Bloomerang to Virtuous CRM+ Mapping

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



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

KEY:



Bloomerang Data



how we transform the data

corresponding CRM+ Data

Constituent Record



Constituent also becomes Primary Individual under

CONTACT Organization or Relationships

Contact.

Foundation

Relationships in Bloomerang typically become Relationships in CRM+ to connecting Contacts and/or Individuals.

Constituent: Individual

Spouses are merged into a Household Contact.

CONTACT Household

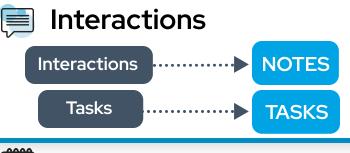




INDIVIDUAL

The Communication Preferences in Bloomerang become **Tags** to categorize and label Contact records in CRM+.









Custom **Field**

> If gift offers privileges for the donor

If activity is a foundation solicitation:

If activity is a major donor solicitation:

on Contact Record

CUSTOM FIELD

on Gift Record

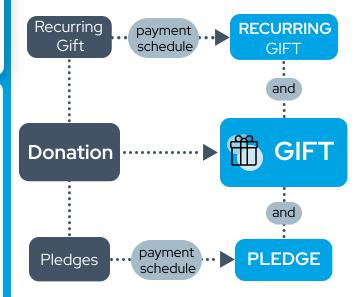
MEMBERSHIP

GRANT

GIFT ASK

Appeal

Gift Record



Soft **Credits**



Tributes



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

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

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

PROJECT



Campaign Record



Specific fundraising efforts in Bloomerang become Communications.

Typically the Appeal name is duplicated to create the CRM+ Segment.

CAMPAIGN

Campaign **COMMUNICATION**

SEGMENT



