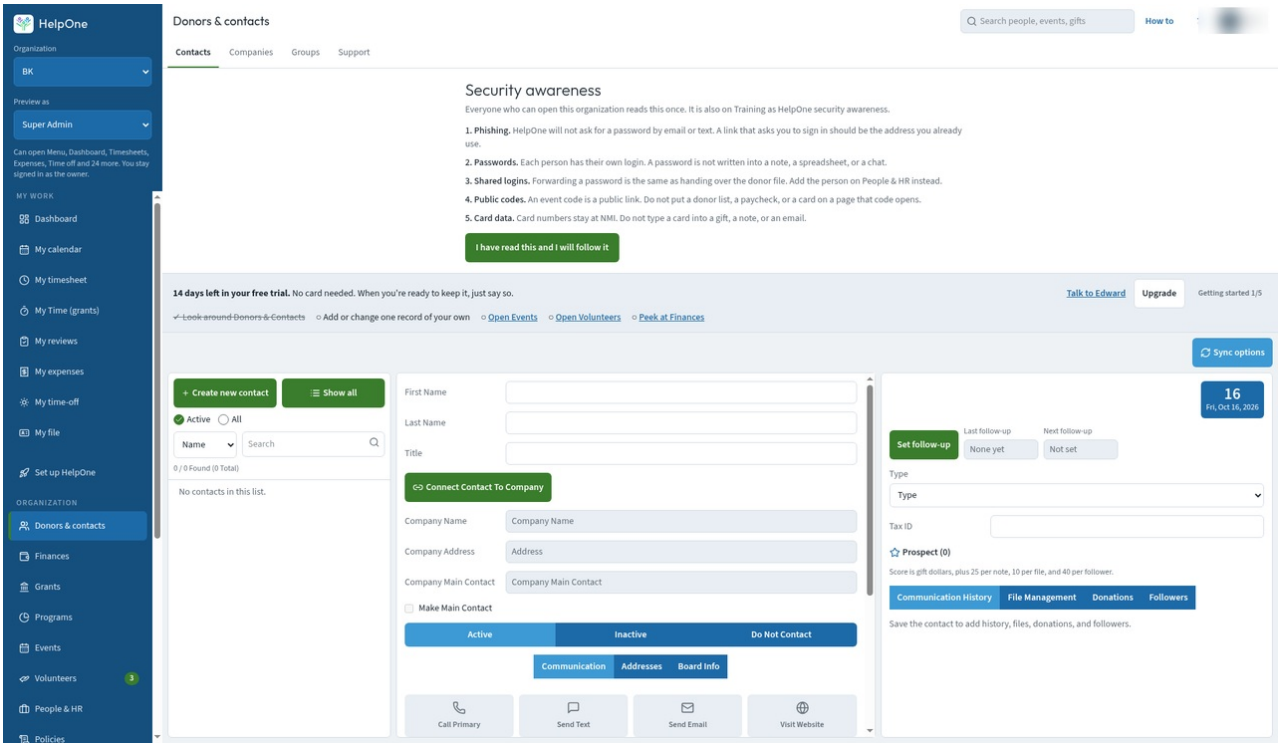
Last Modified on 10/16/2026 7:01 am EDT

Before you begin

Search for the person first so you don't create a duplicate.

Add a contact

1. In the sidebar, go to Donors & contacts.
2. On the Contacts tab, click Create new contact.
3. Enter First Name, Last Name, and Title.
4. Under Communication, add Primary Phone, Email, and any other details you have. Check Receives Texts if they're OK with texts.
5. Use the Addresses tab for their address.
6. Set the status: Active, Inactive, or Do Not Contact.
7. Save the contact.



Once saved, the lower sections fill in over time: Communication History, File Management, Donations, and Followers.

Tip: Click Set follow-up to put a reminder on your calendar.