eTapestry to Virtuous CRM+ Mapping

How does my **eTap data** change in **CRM+**?

This diagram offers a visual overview on how your data is likely to map from eTapestry to Virtuous CRM+.
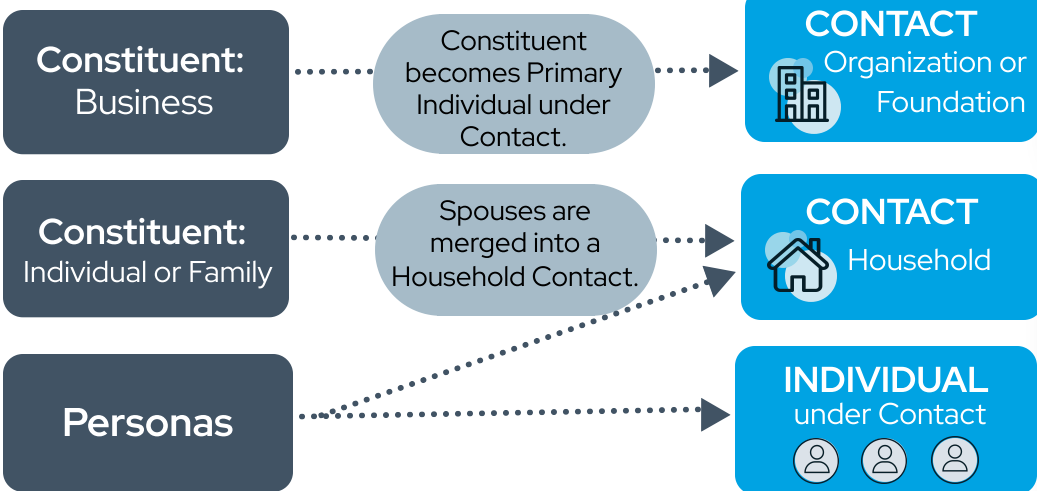
KEY:

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

Constituent Record

Constituent: Business ····· Constituent becomes Primary Individual under Contact. → **CONTACT** Organization or Foundation

Constituent: Individual or Family ····· Spouses are merged into a Household Contact. → **CONTACT** Household

Personas ····· → **INDIVIDUAL** under Contact

Relationships

Relationships in eTap become **Relationships** in CRM+ connecting Contacts and/or Individuals.
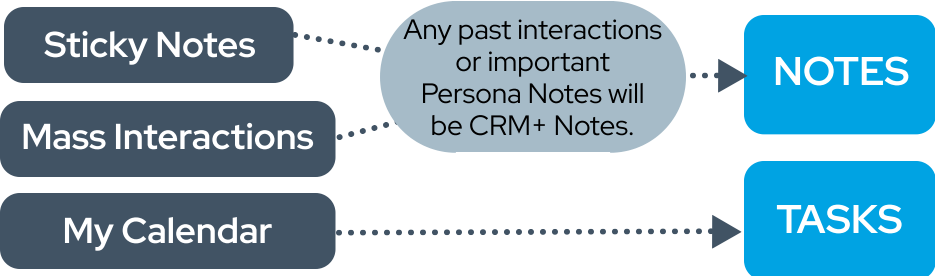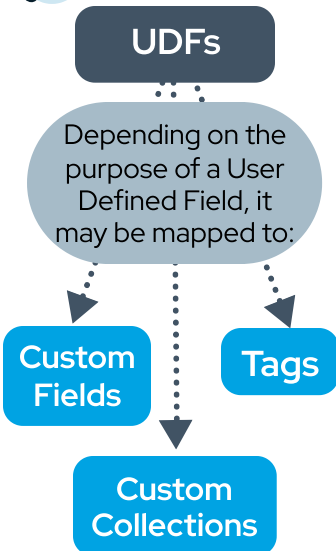
Personas

Personas can either be mapped to create **multiple addresses added under separate Contact records** in CRM+ or may create **additional Individuals** grouped under a Contact.
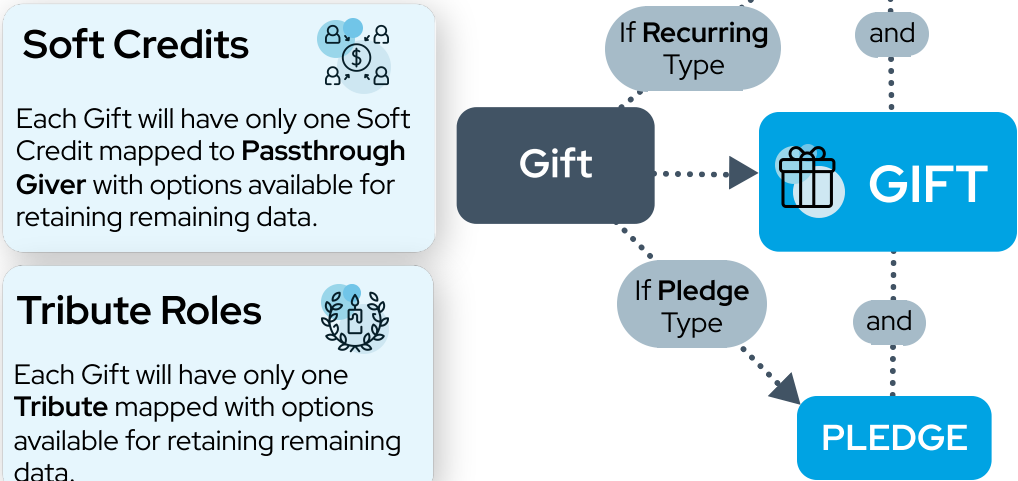
Interactions

Sticky Notes ····· Any past interactions or important Persona Notes will be CRM+ Notes. → **NOTES**

Mass Interactions ·····

My Calendar ····· → **TASKS**

UDFs

UDFs Depending on the purpose of a User Defined Field, it may be mapped to:

→ **Custom Fields**
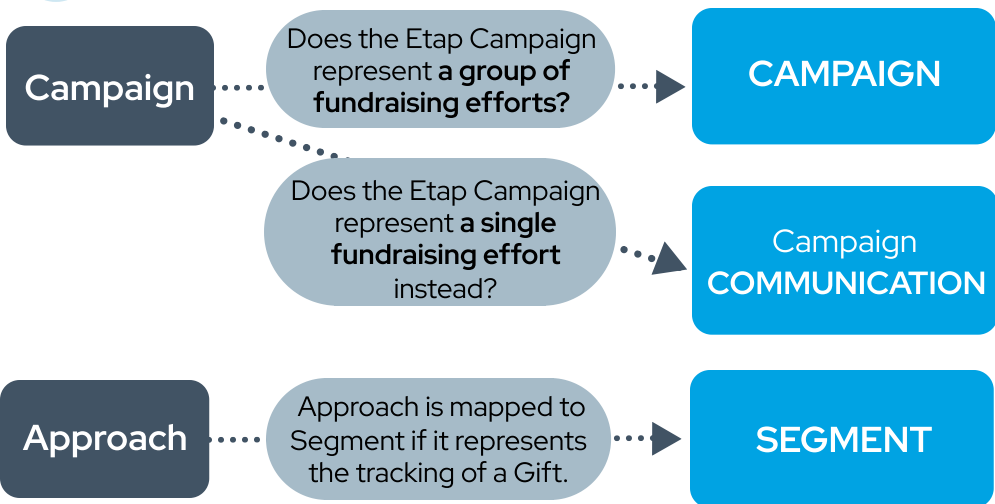
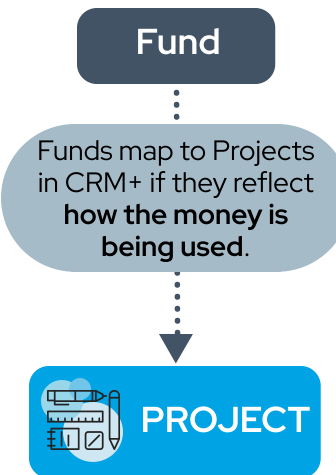→ **Tags**

→ **Custom Collections**

Events and Volunteering

Event- and Volunteer-related UDFs are mapped to **Event Attendance** and **Volunteer Opportunities**, respectively on the Individual record.

Journal Entry Record

Soft Credits

Each Gift will have only one Soft Credit mapped to **Passthrough Giver** with options available for retaining remaining data.

Tribute Roles

Each Gift will have only one **Tribute** mapped with options available for retaining remaining data.

Gift → If **Recurring** Type → **RECURRING GIFT** and **GIFT**

Gift → **GIFT** → If **Pledge** Type → and → **PLEDGE**

Campaign Record

Campaign ····· Does the Etap Campaign represent **a group of fundraising efforts?** → **CAMPAIGN**

····· Does the Etap Campaign represent **a single fundraising effort** instead? → Campaign **COMMUNICATION**

Approach ····· Approach is mapped to Segment if it represents the tracking of a Gift. → **SEGMENT**

Fund

Fund Funds map to Projects in CRM+ if they reflect **how the money is being used**. → **PROJECT**