



Gifts & Gift Processing



Types of Gifts:

Electronic Funds Transfer (EFT)

Stock

Check

Credit

Other

Cash

Reversing Transaction

Qualified Charitable Distribution

Noncash (gifts in kind)

Cryptocurrency

Two Ways GIFTS Come Into Virtuous CRM+:



Integrated Gift Platform
such as
Virtuous Giving

-OR-

Non-Integrated Giving Platform
via CSV file or
Excel spreadsheet



CAMPAIGNS

(how the funds were raised)

⋮

COMMUNICATIONS

⋮

SEGMENTS

SEGMENT CODE:

attached to gift to track where the money came from

Gift & Contact Import Tool



(all Gift Data is entered through this tool)

PROJECT CODE:

attached to gift to track where/how the money is going to be allocated

PROJECTS

(how the funds were used)

Subproject

Subproject

Subproject



PRO TIP: Be sure to add as much contact information as possible when entering the gift to help CRM+ find the correct match!

What are Passthrough Gifts?



Also known as "**soft credit**," this is when an individual receives credit for a gift, even if it technically comes from another entity.

Some examples include:

- A business owner who donates "through" their company
- Gift from a donor-advised fund

How do I attach a Gift to a Contact?



You can log gifts on an existing contact record by selecting a match or on a new contact by creating them right in the Gift & Contact Import Tool.

What happens with a Recurring Gift?



A recurring gift is a donation (payment) that occurs repeatedly as long as the donor is willing.

The amount, payment schedule and duration are set by the donor.

When a donor makes a **recurring gift the first time**, Virtuous CRM+ will link the new gift with the recurring gift by indicating it as an "ongoing donation."

What is a Tribute?



A tribute is a separate object in Virtuous CRM+ that can be **linked with a gift** in memory or special recognition of someone.



For more product help:
support.virtuous.org

