Salesforce to Virtuous CRM+ Mapping

How does my **Salesforce data** change in **Virtuous CRM+**?

This diagram offers a visual overview on how your data is likely to map from Salesforce to CRM+. However, your Salesforce tool set may impact these data and mapping decisions.

KEY:

- = Salesforce Legacy Data
- = how we transform the data
- = corresponding **CRM+** Data

Account Record

Lead → Salesforce **Leads** become CRM+ **Contacts** with a "Prospect" **Tag**.

Account →

Relationship → Relationship

→ **CONTACT**

Contact → A **Contact** will become an **Individual** in CRM+. → **INDIVIDUAL** under Contact

Volunteer Jobs
If you track volunteer activity, **Volunteer Jobs** become **Volunteer Opportunities** in CRM+.

Notes
If **Notes** are entered in Salesforce as a way to track past interactions, they also become **Notes** in CRM+.

Gift Record

Designations
General Accounting Units (GAUs) or **Designations** correspond to **Projects** in CRM+.

Soft Credits
The **Opportunity** Contact Role is used to designate Passthrough Givers on Opportunities if their role is 'Soft Credit.'

Opportunity → **GIFT**

If recurring payment not toward a specific amount: → **RECURRING** GIFT and

If commitment toward a specific amount: → and **PLEDGE**

Tributes

Honoree → **TRIBUTE**

Notification Recipient → **ACKNOWLEDGEE**

The Rest

Depending on the purpose of a **Custom Field** in Salesforce, it may be mapped to CRM+-native fields or custom fields on several different objects in Virtuous CRM+.

Custom Fields

If these translate to **Contact**-level data points in Virtuous:
- ORGANIZATION GROUPS
- TAGS
- CUSTOM FIELDS
- CUSTOM COLLECTIONS

If they represent **to-dos**: → TASKS

If they represent **touchpoints**: → CONTACT NOTES

If **event-related**: → EVENTS (ATTENDANCE ON **INDIVIDUAL** RECORDS)

For **miscellaneous contribution information**:

MEMBERSHIPS
OR
PLANNED GIFTS
OR
PREMIUMS

OR

GIFT ASKS
OR
GRANTS

To represent **how funds were raised**:
- CAMPAIGN
- COMMUNICATION
- SEGMENT