|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| First Name\* | |  | | | | | | | |
| Middle Name | |  | | | | | | | |
| Last Name\* | |  | | | | | | | |
| Prefix / Suffix | |  | |  | | | | | | |  |
| City/State/Zip\* | |  | | | | | | | |
| Phone # | |  | | | Phone Type | | Choose an item. | | |
| Email | |  | | | | | | | |
|  | | | | | | | | | |
| Spouse First Name | |  | Spouse Last Name | | |  | | Spouse Prefix / Suffix |  |
| Relationships (Other) |  | | | | | | | | |

Individual Record Addition *\*Mandatory Fields*

Organization Record Addition *\*Mandatory Fields*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Organization Name\* |  | | | | | | | | | |
| City/State/Zip\* |  | | | | | | | | | |
| Phone # |  | | | | | | Phone Type | Choose an item. | | |
| Email |  | | | | | | | | | |
| Links |  | | | | | | | | | |
| Fax # |  | | | | | |
| Is this Organization a\* | | Choose an item. | | Organization Relationship Name | | | | |  | |
|  | | | | | | | | | | |
| Individual Relationship Name\* |  | | | | Individual Relationship Title\* | | |  | | | |
| Individual Relationship Type\* | Choose an item. | | | | Hint: CEO, President, Founder, etc. are Primary Contacts. Sales Associates, Grant Specialists, Managers can be Regional Contacts, Grant Contacts, Fundraising Event Contact, etc. | | | | | | |
| Is this Individual Relationship a Contact for the Organization?\* | | | Choose an item. | | |  | | | |  | |

Individual Record Changes *\*Mandatory Fields*

|  |  |
| --- | --- |
| Constituent ID#\* |  |
| Constituent Name\* |  | |
| Changes/Additions to Record\* |  | |
|  |  | |  |  |
|  |  | |

Organization Record Changes *\*Mandatory Fields*

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Constituent ID #\* |  | | | | | | | | |
| Organization Name\* |  | | | | | | | | |
| Record Changes – fill in all that apply | | | | | | | | | |
| Is this Organization a | | Choose an item. | | Organization Relationship Name | | | |  | |
|  | | | | | | | | | |
| Individual Relationship Name\* |  | | | | Individual Relationship Title\* | |  | | | |
| Individual Relationship Type\* | Choose an item. | | | | Hint: CEO, President, Founder, etc. are Primary Contacts. Sales Associates, Grant Specialists, Managers can be Regional Contacts, Grant Contacts, Fundraising Event Contact, etc. | | | | | |
| Is this Individual Relationship a Contact for the Organization?\* | | | Choose an item. | | | Are they replacing an existing Contact relationship, if yes who?\* | | |  | |

|  |  |
| --- | --- |
| Changes/Additions to Record\* |  |
|  |  |