DonorPerfect to Virtuous CRM+ Mapping

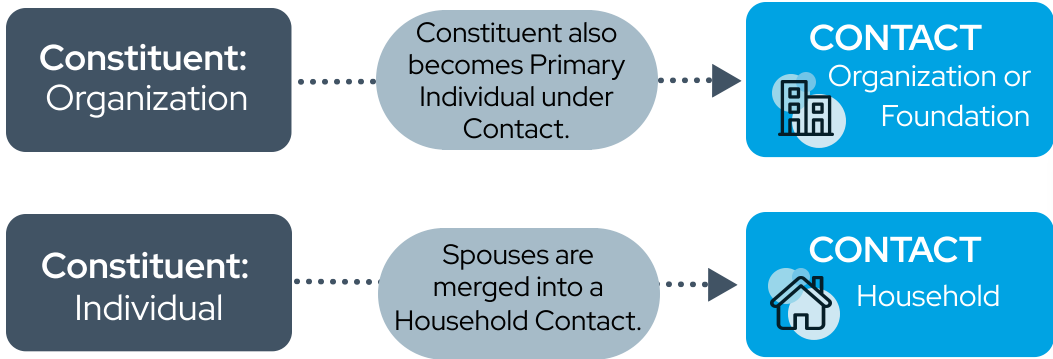## How does my **DP data** change in **CRM+**?

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

KEY:

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

Constituent Record

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

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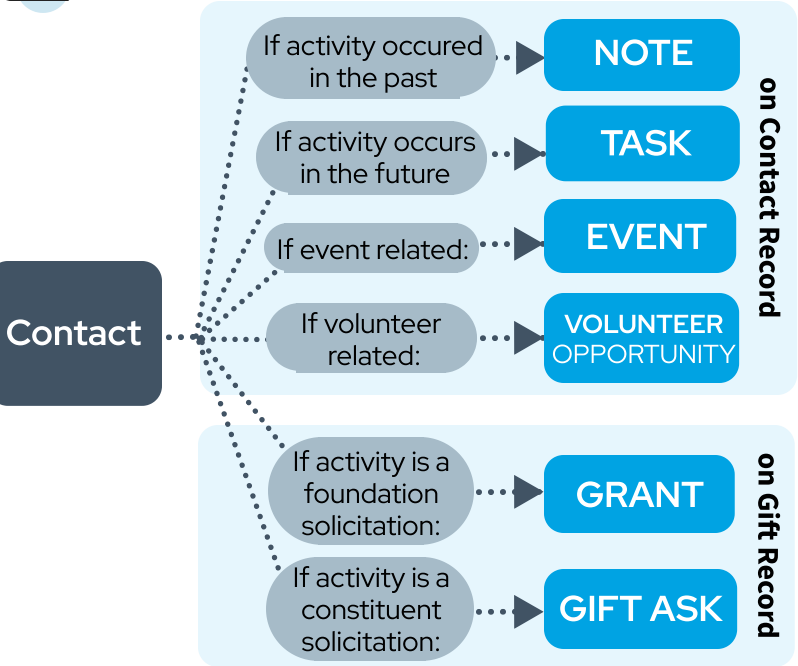
Links

Links in DonorPerfect typically become relationships in CRM+ to connect two records together.
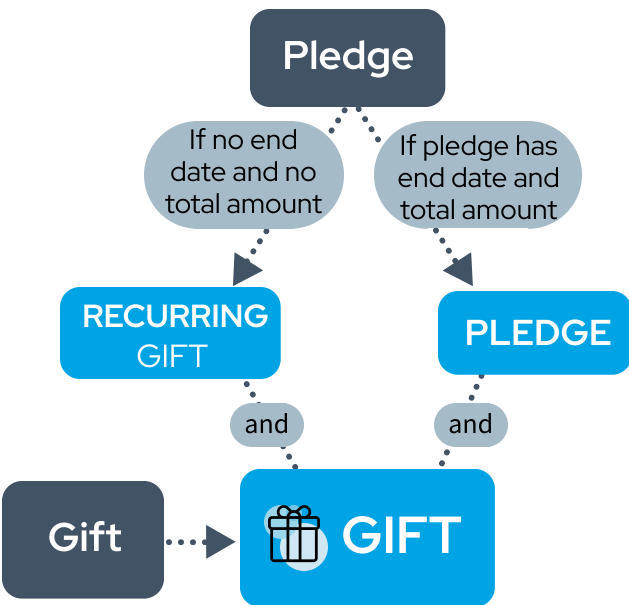
Flags and Custom Fields

Depending on their purpose, Flags and Custom Fields in DonorPerfect will be mapped to either Tags or Custom Fields in CRM+.
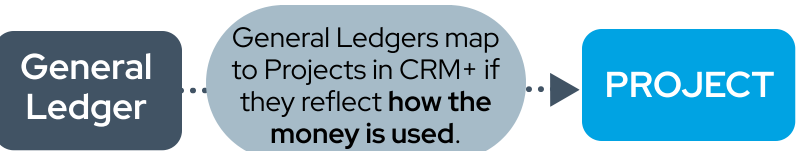
Contact Transactions

Contact

on Contact Record:
- If activity occured in the past → **NOTE**
- If activity occurs in the future → **TASK**
- If event related: → **EVENT**
- If volunteer related: → **VOLUNTEER OPPORTUNITY**

on Gift Record:
- If activity is a foundation solicitation: → **GRANT**
- If activity is a constituent solicitation: → **GIFT ASK**

Gift Record

Pledge
- If no end date and no total amount → **RECURRING GIFT**
- If pledge has end date and total amount → **PLEDGE**

RECURRING GIFT and ···· **GIFT**
PLEDGE and ···· **GIFT**

Gift ····· → **GIFT**

Soft Credits

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

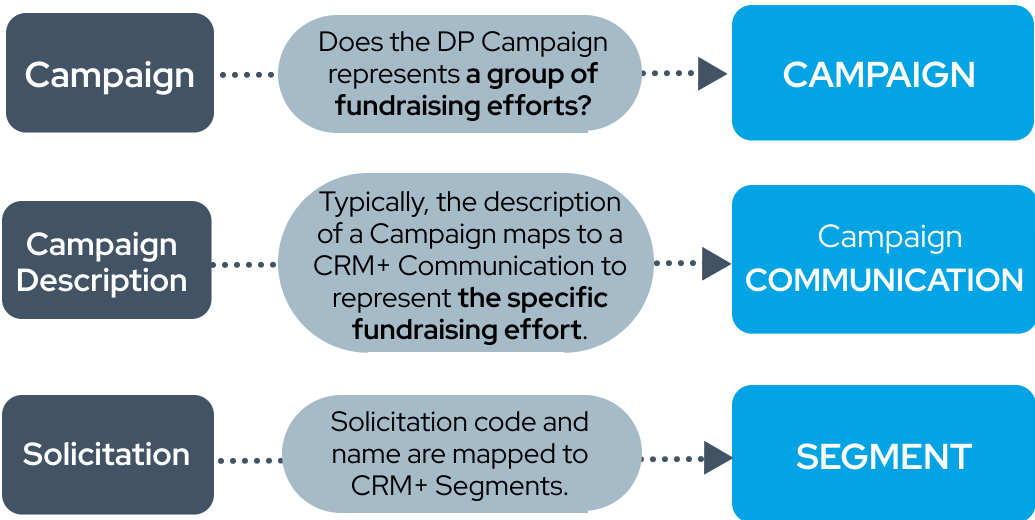### Tributes

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

GL Record

General Ledger ····· General Ledgers map to Projects in CRM+ if they reflect **how the money is used**. → **PROJECT**

Campaign Record

Campaign ····· Does the DP Campaign represents **a group of fundraising efforts?** → **CAMPAIGN**

Campaign Description ····· Typically, the description of a Campaign maps to a CRM+ Communication to represent **the specific fundraising effort**. → Campaign **COMMUNICATION**

Solicitation ····· Solicitation code and name are mapped to CRM+ Segments. → **SEGMENT**

Code Creation

Often times DP Codes do not map one-to-one. To create the Segment Code in CRM+, we typically concatenate the codes from Donor Perfect Campaign, Solicitation, and Subsolicitation.

Sub Solicitations

Because the use of Sub Solicitations in Donor Perfect is less common, they are not often included in the default mapping. If your data includes Sub Solicitations, these will likely map to Segments.

virtuous CRM+

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