Kindful Glossary

Kindful is different from other nonprofit CRM solutions. We've worked hard to create a system that is easy for nonprofits to use...and easy for them to understand! Rather than using complicated terms, our database works around well-known nonprofit terms and common-sense language.

- **Accounting Integration:** The seamless automatic sync of data between an accounting software and a CRM system. Kindful integrates with QuickBooks.

- **Acknowledgment:** A letter, email or any other avenue by which a nonprofit acknowledge a donation and thanks the donor.

- **Automated Acknowledgment:** Automated tax receipt/ acknowledgment for online donations.

- **Campaign:** An organized effort to raise money for a specific purpose. Campaigns are specific projects that flow into more general funds.

- **Cause:** Peer-to-peer fundraising pages in Kindful.

- **Complete Historical Tracking:** All interactions and communication a constituent has with an organization (donations, events, notes, purchases, email and mail communication).

- **Constituent:** Anyone who is associated with a nonprofit organization. Constituents can be donors, event attendees, email recipients or volunteers - really anyone else who gets entered into the database!

- **Contact Record:** A record in Kindful for an individual constituent.

- **Custom Fields:** Fields created to track additional information unique to an organization (such as volunteer information, prospecting stages, interest and involvement)

- **Deduplication:** The act of merging duplicate records into one unique record.

- **Detailed Donor Profiles:** Detailed contact management, tax summaries, social profile integration and individual historical data.

- **Donor Database:** See nonprofit CRM

- **Duplicate Record:** Multiple entries with the same information (such as contact records and transaction data) within a CRM system.

- **Email Marketing Integration:** The seamless automatic sync of data between an email marketing service and a CRM system. Kindful integrates with Emma and MailChimp.

- **Event Management:** Tracking of event efforts (such as invitations, registrations and follow-up progress) within a CRM system.

- **Fund:** A classification system for categorizing donations and other monies coming into a donor database. Funds are a general allocation made more specific through campaigns.

- **Gift-In-Kind:** A non-monetary donation to a nonprofit (like stock, computers or clothing).

- **Grant Management:** Tracking of grant fundraising efforts (such as application progress, foundation information and reporting progress) within a CRM system.

- **Hard Credit:** CRM designation for an individual or organization who is directly responsible for a nonprofit donation. See soft credit.

- **Household Record:** A record in Kindful that includes multiple contact records that are connected under a family or business relationship.

- **Integration:** The automated sync of data between a third-party service and a nonprofit CRM. Kindful integrates with various email marketing, event management, e-commerce and accounting services. (See the growing list here.)

- **Matching Gift:** A donation that is matched by another gift of the same amount. Many companies will match the donation of an employee to a nonprofit of their choice.

- **NCOA Updates:** Updates made to contact records based on the National Change of Address process

- **Nonprofit CRM:** A constituent relationship management solution specific to nonprofits. (Different from business CRMs, which refer to *customer* relationship management.)

- **Peer-to-Peer Fundraising:** Fundraising initiatives that utilize individuals or groups of individuals to raise funds or awareness for an organization through their social networks.

- **Pledge:** A commitment from a donor to give a certain dollar amount over a specified period of time.

- **Pledge Management:** Tracking complete and incomplete pledges per donor and per campaign

- **Query:** Search parameters used to segment data within a CRM system in order to create a report. Kindful refers to queries as filters.

- **Real Time Activity Feed:** A live-updating account of all activity within the Kindful database. (We tell people it's just like their Facebook feed.)

- **Report:** A compilation of targeted data from a nonprofit CRM. Common reports to know:
  - LYBUNT: Report of donors who gave "last year, but unfortunately not this" year
  - SYBUNT: Report of donors who have "some years, but unfortunately not this" year
  - Lapsed: Report of donors who have a history of giving, but have not donated for a specified number of years.

- **Scheduled Report:** A report that is saved and scheduled to be generated and emailed to a designated recipient at a designated time.

- **Segment:** A subdivided group of constituents based on a specified set of criteria. For example, a large pool of donors can be segmented into a subgroup in a specific location.

- **Snailer:** The Kindful term for constituent communication that is sent via postal mail (such as direct mailings, nonprofit collateral or hard copies of donor receipts).

- **Soft Credit:** CRM designation for an individual or organization who is not directly responsible for a donation but should still be credited and acknowledged. Soft credits can be applied to any donor who has given through another source (like a spouse, employer or foundation). See hard credit.

- **Solicitation:** Any appeal made for a donation whether online, via mailing or in person.

- **Split Transaction:** A donation that is designated to more than one campaign.

- **Task Management:** The ability to assign specific tasks to any user within the Kindful database.

- **Transaction:** Any monetary entry into the Kindful database. This can be created automatically when a donation is made on a Kindful donation page or through manual entry inside the database.

- **Volunteer Management:** Tracking of volunteer-related information (such as hours, interests, programs and roles) within a CRM system for reporting purposes.