



# Gifts & Gift Processing



## Types of Gifts:

Cash

Reversing Transaction

Qualified Charitable Distribution

Electronic Funds Transfer (EFT)

Stock

Check

Noncash (gifts in kind)

Credit

Other

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.



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