

The Virtuous Platform

Virtuous is adding new features and service offering every month. The following list is not comprehensive but represents our core offering.

Virtuous CRM

CRM is a web-based software platform that allows nonprofits to manage relationships with constituents and donors. CRM includes traditional donor management features like contact management, notes, and gift entry, along with the following feature sets

Contact Management

Donor Tagging, Donor Householding, Donor Relationship Tracking, Seasonal Address Handling, Donor Geo-Location Mapping, Personalized Donor Email Templates, Communication Activity Tracking, Change Log Tracking, Chapter Support with Data Permissioning, Major Donor Portfolio Management, Donor Profile Dashboards/Metrics, Call Center/Screen Pop Support, Membership Management

Gift Management

Split Gifts across projects/funds, Gift Attribution, Pass Through and Soft Credits, Recurring Gift Management, Planned Giving, Premium Management, Pledge Management, Tracking of Peer to Peer Influenced Giving

Major Donor Pipeline/Opportunity Management

Filterable Deal Boards, Gift Asks/Opp Management with Pipeline Status, Major Gift Forecasting, Team and Fund/Project Filtering

Data Health

Data Deduplication, Address and Phone Number Clean Up, NCOA Data Appends, Configurable Auto-Formatting for Informal Names and Mail Label Names

Gift Entry and Import Tools

Bulk data import and batching with complex matching, Check and device scanning support, Import and Data Update Tools with Field Mapping, API integrations

Event Management

Invitation Management, Eventbrite Integration

Volunteer

Volunteer Opportunity Tracking, Volunteer Hours Tracking

Task Management

Team Task Assignments and Filtering, Auto-Generating Tasks Based on Donor Behavior, Mobile and Email Alerts

Queries and Filters

Robust Data Query Tool, saved and Favorited Queries, Full CSV Exports of Results, Best Practice Queries, Take actions on query results

Custom Reporting

Custom Report Builder with Built in Graphs and Visualizations, Team Report Sharing

Custom Fields and Custom Entities

Attach Custom Fields to Any Core Virtuous Data Object, Create One to Many Custom Data Entities, Query and Report on Custom Entities/Fields

Customizable Dashboards and Best Practice Reports

User Selectable Dashboard Widgets, Customizable Dashboard Widgets, Standard Built-In Reports Based on Fundraising Best Practices

Permissions

Role-Based Permissioning Controlled by Organizations Admin, Create Role-Based Groups, Allow/Deny Access to All App Features, Allow/Deny Access Based on Chapter or Donor Ownership, Allow/Deny Access Based on Fund/Project Even Across Split Gifts, Single Sign On through Google or Microsoft 365, Multi-Factor Authentication

Grants

Create incoming and outgoing grant applications, Track grant related documents, Create tasks and reminders for grant application steps, Re-use applications and tasks as templates for new Grants

Projects (Funds)

Manage your projects for fund designations, Monitor key giving metrics, goals & impact foreach project, Map projects to fund codes in accounting, Create sub projects and assign project ownership, Generate project statements, Allocate a % of giving to an associated project, Tie pictures and updates to a project for donor communication, Project Gift assignments

Receipting

Create and Use Direct Mail (PDF) and Email Receipt Templates, Create segmentation for complex receipt runs, Re-generate receipts from a donor's record, Override custom acknowledgments and receipts at the gift level, Generate custom year end giving statements

Outlook and Gmail Integration

Log sent emails as notes

Virtuous Marketing

Marketing is a software platform designed for multi-channel donor and constituent communication. Marketing is fully integrated with CRM data for easy segmentation and campaign execution. The platform includes.

Email Marketing Platform

Build Email Marketing emails with a drag and drop builder, Schedule future email sends, Merge in any field from your CRM, A/B Split Test Emails, Use filters for robust email segmentation, Select from pre-built templates, Track opens and clicks down to the donor level, Subscriber list management

Pixel/Listener

Track web visits using cookies connected to donor donor data, Auto-tag donors based on web engagement, Automate follow up based on web visits

Forms

Drag and Drop Form Builder for Lead, Volunteer and Email Subscription Forms, Automate follow up based on form fills

Campaigns/Segmentation

Track giving based on campaign, channel, source, media outlet/ad, etc, Mail/email segmentation, Radio/media tracking, ROI tracking, Task management, Creative (PDF/image) management

NOTE**Email Pricing**

Subscriptions come with a base amount of monthly emails. Additional emails can be purchased based on usage needs.

Virtuous Automation

Automation lets you build sequences that connect with every donor in real time, with no additional staff time required. Craft unique, personalized communications for each donor, automatically send

data-driven messages in real time, dynamically assign the best tasks or calls to your team, offload back-office tasks, track activity and engagement, and respond in real time. Automation features include:

Automation Workflow builder, Email automation, SMS Message Automation, Data updates, Letters on Demand, Major Donor Cultivation, Task automation, Portfolio/Chapter Automation, Pre-Built best practice workflows

Multi-Channel Fundraising through Automation

Letters on Demand

Send letters and post cards automatically without ever touching a piece of paper. Use personalized templates for birthday, gift acknowledgment, or other key donor events. Virtuous will print and send the letter in real time driven by your data

SMS Automation

Automate SMS messages for program updates, gift follow up, or other key donor behavior

SMS and Letters on Demand Pricing

Subscriptions come with a limited amount of free SMS messages and letter/postcards. Additional SMS messages, letters, and postcards can be purchased based on usage needs.

Virtuous Signals

Signals allows you to listen to donors, synthesize relevant data, and access actionable insights to help retain donors and extend engagement. Signals features include:

Donor Scoring and Analytics, Social Media Integration, AI-Driven Dynamic Gift Arrays, Suggested Gift Asks and Smart Recommendations, Best next call report, Pre-Lapsed predictors

Optional Data Appends (priced separately)

- Wealth data via DonorSearch
- Demographic, employment, contact info and social media appends

Virtuous Giving

Giving allows you to create frictionless, responsive online giving experiences that remind donors of their individual impact. Ensure that each ask is personalized to the donor's motivations and that no donation goes unnoticed. Features include:

Embeddable Online Giving Forms, Drag and Drop Form Builder, Custom Lead and Subscription Forms, Dynamic Gift Arrays, Custom Form Styling, Stock Gifts, Enterprise Security, Corporate Matching, Donor Pays Fees, Custom URL attribution, Donor Portal

RaiseDonors Enterprise Giving (Optional)

RaiseDonors is the Virtuous Giving platform for larger and more complex organizations with unique or custom online giving needs. The RaiseDonors platform includes

- Customizable Donation/Campaign Landing Pages
- Dynamic Project and Goal-Based Giving Landing Pages
- Donation Entry Terminal for Phone-Based Campaigns
- Payment Processor Flexibility
- Text to Give options

Integrations and API

- 20+ Native Integrations - Virtuous integrates natively with most of your favorite cloud software platforms. You can see a full list here : <https://www.virtuous.org/software/nonprofit-crm/integrations/>
- Free Open API - Our free open, RESTful API allows your technology team to access the full power of Virtuous from other software platforms : <https://api.virtuoussoftware.com/>
- Zapier - The Virtuous Zapier integration allows you to quickly build cloud with 2000+ cloud platforms using drag and drop tools for syncing Virtuous donations

Mobile Apps

Virtuous' native iOS and Android apps allow you to search and edit donors like the full CRM experience. See your favorite contacts without extra work and then quickly log activities and notes on your phone. Even quickly view each donors social media profiles for quick insights before meetings, create/manage new donors and notes, and see donors nearby on a map