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

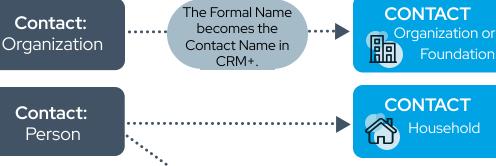


how we transform the data



Related

Se Contact Record



Spouses are merged into a

Household Contact.

Contacts CONTACT Organization or



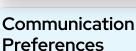
Related Contacts in Kindful typically become Relationships in CRM+ to connect two records together.

CONTACT

INDIVIDUAL

under Contact

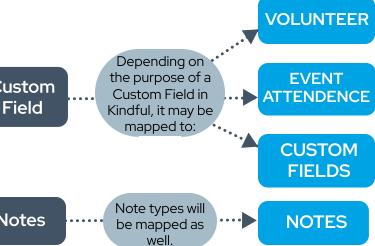
(2)

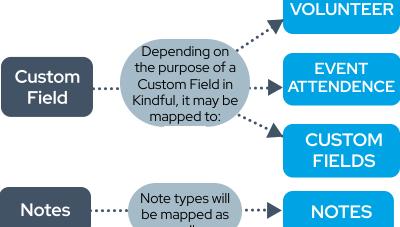


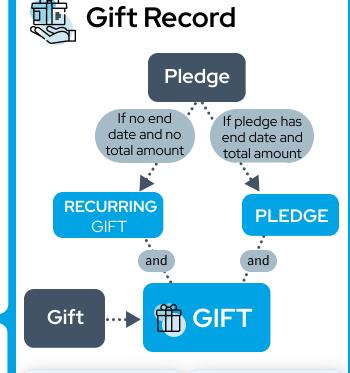


The Communication Preferences on a contact record in Kindful become **Tags** to categorize and label contact records in CRM+.

On the Contact Record







Fund Record



Designation

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

PROJECT

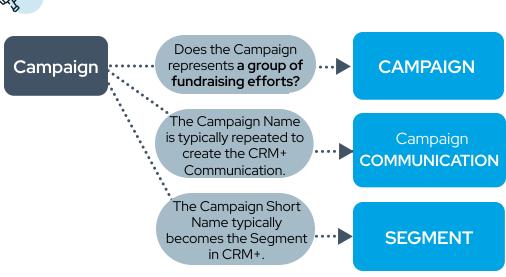
Soft Credits

Tributes



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

Campaign Record



Matching Gifts



Matching Gifts are typically mapped to a CRM+ Campaign. The matching organization will also recieve 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.



