

# Kindful to Virtuous CRM+ Mapping

How does my **Kindful** data change in **Virtuous CRM+**?



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

**KEY:**



= Kindful Legacy Data



= how we transform the data



= corresponding CRM+ Data

## Contact Record

**Contact:**  
Organization

The Formal Name becomes the Contact Name in CRM+.

**CONTACT**  
Organization or Foundation

**Contact:**  
Person

**CONTACT**  
Household

Spouses are merged into a Household Contact.

**INDIVIDUAL**  
under Contact

### Related Contacts



Related Contacts in Kindful typically become **Relationships** in CRM+ to connect two records together.

### Communication Preferences



The Communication Preferences on a contact record in Kindful become **Tags** to categorize and label contact records in CRM+.

## On the Contact Record

**Custom Field**

Depending on the purpose of a Custom Field in Kindful, it may be mapped to:

**VOLUNTEER**

**EVENT ATTENDANCE**

**CUSTOM FIELDS**

**Notes**

Note types will be mapped as well.

**NOTES**

## Fund Record

**Fund**

Kindful Funds map to Virtuous Projects if they indicate **how the money is used**. If Designations are used, these will become Projects too.

**PROJECT**

**Designation**

## Gift Record

**Pledge**

If no end date and no total amount

If pledge has end date and total amount

**RECURRING GIFT**

**PLEDGE**

and

and

**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.

## Campaign Record

**Campaign**

Does the Campaign represents a **group of fundraising efforts**?

**CAMPAIGN**

The Campaign Name is typically repeated to create the CRM+ Communication.

**Campaign COMMUNICATION**

The Campaign Short Name typically becomes the Segment in CRM+.

**SEGMENT**

### Matching Gifts



Matching Gifts are typically mapped to a CRM+ Campaign. The matching organization will also receive the soft credit.

### Grant Tracking Campaigns



Rather than using Campaigns to track grants, CRM+ has a **Grant Management** tool to record grant data and link gifts to grants won.

