Nonprofit Accelerator Entity Reference

Contents

[Account 3](#_Toc528953099)

[Campaign 13](#_Toc528953100)

[Contact 17](#_Toc528953101)

[Address 29](#_Toc528953102)

[Lead 32](#_Toc528953103)

[Award 43](#_Toc528953104)

[Award Version 45](#_Toc528953105)

[Budget 47](#_Toc528953106)

[Contributing Framework 48](#_Toc528953107)

[Credit Plan 50](#_Toc528953108)

[Credit Plan Recipient 51](#_Toc528953109)

[Designated Credit 53](#_Toc528953110)

[Designation 55](#_Toc528953111)

[Designation Plan 57](#_Toc528953112)

[Disbursement Distribution 59](#_Toc528953113)

[Docket 61](#_Toc528953114)

[Donor Commitment 63](#_Toc528953115)

[Education 65](#_Toc528953116)

[Employment History 67](#_Toc528953117)

[Delivery Framework 68](#_Toc528953118)

[Indicator 70](#_Toc528953119)

[Indicator Value 71](#_Toc528953120)

[Objective 73](#_Toc528953121)

[OFAC Match 74](#_Toc528953122)

[Payment Asset 76](#_Toc528953123)

[Payment Method 78](#_Toc528953124)

[Payment Processor 79](#_Toc528953125)

[Payment Schedule 81](#_Toc528953126)

[Planned Giving 83](#_Toc528953127)

[Preference 89](#_Toc528953128)

[Recommendation 91](#_Toc528953129)

[Report 93](#_Toc528953130)

[Request 95](#_Toc528953131)

[Result 97](#_Toc528953132)

[Review 99](#_Toc528953133)

[Salutation 100](#_Toc528953134)

[Transaction 103](#_Toc528953135)

[Opportunity 105](#_Toc528953136)

# Account

An account is a business that represents a donor, potential donor, grant-seeker or grant-maker. For nonprofits, accounts can be Corporations, Companies, Foundations, or Agencies. Many nonprofit CRMs use a concept of "organization" to track company information and primary Contacts at a particular organization who influence giving, awards and/or program delivery. In the case of a business transaction between two companies, the account is the organization that would be billed.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| accountcategorycode | Picklist | Select a category to indicate whether the customer account is standard or preferred. |
| accountcategorycodename | Virtual | N/A |
| accountclassificationcode | Picklist | Select a classification code to indicate the potential value of the customer account based on the projected return on investment, cooperation level, sales cycle length or other criteria. |
| accountclassificationcodename | Virtual | N/A |
| accountid | Uniqueidentifier | Unique identifier of the account. |
| accountnumber | String | Type an ID number or code for the account to quickly search and identify the account in system views. |
| accountratingcode | Picklist | Select a rating to indicate the value of the customer account. |
| accountratingcodename | Virtual | N/A |
| address1\_addressid | Uniqueidentifier | Unique identifier for address 1. |
| address1\_addresstypecode | Picklist | Select the primary address type. |
| address1\_addresstypecodename | Virtual | N/A |
| address1\_city | String | Type the city for the primary address. |
| address1\_composite | Memo | Shows the complete primary address. |
| address1\_country | String | Type the country or region for the primary address. |
| address1\_county | String | Type the county for the primary address. |
| address1\_fax | String | Type the fax number associated with the primary address. |
| address1\_freighttermscode | Picklist | Select the freight terms for the primary address to make sure shipping orders are processed correctly. |
| address1\_freighttermscodename | Virtual | N/A |
| address1\_latitude | Double | Type the latitude value for the primary address for use in mapping and other applications. |
| address1\_line1 | String | Type the first line of the primary address. |
| address1\_line2 | String | Type the second line of the primary address. |
| address1\_line3 | String | Type the third line of the primary address. |
| address1\_longitude | Double | Type the longitude value for the primary address for use in mapping and other applications. |
| address1\_name | String | Type a descriptive name for the primary address, such as Corporate Headquarters. |
| address1\_postalcode | String | Type the ZIP Code or postal code for the primary address. |
| address1\_postofficebox | String | Type the post office box number of the primary address. |
| address1\_primarycontactname | String | Type the name of the main contact at the account's primary address. |
| address1\_shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| address1\_shippingmethodcodename | Virtual | N/A |
| address1\_stateorprovince | String | Type the state or province of the primary address. |
| address1\_telephone1 | String | Type the main phone number associated with the primary address. |
| address1\_telephone2 | String | Type a second phone number associated with the primary address. |
| address1\_telephone3 | String | Type a third phone number associated with the primary address. |
| address1\_upszone | String | Type the UPS zone of the primary address to make sure shipping charges are calculated correctly and deliveries are made promptly, if shipped by UPS. |
| address1\_utcoffset | Integer | Select the time zone, or UTC offset, for this address so that other people can reference it when they contact someone at this address. |
| address2\_addressid | Uniqueidentifier | Unique identifier for address 2. |
| address2\_addresstypecode | Picklist | Select the secondary address type. |
| address2\_addresstypecodename | Virtual | N/A |
| address2\_city | String | Type the city for the secondary address. |
| address2\_composite | Memo | Shows the complete secondary address. |
| address2\_country | String | Type the country or region for the secondary address. |
| address2\_county | String | Type the county for the secondary address. |
| address2\_fax | String | Type the fax number associated with the secondary address. |
| address2\_freighttermscode | Picklist | Select the freight terms for the secondary address to make sure shipping orders are processed correctly. |
| address2\_freighttermscodename | Virtual | N/A |
| address2\_latitude | Double | Type the latitude value for the secondary address for use in mapping and other applications. |
| address2\_line1 | String | Type the first line of the secondary address. |
| address2\_line2 | String | Type the second line of the secondary address. |
| address2\_line3 | String | Type the third line of the secondary address. |
| address2\_longitude | Double | Type the longitude value for the secondary address for use in mapping and other applications. |
| address2\_name | String | Type a descriptive name for the secondary address, such as Corporate Headquarters. |
| address2\_postalcode | String | Type the ZIP Code or postal code for the secondary address. |
| address2\_postofficebox | String | Type the post office box number of the secondary address. |
| address2\_primarycontactname | String | Type the name of the main contact at the account's secondary address. |
| address2\_shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| address2\_shippingmethodcodename | Virtual | N/A |
| address2\_stateorprovince | String | Type the state or province of the secondary address. |
| address2\_telephone1 | String | Type the main phone number associated with the secondary address. |
| address2\_telephone2 | String | Type a second phone number associated with the secondary address. |
| address2\_telephone3 | String | Type a third phone number associated with the secondary address. |
| address2\_upszone | String | Type the UPS zone of the secondary address to make sure shipping charges are calculated correctly and deliveries are made promptly, if shipped by UPS. |
| address2\_utcoffset | Integer | Select the time zone, or UTC offset, for this address so that other people can reference it when they contact someone at this address. |
| aging30 | Money | For system use only. |
| aging30\_base | Money | The base currency equivalent of the aging 30 field. |
| aging60 | Money | For system use only. |
| aging60\_base | Money | The base currency equivalent of the aging 60 field. |
| aging90 | Money | For system use only. |
| aging90\_base | Money | The base currency equivalent of the aging 90 field. |
| businesstypecode | Picklist | Select the legal designation or other business type of the account for contracts or reporting purposes. |
| businesstypecodename | Virtual | N/A |
| createdby | Lookup | Shows who created the record. |
| createdbyexternalparty | Lookup | Shows the external party who created the record. |
| createdbyexternalpartyname | String | N/A |
| createdbyexternalpartyyominame | String | N/A |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Shows the date and time when the record was created. The date and time are displayed in the time zone selected in Microsoft Dynamics 365 options. |
| createdonbehalfby | Lookup | Shows who created the record on behalf of another user. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| creditlimit | Money | Type the credit limit of the account. This is a useful reference when you address invoice and accounting issues with the customer. |
| creditlimit\_base | Money | Shows the credit limit converted to the system's default base currency for reporting purposes. |
| creditonhold | Boolean | Select whether the credit for the account is on hold. This is a useful reference while addressing the invoice and accounting issues with the customer. |
| creditonholdname | Virtual | N/A |
| customersizecode | Picklist | Select the size category or range of the account for segmentation and reporting purposes. |
| customersizecodename | Virtual | N/A |
| customertypecode | Picklist | Select the category that best describes the relationship between the account and your organization. |
| customertypecodename | Virtual | N/A |
| defaultpricelevelid | Lookup | Choose the default price list associated with the account to make sure the correct product prices for this customer are applied in sales opportunities, quotes, and orders. |
| defaultpricelevelidname | String | N/A |
| description | Memo | Type additional information to describe the account, such as an excerpt from the company's website. |
| donotbulkemail | Boolean | Select whether the account allows bulk email sent through campaigns. If Do Not Allow is selected, the account can be added to marketing lists, but is excluded from email. |
| donotbulkemailname | Virtual | N/A |
| donotbulkpostalmail | Boolean | Select whether the account allows bulk postal mail sent through marketing campaigns or quick campaigns. If Do Not Allow is selected, the account can be added to marketing lists, but will be excluded from the postal mail. |
| donotbulkpostalmailname | Virtual | N/A |
| donotemail | Boolean | Select whether the account allows direct email sent from Microsoft Dynamics 365. |
| donotemailname | Virtual | N/A |
| donotfax | Boolean | Select whether the account allows faxes. If Do Not Allow is selected, the account will be excluded from fax activities distributed in marketing campaigns. |
| donotfaxname | Virtual | N/A |
| donotphone | Boolean | Select whether the account allows phone calls. If Do Not Allow is selected, the account will be excluded from phone call activities distributed in marketing campaigns. |
| donotphonename | Virtual | N/A |
| donotpostalmail | Boolean | Select whether the account allows direct mail. If Do Not Allow is selected, the account will be excluded from letter activities distributed in marketing campaigns. |
| donotpostalmailname | Virtual | N/A |
| donotsendmarketingmaterialname | Virtual | N/A |
| donotsendmm | Boolean | Select whether the account accepts marketing materials, such as brochures or catalogs. |
| emailaddress1 | String | Type the primary email address for the account. |
| emailaddress2 | String | Type the secondary email address for the account. |
| emailaddress3 | String | Type an alternate email address for the account. |
| entityimage | Virtual | Shows the default image for the record. |
| entityimage\_timestamp | BigInt | N/A |
| entityimage\_url | String | N/A |
| entityimageid | Uniqueidentifier | For internal use only. |
| exchangerate | Decimal | Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency. |
| fax | String | Type the fax number for the account. |
| followemail | Boolean | Information about whether to allow following email activity like opens, attachment views and link clicks for emails sent to the account. |
| followemailname | Virtual | N/A |
| ftpsiteurl | String | Type the URL for the account's FTP site to enable users to access data and share documents. |
| importsequencenumber | Integer | Unique identifier of the data import or data migration that created this record. |
| industrycode | Picklist | Select the account's primary industry for use in marketing segmentation and demographic analysis. |
| industrycodename | Virtual | N/A |
| isprivate | Boolean | N/A |
| isprivatename | Virtual | N/A |
| lastonholdtime | DateTime | Contains the date and time stamp of the last on hold time. |
| lastusedincampaign | DateTime | Shows the date when the account was last included in a marketing campaign or quick campaign. |
| marketcap | Money | Type the market capitalization of the account to identify the company's equity, used as an indicator in financial performance analysis. |
| marketcap\_base | Money | Shows the market capitalization converted to the system's default base currency. |
| marketingonly | Boolean | Whether is only for marketing |
| marketingonlyname | Virtual | N/A |
| masteraccountidname | String | N/A |
| masteraccountidyominame | String | N/A |
| masterid | Lookup | Shows the master account that the account was merged with. |
| merged | Boolean | Shows whether the account has been merged with another account. |
| mergedname | Virtual | N/A |
| modifiedby | Lookup | Shows who last updated the record. |
| modifiedbyexternalparty | Lookup | Shows the external party who modified the record. |
| modifiedbyexternalpartyname | String | N/A |
| modifiedbyexternalpartyyominame | String | N/A |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Shows the date and time when the record was last updated. The date and time are displayed in the time zone selected in Microsoft Dynamics 365 options. |
| modifiedonbehalfby | Lookup | Shows who created the record on behalf of another user. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_accounttype | Picklist |  |
| msnfp\_accounttypename | Virtual | N/A |
| msnfp\_acquisitiondate | DateTime | Manually populated date indicating when the Account was aquired. |
| msnfp\_acquisitionsource | Picklist | Manually populated field Indicating the lead source for acquiring this Account. |
| msnfp\_acquisitionsourcename | Virtual | N/A |
| msnfp\_primaryconstituenttype | Picklist | Subcategory of primary Constituency type rolls up to this field. |
| msnfp\_primaryconstituenttypename | Virtual | N/A |
| name | String | Type the company or business name. |
| numberofemployees | Integer | Type the number of employees that work at the account for use in marketing segmentation and demographic analysis. |
| onholdtime | Integer | Shows how long, in minutes, that the record was on hold. |
| opendeals | Integer | Number of open opportunities against an account and its child accounts. |
| opendeals\_date | DateTime | Last Updated time of rollup field Open Deals. |
| opendeals\_state | Integer | State of rollup field Open Deals. |
| openrevenue | Money | Sum of open revenue against an account and its child accounts. |
| openrevenue\_base | Money | Value of the Open Revenue in base currency. |
| openrevenue\_date | DateTime | Last Updated time of rollup field Open Revenue. |
| openrevenue\_state | Integer | State of rollup field Open Revenue. |
| originatingleadid | Lookup | Shows the lead that the account was created from if the account was created by converting a lead in Microsoft Dynamics 365. This is used to relate the account to data on the originating lead for use in reporting and analytics. |
| originatingleadidname | String | N/A |
| originatingleadidyominame | String | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Enter the user or team who is assigned to manage the record. This field is updated every time the record is assigned to a different user. |
| owneridname | String | N/A |
| owneridtype | EntityName | N/A |
| owneridyominame | String | N/A |
| ownershipcode | Picklist | Select the account's ownership structure, such as public or private. |
| ownershipcodename | Virtual | N/A |
| owningbusinessunit | Lookup | Shows the business unit that the record owner belongs to. |
| owningteam | Lookup | Unique identifier of the team who owns the account. |
| owninguser | Lookup | Unique identifier of the user who owns the account. |
| parentaccountid | Lookup | Choose the parent account associated with this account to show parent and child businesses in reporting and analytics. |
| parentaccountidname | String | N/A |
| parentaccountidyominame | String | N/A |
| participatesinworkflow | Boolean | For system use only. Legacy Microsoft Dynamics CRM 3.0 workflow data. |
| participatesinworkflowname | Virtual | N/A |
| paymenttermscode | Picklist | Select the payment terms to indicate when the customer needs to pay the total amount. |
| paymenttermscodename | Virtual | N/A |
| preferredappointmentdaycode | Picklist | Select the preferred day of the week for service appointments. |
| preferredappointmentdaycodename | Virtual | N/A |
| preferredappointmenttimecode | Picklist | Select the preferred time of day for service appointments. |
| preferredappointmenttimecodename | Virtual | N/A |
| preferredcontactmethodcode | Picklist | Select the preferred method of contact. |
| preferredcontactmethodcodename | Virtual | N/A |
| preferredequipmentid | Lookup | Choose the account's preferred service facility or equipment to make sure services are scheduled correctly for the customer. |
| preferredequipmentidname | String | N/A |
| preferredserviceid | Lookup | Choose the account's preferred service for reference when you schedule service activities. |
| preferredserviceidname | String | N/A |
| preferredsystemuserid | Lookup | Choose the preferred service representative for reference when you schedule service activities for the account. |
| preferredsystemuseridname | String | N/A |
| preferredsystemuseridyominame | String | N/A |
| primarycontactid | Lookup | Choose the primary contact for the account to provide quick access to contact details. |
| primarycontactidname | String | N/A |
| primarycontactidyominame | String | N/A |
| primarysatoriid | String | Primary Satori ID for Account |
| primarytwitterid | String | Primary Twitter ID for Account |
| processid | Uniqueidentifier | Shows the ID of the process. |
| revenue | Money | Type the annual revenue for the account, used as an indicator in financial performance analysis. |
| revenue\_base | Money | Shows the annual revenue converted to the system's default base currency. The calculations use the exchange rate specified in the Currencies area. |
| sharesoutstanding | Integer | Type the number of shares available to the public for the account. This number is used as an indicator in financial performance analysis. |
| shippingmethodcode | Picklist | Select a shipping method for deliveries sent to the account's address to designate the preferred carrier or other delivery option. |
| shippingmethodcodename | Virtual | N/A |
| sic | String | Type the Standard Industrial Classification (SIC) code that indicates the account's primary industry of business, for use in marketing segmentation and demographic analysis. |
| slaid | Lookup | Choose the service level agreement (SLA) that you want to apply to the Account record. |
| slainvokedid | Lookup | Last SLA that was applied to this case. This field is for internal use only. |
| slainvokedidname | String | N/A |
| slaname | String | N/A |
| stageid | Uniqueidentifier | Shows the ID of the stage. |
| statecode | State | Shows whether the account is active or inactive. Inactive accounts are read-only and can't be edited unless they are reactivated. |
| statecodename | Virtual | N/A |
| statuscode | Status | Select the account's status. |
| statuscodename | Virtual | N/A |
| stockexchange | String | Type the stock exchange at which the account is listed to track their stock and financial performance of the company. |
| teamsfollowed | Integer | Number of users or conversations followed the record |
| telephone1 | String | Type the main phone number for this account. |
| telephone2 | String | Type a second phone number for this account. |
| telephone3 | String | Type a third phone number for this account. |
| territorycode | Picklist | Select a region or territory for the account for use in segmentation and analysis. |
| territorycodename | Virtual | N/A |
| territoryid | Lookup | Choose the sales region or territory for the account to make sure the account is assigned to the correct representative and for use in segmentation and analysis. |
| territoryidname | String | N/A |
| tickersymbol | String | Type the stock exchange symbol for the account to track financial performance of the company. You can click the code entered in this field to access the latest trading information from MSN Money. |
| timespentbymeonemailandmeetings | String | Total time spent for emails (read and write) and meetings by me in relation to account record. |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Choose the local currency for the record to make sure budgets are reported in the correct currency. |
| transactioncurrencyidname | String | N/A |
| traversedpath | String | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version number of the account. |
| websiteurl | String | Type the account's website URL to get quick details about the company profile. |
| yominame | String | Type the phonetic spelling of the company name, if specified in Japanese, to make sure the name is pronounced correctly in phone calls and other communications. |

# Campaign

Campaigns are used to define and manage outbound marketing activities, the recipients of campaign messaging (campaign members), and the giving that result from those campaigns. A market-leading nonprofit CRM will also ensure that its campaign entity results in better segmentation and revenue attribution capabilities for nonprofit organizations. Campaigns allow you to understand what activities are producing revenue for your organization across renewal mailings, telemarketing, online donation forms, the activity of major gifts officers, and more. Campaigns record where funds are coming from, in contrast to general accounting units, which record where funds are being allocated to.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| actualend | DateTime | Enter the date when the campaign was closed or completed. |
| actualstart | DateTime | Enter the actual start date and time for the campaign. |
| budgetedcost | Money | Type the amount budgeted for the campaign to define a limit for how much you can spend. |
| budgetedcost\_base | Money | Value of the Budget Allocated in base currency. |
| campaignid | Uniqueidentifier | Unique identifier of the campaign. |
| codename | String | Type a number or other tracking code to identify the campaign. If no value is entered, a code will be generated automatically. |
| createdby | Lookup | Shows who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Shows who created the record on behalf of another user. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| description | Memo | Type additional information to describe the campaign, such as the products or services offered or the targeted audience. |
| emailaddress | String | The primary email address for the entity. |
| entityimage | Virtual | The default image for the entity. |
| entityimage\_timestamp | BigInt | N/A |
| entityimage\_url | String | N/A |
| entityimageid | Uniqueidentifier | N/A |
| exchangerate | Decimal | Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency. |
| expectedresponse | Integer | Type the expected response rate for the campaign as a full number between 0 and 100. |
| expectedrevenue | Money | Type the expected revenue for the campaign for return on investment projections and post-campaign reporting. |
| expectedrevenue\_base | Money | Value of the Estimated Revenue in base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| istemplate | Boolean | Select whether the campaign is a template that can be copied when you create future campaigns. |
| istemplatename | Virtual | N/A |
| message | String | Type the promotional message or marketing copy for the campaign. |
| modifiedby | Lookup | Shows who last updated the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Shows who created the record on behalf of another user. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_appealsegment | Picklist | Giving level or operational area the Campaign is soliciting. |
| msnfp\_appealsegmentname | Virtual | N/A |
| msnfp\_aquisitionsource | String | Source of the donors solicited for the campaign |
| msnfp\_campaign\_defaultdesignation | Lookup | Unique identifier for Designation associated with Campaign. |
| msnfp\_campaign\_defaultdesignationname | String | N/A |
| msnfp\_campaigncategory | Picklist | Assigned manually by the organization, this field is used for downstream analytics |
| msnfp\_campaigncategoryname | Virtual | N/A |
| msnfp\_campaigntype | Picklist | Type of gifts the Campaign is soliciting. |
| msnfp\_campaigntypename | Virtual | N/A |
| msnfp\_channel | Picklist | Method in which the Campaign will be communicated to constituents. |
| msnfp\_channelname | Virtual | N/A |
| msnfp\_effort | Picklist | Number of times correspondence has been sent this Campaign. |
| msnfp\_effortname | Virtual | N/A |
| msnfp\_firstresponsedate | DateTime | Date the first response was received against the campaign |
| msnfp\_lastresponsedate | DateTime | Last day a response is received against the campaign |
| msnfp\_sourcecode | String | Source Code of Campaign as generated by rules defined in the Source Codes configuration. |
| msnfp\_startdate | DateTime | Starting date for the campaign. |
| msnfp\_subchannel | Picklist | Specific way in which the Channel communication will be carried out. |
| msnfp\_subchannelname | Virtual | N/A |
| name | String | Type a name for the campaign so that it is identified correctly in lists. |
| objective | Memo | Type the objective of the campaign, including products, services, discounts, and pricing. |
| othercost | Money | Type the sum of any miscellaneous campaign costs not included in the campaign activities to make sure the actual cost of the campaign is calculated correctly. |
| othercost\_base | Money | Value of the Miscellaneous Costs in base currency. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| pricelistid | Lookup | Choose the price list associated with this item to make sure the products associated with the campaign are offered at the correct prices. |
| pricelistname | String | N/A |
| processid | Uniqueidentifier | Contains the id of the process associated with the entity. |
| promotioncodename | String | Type a promotional code to track sales related to the campaign or allow customers to redeem a discount offer. |
| proposedend | DateTime | Enter the date when the campaign is scheduled to end. |
| proposedstart | DateTime | Enter the date when the campaign is scheduled to start. |
| stageid | Uniqueidentifier | Contains the id of the stage where the entity is located. |
| statecode | State | Shows the status of the campaign. By default, campaigns are active and can't be deactivated. |
| statecodename | Virtual | N/A |
| statuscode | Status | Select the campaign's status. |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| totalactualcost | Money | Shows the sum of the amounts entered in the Total Cost of Campaign Activities and Miscellaneous Costs fields. |
| totalactualcost\_base | Money | Value of the Total Cost of Campaign in base currency. |
| totalcampaignactivityactualcost | Money | Shows the sum of the values entered in the Actual Cost field on all campaign activities related to the campaign. |
| totalcampaignactivityactualcost\_base | Money | Value of the Total Cost of Campaign Activities in base currency. |
| transactioncurrencyid | Lookup | Choose the local currency for the record to make sure budgets are reported in the correct currency. |
| transactioncurrencyidname | String | N/A |
| traversedpath | String | A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur. |
| typecode | Picklist | Select the type of the campaign. |
| typecodename | Virtual | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Contact

A contact is always an individual, and is sometimes part of a household and/or an organization. An individual contact can exist on its own, or be part of a household along with other contacts with whom it has a relationship. A contact can also be part of an organization, and a nonprofit uses the concept of organizations to track which contacts have an influence on an organizations giving. For instance, Mrs. Smith (sometimes referred to as Doctor Smith) sometimes gives individually, sometimes gives via her household (along with her partner) and sometimes gives through her medical practices. All three scenarios require specific tracking, rollup, reporting, reconciliation against the financial system, and acknowledgement.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| accountid | Lookup | Unique identifier of the account with which the contact is associated. |
| accountidname | String | N/A |
| accountidyominame | String | N/A |
| accountrolecode | Picklist | Select the contact's role within the company or sales process, such as decision maker, employee, or influencer. |
| accountrolecodename | Virtual | N/A |
| address1\_addressid | Uniqueidentifier | Unique identifier for address 1. |
| address1\_addresstypecode | Picklist | Select the primary address type. |
| address1\_addresstypecodename | Virtual | N/A |
| address1\_city | String | Type the city for the primary address. |
| address1\_composite | Memo | Shows the complete primary address. |
| address1\_country | String | Type the country or region for the primary address. |
| address1\_county | String | Type the county for the primary address. |
| address1\_fax | String | Type the fax number associated with the primary address. |
| address1\_freighttermscode | Picklist | Select the freight terms for the primary address to make sure shipping orders are processed correctly. |
| address1\_freighttermscodename | Virtual | N/A |
| address1\_latitude | Double | Type the latitude value for the primary address for use in mapping and other applications. |
| address1\_line1 | String | Type the first line of the primary address. |
| address1\_line2 | String | Type the second line of the primary address. |
| address1\_line3 | String | Type the third line of the primary address. |
| address1\_longitude | Double | Type the longitude value for the primary address for use in mapping and other applications. |
| address1\_name | String | Type a descriptive name for the primary address, such as Corporate Headquarters. |
| address1\_postalcode | String | Type the ZIP Code or postal code for the primary address. |
| address1\_postofficebox | String | Type the post office box number of the primary address. |
| address1\_primarycontactname | String | Type the name of the main contact at the account's primary address. |
| address1\_shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| address1\_shippingmethodcodename | Virtual | N/A |
| address1\_stateorprovince | String | Type the state or province of the primary address. |
| address1\_telephone1 | String | Type the main phone number associated with the primary address. |
| address1\_telephone2 | String | Type a second phone number associated with the primary address. |
| address1\_telephone3 | String | Type a third phone number associated with the primary address. |
| address1\_upszone | String | Type the UPS zone of the primary address to make sure shipping charges are calculated correctly and deliveries are made promptly, if shipped by UPS. |
| address1\_utcoffset | Integer | Select the time zone, or UTC offset, for this address so that other people can reference it when they contact someone at this address. |
| address2\_addressid | Uniqueidentifier | Unique identifier for address 2. |
| address2\_addresstypecode | Picklist | Select the secondary address type. |
| address2\_addresstypecodename | Virtual | N/A |
| address2\_city | String | Type the city for the secondary address. |
| address2\_composite | Memo | Shows the complete secondary address. |
| address2\_country | String | Type the country or region for the secondary address. |
| address2\_county | String | Type the county for the secondary address. |
| address2\_fax | String | Type the fax number associated with the secondary address. |
| address2\_freighttermscode | Picklist | Select the freight terms for the secondary address to make sure shipping orders are processed correctly. |
| address2\_freighttermscodename | Virtual | N/A |
| address2\_latitude | Double | Type the latitude value for the secondary address for use in mapping and other applications. |
| address2\_line1 | String | Type the first line of the secondary address. |
| address2\_line2 | String | Type the second line of the secondary address. |
| address2\_line3 | String | Type the third line of the secondary address. |
| address2\_longitude | Double | Type the longitude value for the secondary address for use in mapping and other applications. |
| address2\_name | String | Type a descriptive name for the secondary address, such as Corporate Headquarters. |
| address2\_postalcode | String | Type the ZIP Code or postal code for the secondary address. |
| address2\_postofficebox | String | Type the post office box number of the secondary address. |
| address2\_primarycontactname | String | Type the name of the main contact at the account's secondary address. |
| address2\_shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| address2\_shippingmethodcodename | Virtual | N/A |
| address2\_stateorprovince | String | Type the state or province of the secondary address. |
| address2\_telephone1 | String | Type the main phone number associated with the secondary address. |
| address2\_telephone2 | String | Type a second phone number associated with the secondary address. |
| address2\_telephone3 | String | Type a third phone number associated with the secondary address. |
| address2\_upszone | String | Type the UPS zone of the secondary address to make sure shipping charges are calculated correctly and deliveries are made promptly, if shipped by UPS. |
| address2\_utcoffset | Integer | Select the time zone, or UTC offset, for this address so that other people can reference it when they contact someone at this address. |
| address3\_addressid | Uniqueidentifier | Unique identifier for address 3. |
| address3\_addresstypecode | Picklist | Select the third address type. |
| address3\_addresstypecodename | Virtual | N/A |
| address3\_city | String | Type the city for the 3rd address. |
| address3\_composite | Memo | Shows the complete third address. |
| address3\_country | String | the country or region for the 3rd address. |
| address3\_county | String | Type the county for the third address. |
| address3\_fax | String | Type the fax number associated with the third address. |
| address3\_freighttermscode | Picklist | Select the freight terms for the third address to make sure shipping orders are processed correctly. |
| address3\_freighttermscodename | Virtual | N/A |
| address3\_latitude | Double | Type the latitude value for the third address for use in mapping and other applications. |
| address3\_line1 | String | the first line of the 3rd address. |
| address3\_line2 | String | the second line of the 3rd address. |
| address3\_line3 | String | the third line of the 3rd address. |
| address3\_longitude | Double | Type the longitude value for the third address for use in mapping and other applications. |
| address3\_name | String | Type a descriptive name for the third address, such as Corporate Headquarters. |
| address3\_postalcode | String | the ZIP Code or postal code for the 3rd address. |
| address3\_postofficebox | String | the post office box number of the 3rd address. |
| address3\_primarycontactname | String | Type the name of the main contact at the account's third address. |
| address3\_shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| address3\_shippingmethodcodename | Virtual | N/A |
| address3\_stateorprovince | String | the state or province of the third address. |
| address3\_telephone1 | String | Type the main phone number associated with the third address. |
| address3\_telephone2 | String | Type a second phone number associated with the third address. |
| address3\_telephone3 | String | Type a third phone number associated with the primary address. |
| address3\_upszone | String | Type the UPS zone of the third address to make sure shipping charges are calculated correctly and deliveries are made promptly, if shipped by UPS. |
| address3\_utcoffset | Integer | Select the time zone, or UTC offset, for this address so that other people can reference it when they contact someone at this address. |
| aging30 | Money | For system use only. |
| aging30\_base | Money | Shows the Aging 30 field converted to the system's default base currency. The calculations use the exchange rate specified in the Currencies area. |
| aging60 | Money | For system use only. |
| aging60\_base | Money | Shows the Aging 60 field converted to the system's default base currency. The calculations use the exchange rate specified in the Currencies area. |
| aging90 | Money | For system use only. |
| aging90\_base | Money | Shows the Aging 90 field converted to the system's default base currency. The calculations use the exchange rate specified in the Currencies area. |
| anniversary | DateTime | Enter the date of the contact's wedding or service anniversary for use in customer gift programs or other communications. |
| annualincome | Money | Type the contact's annual income for use in profiling and financial analysis. |
| annualincome\_base | Money | Shows the Annual Income field converted to the system's default base currency. The calculations use the exchange rate specified in the Currencies area. |
| assistantname | String | Type the name of the contact's assistant. |
| assistantphone | String | Type the phone number for the contact's assistant. |
| birthdate | DateTime | Enter the contact's birthday for use in customer gift programs or other communications. |
| business2 | String | Type a second business phone number for this contact. |
| callback | String | Type a callback phone number for this contact. |
| childrensnames | String | Type the names of the contact's children for reference in communications and client programs. |
| company | String | Type the company phone of the contact. |
| contactid | Uniqueidentifier | Unique identifier of the contact. |
| createdby | Lookup | Shows who created the record. |
| createdbyexternalparty | Lookup | Shows the external party who created the record. |
| createdbyexternalpartyname | String | N/A |
| createdbyexternalpartyyominame | String | N/A |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Shows the date and time when the record was created. The date and time are displayed in the time zone selected in Microsoft Dynamics 365 options. |
| createdonbehalfby | Lookup | Shows who created the record on behalf of another user. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| creditlimit | Money | Type the credit limit of the contact for reference when you address invoice and accounting issues with the customer. |
| creditlimit\_base | Money | Shows the Credit Limit field converted to the system's default base currency for reporting purposes. The calculations use the exchange rate specified in the Currencies area. |
| creditonhold | Boolean | Select whether the contact is on a credit hold, for reference when addressing invoice and accounting issues. |
| creditonholdname | Virtual | N/A |
| customersizecode | Picklist | Select the size of the contact's company for segmentation and reporting purposes. |
| customersizecodename | Virtual | N/A |
| customertypecode | Picklist | Select the category that best describes the relationship between the contact and your organization. |
| customertypecodename | Virtual | N/A |
| defaultpricelevelid | Lookup | Choose the default price list associated with the contact to make sure the correct product prices for this customer are applied in sales opportunities, quotes, and orders. |
| defaultpricelevelidname | String | N/A |
| department | String | Type the department or business unit where the contact works in the parent company or business. |
| description | Memo | Type additional information to describe the contact, such as an excerpt from the company's website. |
| donotbulkemail | Boolean | Select whether the contact accepts bulk email sent through marketing campaigns or quick campaigns. If Do Not Allow is selected, the contact can be added to marketing lists, but will be excluded from the email. |
| donotbulkemailname | Virtual | N/A |
| donotbulkpostalmail | Boolean | Select whether the contact accepts bulk postal mail sent through marketing campaigns or quick campaigns. If Do Not Allow is selected, the contact can be added to marketing lists, but will be excluded from the letters. |
| donotbulkpostalmailname | Virtual | N/A |
| donotemail | Boolean | Select whether the contact allows direct email sent from Microsoft Dynamics 365. If Do Not Allow is selected, Microsoft Dynamics 365 will not send the email. |
| donotemailname | Virtual | N/A |
| donotfax | Boolean | Select whether the contact allows faxes. If Do Not Allow is selected, the contact will be excluded from any fax activities distributed in marketing campaigns. |
| donotfaxname | Virtual | N/A |
| donotphone | Boolean | Select whether the contact accepts phone calls. If Do Not Allow is selected, the contact will be excluded from any phone call activities distributed in marketing campaigns. |
| donotphonename | Virtual | N/A |
| donotpostalmail | Boolean | Select whether the contact allows direct mail. If Do Not Allow is selected, the contact will be excluded from letter activities distributed in marketing campaigns. |
| donotpostalmailname | Virtual | N/A |
| donotsendmarketingmaterialname | Virtual | N/A |
| donotsendmm | Boolean | Select whether the contact accepts marketing materials, such as brochures or catalogs. Contacts that opt out can be excluded from marketing initiatives. |
| educationcode | Picklist | Select the contact's highest level of education for use in segmentation and analysis. |
| educationcodename | Virtual | N/A |
| emailaddress1 | String | Type the primary email address for the contact. |
| emailaddress2 | String | Type the secondary email address for the contact. |
| emailaddress3 | String | Type an alternate email address for the contact. |
| employeeid | String | Type the employee ID or number for the contact for reference in orders, service cases, or other communications with the contact's organization. |
| entityimage | Virtual | Shows the default image for the record. |
| entityimage\_timestamp | BigInt | N/A |
| entityimage\_url | String | N/A |
| entityimageid | Uniqueidentifier | For internal use only. |
| exchangerate | Decimal | Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency. |
| externaluseridentifier | String | Identifier for an external user. |
| familystatuscode | Picklist | Select the marital status of the contact for reference in follow-up phone calls and other communications. |
| familystatuscodename | Virtual | N/A |
| fax | String | Type the fax number for the contact. |
| firstname | String | Type the contact's first name to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns. |
| followemail | Boolean | Information about whether to allow following email activity like opens, attachment views and link clicks for emails sent to the contact. |
| followemailname | Virtual | N/A |
| ftpsiteurl | String | Type the URL for the contact's FTP site to enable users to access data and share documents. |
| fullname | String | Combines and shows the contact's first and last names so that the full name can be displayed in views and reports. |
| gendercode | Picklist | Select the contact's gender to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns. |
| gendercodename | Virtual | N/A |
| governmentid | String | Type the passport number or other government ID for the contact for use in documents or reports. |
| haschildrencode | Picklist | Select whether the contact has any children for reference in follow-up phone calls and other communications. |
| haschildrencodename | Virtual | N/A |
| home2 | String | Type a second home phone number for this contact. |
| importsequencenumber | Integer | Unique identifier of the data import or data migration that created this record. |
| isautocreate | Boolean | Information about whether the contact was auto-created when promoting an email or an appointment. |
| isbackofficecustomer | Boolean | Select whether the contact exists in a separate accounting or other system, such as Microsoft Dynamics GP or another ERP database, for use in integration processes. |
| isbackofficecustomername | Virtual | N/A |
| isprivate | Boolean | N/A |
| isprivatename | Virtual | N/A |
| jobtitle | String | Type the job title of the contact to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns. |
| lastname | String | Type the contact's last name to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns. |
| lastonholdtime | DateTime | Contains the date and time stamp of the last on hold time. |
| lastusedincampaign | DateTime | Shows the date when the contact was last included in a marketing campaign or quick campaign. |
| leadsourcecode | Picklist | Select the primary marketing source that directed the contact to your organization. |
| leadsourcecodename | Virtual | N/A |
| managername | String | Type the name of the contact's manager for use in escalating issues or other follow-up communications with the contact. |
| managerphone | String | Type the phone number for the contact's manager. |
| marketingonly | Boolean | Whether is only for marketing |
| marketingonlyname | Virtual | N/A |
| mastercontactidname | String | N/A |
| mastercontactidyominame | String | N/A |
| masterid | Lookup | Unique identifier of the master contact for merge. |
| merged | Boolean | Shows whether the account has been merged with a master contact. |
| mergedname | Virtual | N/A |
| middlename | String | Type the contact's middle name or initial to make sure the contact is addressed correctly. |
| mobilephone | String | Type the mobile phone number for the contact. |
| modifiedby | Lookup | Shows who last updated the record. |
| modifiedbyexternalparty | Lookup | Shows the external party who modified the record. |
| modifiedbyexternalpartyname | String | N/A |
| modifiedbyexternalpartyyominame | String | N/A |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Shows the date and time when the record was last updated. The date and time are displayed in the time zone selected in Microsoft Dynamics 365 options. |
| modifiedonbehalfby | Lookup | Shows who last updated the record on behalf of another user. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msdyn\_gdproptout | Boolean | Describes whether contact is opted out or not |
| msdyn\_gdproptoutname | Virtual | N/A |
| msnfp\_age | Integer | Age auto calculated via formula using Birthdate. |
| msnfp\_birthday | Picklist | Manually populated contact birth day. |
| msnfp\_birthdayname | Virtual | N/A |
| msnfp\_birthmonth | Picklist | Manually populated Contact birth month. |
| msnfp\_birthmonthname | Virtual | N/A |
| msnfp\_birthyear | Integer | Manually populated Contact birth year. |
| msnfp\_ethnicity | Picklist | Manually populated field indicating Ethnicity of a Contact. |
| msnfp\_ethnicityname | Virtual | N/A |
| msnfp\_maidenname | String | Manually populated field indicating Contact's Maiden name. |
| msnfp\_primaryconstituenttype | Picklist | Subcategory of primary Constituency type rolls up to this field. |
| msnfp\_primaryconstituenttypename | Virtual | N/A |
| msnfp\_reportstoid | Lookup | Reports To |
| msnfp\_reportstoidname | String | N/A |
| msnfp\_reportstoidyominame | String | N/A |
| nickname | String | Type the contact's nickname. |
| numberofchildren | Integer | Type the number of children the contact has for reference in follow-up phone calls and other communications. |
| onholdtime | Integer | Shows how long, in minutes, that the record was on hold. |
| originatingleadid | Lookup | Shows the lead that the contact was created if the contact was created by converting a lead in Microsoft Dynamics 365. This is used to relate the contact to the data on the originating lead for use in reporting and analytics. |
| originatingleadidname | String | N/A |
| originatingleadidyominame | String | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Enter the user or team who is assigned to manage the record. This field is updated every time the record is assigned to a different user. |
| owneridname | String | N/A |
| owneridtype | EntityName | N/A |
| owneridyominame | String | N/A |
| owningbusinessunit | Lookup | Unique identifier of the business unit that owns the contact. |
| owningteam | Lookup | Unique identifier of the team who owns the contact. |
| owninguser | Lookup | Unique identifier of the user who owns the contact. |
| pager | String | Type the pager number for the contact. |
| parentcontactid | Lookup | Unique identifier of the parent contact. |
| parentcontactidname | String | N/A |
| parentcontactidyominame | String | N/A |
| parentcustomerid | Customer | Select the parent account or parent contact for the contact to provide a quick link to additional details, such as financial information, activities, and opportunities. |
| parentcustomeridname | String | N/A |
| parentcustomeridtype | EntityName | N/A |
| parentcustomeridyominame | String | N/A |
| participatesinworkflow | Boolean | Shows whether the contact participates in workflow rules. |
| participatesinworkflowname | Virtual | N/A |
| paymenttermscode | Picklist | Select the payment terms to indicate when the customer needs to pay the total amount. |
| paymenttermscodename | Virtual | N/A |
| preferredappointmentdaycode | Picklist | Select the preferred day of the week for service appointments. |
| preferredappointmentdaycodename | Virtual | N/A |
| preferredappointmenttimecode | Picklist | Select the preferred time of day for service appointments. |
| preferredappointmenttimecodename | Virtual | N/A |
| preferredcontactmethodcode | Picklist | Select the preferred method of contact. |
| preferredcontactmethodcodename | Virtual | N/A |
| preferredequipmentid | Lookup | Choose the contact's preferred service facility or equipment to make sure services are scheduled correctly for the customer. |
| preferredequipmentidname | String | N/A |
| preferredserviceid | Lookup | Choose the contact's preferred service to make sure services are scheduled correctly for the customer. |
| preferredserviceidname | String | N/A |
| preferredsystemuserid | Lookup | Choose the regular or preferred customer service representative for reference when scheduling service activities for the contact. |
| preferredsystemuseridname | String | N/A |
| preferredsystemuseridyominame | String | N/A |
| processid | Uniqueidentifier | Shows the ID of the process. |
| salutation | String | Type the salutation of the contact to make sure the contact is addressed correctly in sales calls, email messages, and marketing campaigns. |
| shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| shippingmethodcodename | Virtual | N/A |
| slaid | Lookup | Choose the service level agreement (SLA) that you want to apply to the Contact record. |
| slainvokedid | Lookup | Last SLA that was applied to this case. This field is for internal use only. |
| slainvokedidname | String | N/A |
| slaname | String | N/A |
| spousesname | String | Type the name of the contact's spouse or partner for reference during calls, events, or other communications with the contact. |
| stageid | Uniqueidentifier | Shows the ID of the stage. |
| statecode | State | Shows whether the contact is active or inactive. Inactive contacts are read-only and can't be edited unless they are reactivated. |
| statecodename | Virtual | N/A |
| statuscode | Status | Select the contact's status. |
| statuscodename | Virtual | N/A |
| subscriptionid | Uniqueidentifier | For internal use only. |
| suffix | String | Type the suffix used in the contact's name, such as Jr. or Sr. to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns. |
| teamsfollowed | Integer | Number of users or conversations followed the record |
| telephone1 | String | Type the main phone number for this contact. |
| telephone2 | String | Type a second phone number for this contact. |
| telephone3 | String | Type a third phone number for this contact. |
| territorycode | Picklist | Select a region or territory for the contact for use in segmentation and analysis. |
| territorycodename | Virtual | N/A |
| timespentbymeonemailandmeetings | String | Total time spent for emails (read and write) and meetings by me in relation to the contact record. |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Choose the local currency for the record to make sure budgets are reported in the correct currency. |
| transactioncurrencyidname | String | N/A |
| traversedpath | String | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version number of the contact. |
| websiteurl | String | Type the contact's professional or personal website or blog URL. |
| yomifirstname | String | Type the phonetic spelling of the contact's first name, if the name is specified in Japanese, to make sure the name is pronounced correctly in phone calls with the contact. |
| yomifullname | String | Shows the combined Yomi first and last names of the contact so that the full phonetic name can be displayed in views and reports. |
| yomilastname | String | Type the phonetic spelling of the contact's last name, if the name is specified in Japanese, to make sure the name is pronounced correctly in phone calls with the contact. |
| yomimiddlename | String | Type the phonetic spelling of the contact's middle name, if the name is specified in Japanese, to make sure the name is pronounced correctly in phone calls with the contact. |

# Address

Critical contact methods for an account or contact. Includes individual, organization and household mailing addresses; seasonal addresses for donors who have multiple homes and require specific mailing rules and dates about where to reach them when; email addresses; phone numbers and calling preferences, social media handles, etc. Tracking which addresses are active vs. historical, when a particular address should and shouldn't be used, and keeping addresses "cleansed" against localizations standards like the United States Postal Service's National Change of Address requirements can mean the difference between the nonprofit qualifying for a bulk mail rate or not.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| addressnumber | Integer | Shows the number of the address, to indicate whether the address is the primary, secondary, or other address for the customer. |
| addresstypecode | Picklist | Select the address type, such as primary or billing. |
| addresstypecodename | Virtual | N/A |
| city | String | Type the city for the customer's address to help identify the location. |
| composite | Memo | Shows the complete address. |
| country | String | Type the country or region for the customer's address. |
| county | String | Type the county for the customer's address. |
| createdby | Lookup | Shows who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Shows the date and time when the record was created. The date and time are displayed in the time zone selected in Microsoft Dynamics 365 options. |
| createdonbehalfby | Lookup | Shows who created the record on behalf of another user. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| customeraddressid | Uniqueidentifier | Unique identifier of the customer address. |
| exchangerate | Decimal | Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency. |
| fax | String | Type the fax number associated with the customer's address. |
| freighttermscode | Picklist | Select the freight terms to make sure shipping charges are processed correctly. |
| freighttermscodename | Virtual | N/A |
| importsequencenumber | Integer | Unique identifier of the data import or data migration that created this record. |
| latitude | Double | Type the latitude value for the customer's address, for use in mapping and other applications. |
| line1 | String | Type the first line of the customer's address to help identify the location. |
| line2 | String | Type the second line of the customer's address. |
| line3 | String | Type the third line of the customer's address. |
| longitude | Double | Type the longitude value for the customer's address, for use in mapping and other applications. |
| modifiedby | Lookup | Shows who last updated the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Shows the date and time when the record was last updated. The date and time are displayed in the time zone selected in Microsoft Dynamics 365 options. |
| modifiedonbehalfby | Lookup | Shows who last updated the record on behalf of another user. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_enddate | DateTime | Effective end date of the address and related contact info |
| msnfp\_isuspsvalidated | Boolean |  |
| msnfp\_isuspsvalidatedname | Virtual | N/A |
| msnfp\_isvalidated | Boolean |  |
| msnfp\_isvalidatedname | Virtual | N/A |
| msnfp\_region | Picklist | Indicates the region of the world that the address is located. |
| msnfp\_regionname | Virtual | N/A |
| msnfp\_seasonalendday | Picklist | Annual end day (of month) of the address and related contact info |
| msnfp\_seasonalenddayname | Virtual | N/A |
| msnfp\_seasonalendmonth | Picklist | Annual end month of the address and related contact info |
| msnfp\_seasonalendmonthname | Virtual | N/A |
| msnfp\_seasonalstartday | Picklist | Annual start day (of month) of the address and related contact info |
| msnfp\_seasonalstartdayname | Virtual | N/A |
| msnfp\_seasonalstartmonth | Picklist | Annual start month of the address and related contact info |
| msnfp\_seasonalstartmonthname | Virtual | N/A |
| msnfp\_startdate | DateTime | Effective start date of the address and related contact info |
| msnfp\_telephone1typecode | Picklist |  |
| msnfp\_telephone1typecodename | Virtual | N/A |
| msnfp\_telephone2typecode | Picklist |  |
| msnfp\_telephone2typecodename | Virtual | N/A |
| msnfp\_telephone3typecode | Picklist |  |
| msnfp\_telephone3typecodename | Virtual | N/A |
| name | String | Type a descriptive name for the customer's address, such as Corporate Headquarters. |
| objecttypecode | EntityName | Shows the type code of the customer record to indicate whether the address belongs to a customer account or contact. |
| objecttypecodename | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Enter the user or team who is assigned to manage the record. This field is updated every time the record is assigned to a different user. |
| owneridtype | EntityName | N/A |
| owningbusinessunit | Lookup | Shows the business unit that the record owner belongs to. |
| owninguser | Lookup | Unique identifier of the user who owns the customer address. |
| parentid | Lookup | Choose the customer's address. |
| parentidtypecode | EntityName | N/A |
| postalcode | String | Type the ZIP Code or postal code for the address. |
| postofficebox | String | Type the post office box number of the customer's address. |
| primarycontactname | String | Type the name of the primary contact person for the customer's address. |
| shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| shippingmethodcodename | Virtual | N/A |
| stateorprovince | String | Type the state or province of the customer's address. |
| telephone1 | String | Type the primary phone number for the customer's address. |
| telephone2 | String | Type a second phone number for the customer's address. |
| telephone3 | String | Type a third phone number for the customer's address. |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Choose the local currency for the record to make sure budgets are reported in the correct currency. |
| transactioncurrencyidname | String | N/A |
| upszone | String | Type the UPS zone of the customer's address to make sure shipping charges are calculated correctly and deliveries are made promptly, if shipped by UPS. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| utcoffset | Integer | Select the time zone for the address. |
| versionnumber | BigInt | Version number of the customer address. |

# Lead

An Inquiry or Letter of Inquiry (LOI) (sometimes called a "Lead" in other models/CRMs) represents a preliminary request for funding that allows a foundation to vet the organization and appropriateness of the project before declining the inquiry or inviting the applicant to submit a more thorough application. The LOI is a brief letter outlining an organization's activities and its request for funding sent to a grantmaker to determine whether it would be appropriate to submit a full grant proposal. As a rule, this application is more informal than a full request. Accepted inquiries are converted into requests via a process called Lead Conversion. Many grantmakers prefer to be contacted in this way before receiving a full proposal.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| accountid | Lookup | Unique identifier of the account with which the lead is associated. |
| accountidname | String | N/A |
| accountidyominame | String | N/A |
| address1\_addressid | Uniqueidentifier | Unique identifier for address 1. |
| address1\_addresstypecode | Picklist | Select the primary address type. |
| address1\_addresstypecodename | Virtual | N/A |
| address1\_city | String | Type the city for the primary address. |
| address1\_composite | Memo | Shows the complete primary address. |
| address1\_country | String | Type the country or region for the primary address. |
| address1\_county | String | Type the county for the primary address. |
| address1\_fax | String | Type the fax number associated with the primary address. |
| address1\_latitude | Double | Type the latitude value for the primary address for use in mapping and other applications. |
| address1\_line1 | String | Type the first line of the primary address. |
| address1\_line2 | String | Type the second line of the primary address. |
| address1\_line3 | String | Type the third line of the primary address. |
| address1\_longitude | Double | Type the longitude value for the primary address for use in mapping and other applications. |
| address1\_name | String | Type a descriptive name for the primary address, such as Corporate Headquarters. |
| address1\_postalcode | String | Type the ZIP Code or postal code for the primary address. |
| address1\_postofficebox | String | Type the post office box number of the primary address. |
| address1\_shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| address1\_shippingmethodcodename | Virtual | N/A |
| address1\_stateorprovince | String | Type the state or province of the primary address. |
| address1\_telephone1 | String | Type the main phone number associated with the primary address. |
| address1\_telephone2 | String | Type a second phone number associated with the primary address. |
| address1\_telephone3 | String | Type a third phone number associated with the primary address. |
| address1\_upszone | String | Type the UPS zone of the primary address to make sure shipping charges are calculated correctly and deliveries are made promptly, if shipped by UPS. |
| address1\_utcoffset | Integer | Select the time zone, or UTC offset, for this address so that other people can reference it when they contact someone at this address. |
| address2\_addressid | Uniqueidentifier | Unique identifier for address 2. |
| address2\_addresstypecode | Picklist | Select the secondary address type. |
| address2\_addresstypecodename | Virtual | N/A |
| address2\_city | String | Type the city for the secondary address. |
| address2\_composite | Memo | Shows the complete secondary address. |
| address2\_country | String | Type the country or region for the secondary address. |
| address2\_county | String | Type the county for the secondary address. |
| address2\_fax | String | Type the fax number associated with the secondary address. |
| address2\_latitude | Double | Type the latitude value for the secondary address for use in mapping and other applications. |
| address2\_line1 | String | Type the first line of the secondary address. |
| address2\_line2 | String | Type the second line of the secondary address. |
| address2\_line3 | String | Type the third line of the secondary address. |
| address2\_longitude | Double | Type the longitude value for the secondary address for use in mapping and other applications. |
| address2\_name | String | Type a descriptive name for the secondary address, such as Corporate Headquarters. |
| address2\_postalcode | String | Type the ZIP Code or postal code for the secondary address. |
| address2\_postofficebox | String | Type the post office box number of the secondary address. |
| address2\_shippingmethodcode | Picklist | Select a shipping method for deliveries sent to this address. |
| address2\_shippingmethodcodename | Virtual | N/A |
| address2\_stateorprovince | String | Type the state or province of the secondary address. |
| address2\_telephone1 | String | Type the main phone number associated with the secondary address. |
| address2\_telephone2 | String | Type a second phone number associated with the secondary address. |
| address2\_telephone3 | String | Type a third phone number associated with the secondary address. |
| address2\_upszone | String | Type the UPS zone of the secondary address to make sure shipping charges are calculated correctly and deliveries are made promptly, if shipped by UPS. |
| address2\_utcoffset | Integer | Select the time zone, or UTC offset, for this address so that other people can reference it when they contact someone at this address. |
| budgetamount | Money | Information about the budget amount of the lead's company or organization. |
| budgetamount\_base | Money | Value of the Budget Amount in base currency. |
| budgetstatus | Picklist | Information about the budget status of the lead's company or organization. |
| budgetstatusname | Virtual | N/A |
| campaignid | Lookup | Choose the campaign that the lead was generated from to track the effectiveness of marketing campaigns and identify communications received by the lead. |
| campaignidname | String | N/A |
| companyname | String | Type the name of the company associated with the lead. This becomes the account name when the lead is qualified and converted to a customer account. |
| confirminterest | Boolean | Select whether the lead confirmed interest in your offerings. This helps in determining the lead quality. |
| confirminterestname | Virtual | N/A |
| contactid | Lookup | Unique identifier of the contact with which the lead is associated. |
| contactidname | String | N/A |
| contactidyominame | String | N/A |
| createdby | Lookup | Shows who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Shows who created the record on behalf of another user. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| customerid | Customer | Select the customer account or contact to provide a quick link to additional customer details, such as account information, activities, and opportunities. |
| customeridname | String | N/A |
| customeridtype | EntityName | N/A |
| customeridyominame | String | N/A |
| decisionmaker | Boolean | Select whether your notes include information about who makes the purchase decisions at the lead's company. |
| decisionmakername | Virtual | N/A |
| description | Memo | Type additional information to describe the lead, such as an excerpt from the company's website. |
| donotbulkemail | Boolean | Select whether the lead accepts bulk email sent through marketing campaigns or quick campaigns. If Do Not Allow is selected, the lead can be added to marketing lists, but will be excluded from the email. |
| donotbulkemailname | Virtual | N/A |
| donotemail | Boolean | Select whether the lead allows direct email sent from Microsoft Dynamics 365. |
| donotemailname | Virtual | N/A |
| donotfax | Boolean | Select whether the lead allows faxes. |
| donotfaxname | Virtual | N/A |
| donotphone | Boolean | Select whether the lead allows phone calls. |
| donotphonename | Virtual | N/A |
| donotpostalmail | Boolean | Select whether the lead allows direct mail. |
| donotpostalmailname | Virtual | N/A |
| donotsendmarketingmaterialname | Virtual | N/A |
| donotsendmm | Boolean | Select whether the lead accepts marketing materials, such as brochures or catalogs. Leads that opt out can be excluded from marketing initiatives. |
| emailaddress1 | String | Type the primary email address for the lead. |
| emailaddress2 | String | Type the secondary email address for the lead. |
| emailaddress3 | String | Type a third email address for the lead. |
| entityimage | Virtual | Shows the default image for the record. |
| entityimage\_timestamp | BigInt | N/A |
| entityimage\_url | String | N/A |
| entityimageid | Uniqueidentifier | N/A |
| estimatedamount | Money | Type the estimated revenue value that this lead will generate to assist in sales forecasting and planning. |
| estimatedamount\_base | Money | Value of the Est. Value in base currency. |
| estimatedclosedate | DateTime | Enter the expected close date for the lead, so that the sales team can schedule timely follow-up meetings to move the prospect to the next sales stage. |
| estimatedvalue | Double | Type a numeric value of the lead's estimated value, such as a product quantity, if no revenue amount can be specified in the Est. Value field. This can be used for sales forecasting and planning. |
| evaluatefit | Boolean | Select whether the fit between the lead's requirements and your offerings was evaluated. |
| evaluatefitname | Virtual | N/A |
| exchangerate | Decimal | Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency. |
| fax | String | Type the fax number for the primary contact for the lead. |
| firstname | String | Type the first name of the primary contact for the lead to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns. |
| followemail | Boolean | Information about whether to allow following email activity like opens, attachment views and link clicks for emails sent to the lead. |
| followemailname | Virtual | N/A |
| fullname | String | Combines and shows the lead's first and last names so the full name can be displayed in views and reports. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| industrycode | Picklist | Select the primary industry in which the lead's business is focused, for use in marketing segmentation and demographic analysis. |
| industrycodename | Virtual | N/A |
| initialcommunication | Picklist | Choose whether someone from the sales team contacted this lead earlier. |
| initialcommunicationname | Virtual | N/A |
| isautocreate | Boolean | Information about whether the contact was auto-created when promoting an email or an appointment. |
| isautocreatename | Virtual | N/A |
| isprivate | Boolean | Indicates whether the lead is private or visible to the entire organization. |
| isprivatename | Virtual | N/A |
| jobtitle | String | Type the job title of the primary contact for this lead to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns. |
| lastname | String | Type the last name of the primary contact for the lead to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns. |
| lastonholdtime | DateTime | Contains the date and time stamp of the last on hold time. |
| lastusedincampaign | DateTime | Shows the date when the lead was last included in a marketing campaign or quick campaign. |
| leadid | Uniqueidentifier | Unique identifier of the lead. |
| leadqualitycode | Picklist | Select a rating value to indicate the lead's potential to become a customer. |
| leadqualitycodename | Virtual | N/A |
| leadsourcecode | Picklist | Select the primary marketing source that prompted the lead to contact you. |
| leadsourcecodename | Virtual | N/A |
| masterid | Lookup | Unique identifier of the master lead for merge. |
| masterleadidname | String | N/A |
| masterleadidyominame | String | N/A |
| merged | Boolean | Tells whether the lead has been merged with another lead. |
| mergedname | Virtual | N/A |
| middlename | String | Type the middle name or initial of the primary contact for the lead to make sure the prospect is addressed correctly. |
| mobilephone | String | Type the mobile phone number for the primary contact for the lead. |
| modifiedby | Lookup | Shows who last updated the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Shows who last updated the record on behalf of another user. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msdyn\_gdproptout | Boolean | Describes whether lead is opted out or not |
| msdyn\_gdproptoutname | Virtual | N/A |
| msnfp\_applicationdeadline | DateTime | Deadline to submit application. |
| msnfp\_expectedamountrequested | Money | Amount requested by the Grant Seeker. |
| msnfp\_expectedamountrequested\_base | Money | Value of the Expected Amount Requested in base currency. |
| msnfp\_expectedduration | Integer | Expected duration of the Grant in months. |
| msnfp\_expectedstartdate | DateTime | Expected start date of the Grant. |
| msnfp\_deliveryframeworkid | Lookup | Framework |
| msnfp\_deliveryframeworkidname | String | N/A |
| msnfp\_isrenewal | Boolean | Indicates if this is a renewal Grant. |
| msnfp\_isrenewalname | Virtual | N/A |
| msnfp\_lead\_docketid | Lookup | Docket |
| msnfp\_lead\_docketidname | String | N/A |
| msnfp\_letterofintentdeadline | DateTime | Deadline to submit notification to donor that organization will be competing for this grant. |
| msnfp\_organizationalbudget | Money | Total budget of the Organization. |
| msnfp\_organizationalbudget\_base | Money | Value of the Organization Budget in base currency. |
| msnfp\_organizationtype | Picklist | Type of Account. |
| msnfp\_organizationtypename | Virtual | N/A |
| msnfp\_requesttype | Picklist | Indicates the type of Inquiry/LOI/Lead. |
| msnfp\_requesttypename | Virtual | N/A |
| msnfp\_totalprojectbudget | Money | Budget defined by the Grant Seeker. |
| msnfp\_totalprojectbudget\_base | Money | Value of the Total Project Budget in base currency. |
| need | Picklist | Choose how high the level of need is for the lead's company. |
| needname | Virtual | N/A |
| numberofemployees | Integer | Type the number of employees that work at the company associated with the lead, for use in marketing segmentation and demographic analysis. |
| onholdtime | Integer | Shows how long, in minutes, that the record was on hold. |
| originatingcaseid | Lookup | This attribute is used for Sample Service Business Processes. |
| originatingcaseidname | String | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| pager | String | Type the pager number for the primary contact for the lead. |
| parentaccountid | Lookup | Choose an account to connect this lead to, so that the relationship is visible in reports and analytics. |
| parentaccountidname | String | N/A |
| parentaccountidyominame | String | N/A |
| parentcontactid | Lookup | Choose a contact to connect this lead to, so that the relationship is visible in reports and analytics. |
| parentcontactidname | String | N/A |
| parentcontactidyominame | String | N/A |
| participatesinworkflow | Boolean | Shows whether the lead participates in workflow rules. |
| participatesinworkflowname | Virtual | N/A |
| preferredcontactmethodcode | Picklist | Select the preferred method of contact. |
| preferredcontactmethodcodename | Virtual | N/A |
| prioritycode | Picklist | Select the priority so that preferred customers or critical issues are handled quickly. |
| prioritycodename | Virtual | N/A |
| processid | Uniqueidentifier | Contains the id of the process associated with the entity. |
| purchaseprocess | Picklist | Choose whether an individual or a committee will be involved in the purchase process for the lead. |
| purchaseprocessname | Virtual | N/A |
| purchasetimeframe | Picklist | Choose how long the lead will likely take to make the purchase, so the sales team will be aware. |
| purchasetimeframename | Virtual | N/A |
| qualificationcomments | Memo | Type comments about the qualification or scoring of the lead. |
| qualifyingopportunityid | Lookup | Choose the opportunity that the lead was qualified on and then converted to. |
| qualifyingopportunityidname | String | N/A |
| relatedobjectid | Lookup | Related Campaign Response. |
| relatedobjectidname | String | N/A |
| revenue | Money | Type the annual revenue of the company associated with the lead to provide an understanding of the prospect's business. |
| revenue\_base | Money | Value of the Annual Revenue in base currency. |
| salesstage | Picklist | Select the sales stage of this lead to aid the sales team in their efforts to convert this lead to an opportunity. |
| salesstagecode | Picklist | Select the sales process stage for the lead to help determine the probability of the lead converting to an opportunity. |
| salesstagecodename | Virtual | N/A |
| salesstagename | Virtual | N/A |
| salutation | String | Type the salutation of the primary contact for this lead to make sure the prospect is addressed correctly in sales calls, email messages, and marketing campaigns. |
| schedulefollowup\_prospect | DateTime | Enter the date and time of the prospecting follow-up meeting with the lead. |
| schedulefollowup\_qualify | DateTime | Enter the date and time of the qualifying follow-up meeting with the lead. |
| sic | String | Type the Standard Industrial Classification (SIC) code that indicates the lead's primary industry of business for use in marketing segmentation and demographic analysis. |
| slaid | Lookup | Choose the service level agreement (SLA) that you want to apply to the Lead record. |
| slainvokedid | Lookup | Last SLA that was applied to this case. This field is for internal use only. |
| slainvokedidname | String | N/A |
| slaname | String | N/A |
| stageid | Uniqueidentifier | Contains the id of the stage where the entity is located. |
| statecode | State | Shows whether the lead is open, qualified, or disqualified. Qualified and disqualified leads are read-only and can't be edited unless they are reactivated. |
| statecodename | Virtual | N/A |
| statuscode | Status | Select the lead's status. |
| statuscodename | Virtual | N/A |
| subject | String | Type a subject or descriptive name, such as the expected order, company name, or marketing source list, to identify the lead. |
| teamsfollowed | Integer | Number of users or conversations followed the record |
| telephone1 | String | Type the work phone number for the primary contact for the lead. |
| telephone2 | String | Type the home phone number for the primary contact for the lead. |
| telephone3 | String | Type an alternate phone number for the primary contact for the lead. |
| timespentbymeonemailandmeetings | String | Total time spent for emails (read and write) and meetings by me in relation to the lead record. |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Choose the local currency for the record to make sure budgets are reported in the correct currency. |
| transactioncurrencyidname | String | N/A |
| traversedpath | String | A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |
| websiteurl | String | Type the website URL for the company associated with this lead. |
| yomicompanyname | String | Type the phonetic spelling of the lead's company name, if the name is specified in Japanese, to make sure the name is pronounced correctly in phone calls with the prospect. |
| yomifirstname | String | Type the phonetic spelling of the lead's first name, if the name is specified in Japanese, to make sure the name is pronounced correctly in phone calls with the prospect. |
| yomifullname | String | Combines and shows the lead's Yomi first and last names so the full phonetic name can be displayed in views and reports. |
| yomilastname | String | Type the phonetic spelling of the lead's last name, if the name is specified in Japanese, to make sure the name is pronounced correctly in phone calls with the prospect. |
| yomimiddlename | String | Type the phonetic spelling of the lead's middle name, if the name is specified in Japanese, to make sure the name is pronounced correctly in phone calls with the prospect. |

# Award

The total amount of funding that has been agreed to be awarded to an individual or institution and related data, including but not limited to the recipient, date of the award, and purpose of the award.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_awardid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_docketid | Lookup | Docket |
| msnfp\_docketidname | String | N/A |
| msnfp\_fiscalsponsorid | Lookup | Fiscal Sponsor |
| msnfp\_fiscalsponsoridname | String | N/A |
| msnfp\_fiscalsponsoridyominame | String | N/A |
| msnfp\_internalcontactid | Lookup | Internal Contact |
| msnfp\_internalcontactidname | String | N/A |
| msnfp\_internalcontactidyominame | String | N/A |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_noticeofawardchannel | Picklist | Comm method by which customer is notified that Award is approved. |
| msnfp\_noticeofawardchannelname | Virtual | N/A |
| msnfp\_noticeofawarddate | DateTime | Date when customer is notified that Award is approved. |
| msnfp\_recipient | Customer |  |
| msnfp\_recipientidtype | EntityName | N/A |
| msnfp\_recipientname | String | N/A |
| msnfp\_recipientyominame | String | N/A |
| msnfp\_requestid | Lookup | Request |
| msnfp\_requestidname | String | N/A |
| msnfp\_type | Picklist | Type of Award |
| msnfp\_typename | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Award |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Award |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Award Version

A point in time snapshot of the attributes of an Award.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_awarddate | DateTime | Date award was made. |
| msnfp\_awardenddate | DateTime | Date Award related Activities end. |
| msnfp\_awardid | Lookup | Award |
| msnfp\_awardidname | String | N/A |
| msnfp\_awardstartdate | DateTime | Date Award related Activities begin. Award may be won in June but related activities do not begin until July. |
| msnfp\_awardversionid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_description | Memo |  |
| msnfp\_enrollmentstartdate | DateTime | Manually populated field on a Award record indicating when an Awardee may enroll in Award Activity. |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_performancemeasuressummary | Memo | Brief overview of performance measures as set by Awarder in contract agreement |
| msnfp\_primarycontactid | Lookup | Brief overview of performance measures as set by Awarder in contract agreement |
| msnfp\_primarycontactidname | String | N/A |
| msnfp\_primarycontactidyominame | String | N/A |
| msnfp\_reportingschedule | Memo | Manually populated,indicates the frequency that Award reports are scheduled to be disbursed as agreed in donor contract. These can include financial statements, narrative assessments, Impact reports, |
| msnfp\_status | Picklist | Status of the Report. |
| msnfp\_statusname | Virtual | N/A |
| msnfp\_submittedbyid | Lookup | Submitted By |
| msnfp\_submittedbyidname | String | N/A |
| msnfp\_submittedbyidyominame | String | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Award Version |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Award Version |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Budget

Amount of funds that can be spent on a particular Program for a given fiscal year. It is critically important for Foundations and Nonprofits to be able to track and report against the funds budgeted and the funds spent to date by program.  Some organizations need to be able to track program results and spend to date, and some organizations need to go a level deeper and report back to donors on the efficient use of designated donations/funds to build transparency and trust that allocated funds are spent as the donors intended. Amount of funds that can be spent on a particular Program for a given fiscal year. It is criticaly important for Foundations and Nonprofits to be able to track and report against the funds budgeted and the funds spent to date by program.  Some organizations need to be able to track program results and spend to date, and some organizations need to go a level deeper and report back to donors on the efficient use of designated donations/funds to build transparency and trust that allocated funds are spent as the donors intended.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_budgetid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_budgetname | String | Name of the Budget. |
| msnfp\_description | Memo | Description of the Budget. |
| msnfp\_enddate | DateTime | End date of the objective |
| msnfp\_deliveryframeworkid | Lookup | Framework |
| msnfp\_deliveryframeworkidname | String | N/A |
| msnfp\_name | String | N/A |
| msnfp\_objectiveid | Lookup | Objective |
| msnfp\_objectiveidname | String | N/A |
| msnfp\_startdate | DateTime | Start date off the objective |
| msnfp\_totalbudget | Money | Indicates the total budget amount. |
| msnfp\_totalbudget\_base | Money | Value of the Total Budget in base currency. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Budget |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Budget |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Contributing Framework

Defines the Framework(s) - i.e. Program, Project, Initiative - that contribute to funding an Award Disbursement.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_amount | Money | Amount contributed by the Framework to the Disbursement. |
| msnfp\_amount\_base | Money | Value of the Amount in base currency. |
| msnfp\_budget | Lookup | Budget |
| msnfp\_budgetname | String | N/A |
| msnfp\_contributingframeworkid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_disbursementid | Lookup | Payment |
| msnfp\_disbursementidname | String | N/A |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_paymentdate | DateTime | Indicates the date of the Payment. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Contributing Framework |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Contributing Framework |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Credit Plan

Credit Plans control who will be credited with hard or soft credits after a payment clears. A credit plan could "counted" for membership or other benefit prior to a payment actually being cleared. A Credit Plan shows up as a A line item attached to a Pledge, Payment Schedule, or Account .  The goal of a credit plan is to avoid the double counting of hard, soft and split crediting.  The most elegant way to manage Credit Plan is by ensuring there are business rules in place like an "auto" soft credit rule attached to Accounts, Contacts, Opportunities or Donor Commitments depending on the conditions met.  Credit Plans can be countable toward fulfilling a benefit even if they are never fully realized as a hard or soft credit.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_creditplan\_accountid | Lookup | Default on Account |
| msnfp\_creditplan\_accountidname | String | N/A |
| msnfp\_creditplan\_accountidyominame | String | N/A |
| msnfp\_creditplan\_campaignid | Lookup | Campaign |
| msnfp\_creditplan\_campaignidname | String | N/A |
| msnfp\_creditplan\_paymentscheduleid | Lookup | Payment Schedule |
| msnfp\_creditplan\_paymentscheduleidname | String | N/A |
| msnfp\_creditplanid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_credittype | Picklist |  |
| msnfp\_credittypename | Virtual | N/A |
| msnfp\_name | String | N/A |
| msnfp\_validtodate | DateTime |  |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Credit Plan |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Credit Plan |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Credit Plan Recipient

The contact, donor or constituent who receives "credit" for the hard or soft cleared payment.  A credit plan is always tied to a recipient in order to ensure full reconciliation and accounting of donations.  All nonprofits have business rules in place to govern how hard and soft credits are applied, but these rules are notoriously inconsistent from organization to organization.  For example, 6 of 12 enterprise nonprofits we recently surveyed about how they handle third party (corporate) giving crediting soft credit the corporation and hard credit the individual donors, whereas the other 6 surveyed nonprofits hard credit the third party providing the matching gift payments (i.e., Benevity is an example of a third party gift management company).  Still other organizations hard credit the corporation themselves.  For example, if Jane Smith donates $50 through her company Microsoft, and Microsoft matches the gift dollar for dollar, but Benevity collects and distributes the gift to Oxfam International, where is hard and soft credit applied?  Some organizations hard credit Jane Smith $100 ($50 donated plus the $50 match).  Some organizations hard credit Jane Smith $50 and Microsoft $50.  Some orgs hard credit Microsoft $100. And still more orgs hard credit Benevity some or all of the $100 donation.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_creditplanrecipient\_customer | Customer |  |
| msnfp\_creditplanrecipient\_customeridtype | EntityName | N/A |
| msnfp\_creditplanrecipient\_customername | String | N/A |
| msnfp\_creditplanrecipient\_customeryominame | String | N/A |
| msnfp\_creditrecipient\_creditplanid | Lookup | Credit Plan |
| msnfp\_creditrecipient\_creditplanidname | String | N/A |
| msnfp\_creditrecipientid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_name | String | N/A |
| msnfp\_percentageofpayment | Decimal |  |
| msnfp\_softcreditreason | Picklist |  |
| msnfp\_softcreditreasonname | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Credit Plan Recipient |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Credit Plan Recipient |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Designated Credit

A segment of a donation payment or in-kind gift that indicating the partial amount that is hard- or soft-credited to a Customer and allocated to one Designation.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_adjustmentcomment | Memo | Any notes or details about the adjustment that the user may have optionally entered. |
| msnfp\_adjustmentreason | Picklist |  |
| msnfp\_adjustmentreasonname | Virtual | N/A |
| msnfp\_adjustmenttype | Picklist |  |
| msnfp\_adjustmenttypename | Virtual | N/A |
| msnfp\_amount | Money | The amount of the credit |
| msnfp\_amount\_base | Money | Value of the Amount in base currency. |
| msnfp\_applytocommitmentpaymentdate | DateTime | When this credit accrues toward a donor commitment installment payment, this is the payment date toward which the credit accrues (even if the actual payment received was earlier or later) |
| msnfp\_bookdate | DateTime |  |
| msnfp\_creditreason | Picklist | Dependent picklist based on CreditType |
| msnfp\_creditreasonname | Virtual | N/A |
| msnfp\_credittype | Picklist | Indicating whether this is a Hard, Soft, or Fundraiser credit; or other custom type |
| msnfp\_credittypename | Virtual | N/A |
| msnfp\_dataentryreference | String | Tracks data origin of payment transactions. References may be channel-specific. |
| msnfp\_dataentrysource | Picklist |  |
| msnfp\_dataentrysourcename | Virtual | N/A |
| msnfp\_designatedcreditid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_exchangeratedate | DateTime | The date and time at which the currency exchange rate was determined |
| msnfp\_isadjusted | Boolean | Indicates that this DesignatedCredit has been adjusted by a later DesignatedCredit |
| msnfp\_isadjustedname | Virtual | N/A |
| msnfp\_name | String | N/A |
| msnfp\_posteddate | DateTime |  |
| msnfp\_receiveddate | DateTime |  |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Designated Credit |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Designated Credit |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Designation

An area to which funds may be allocated, including a GL-relevant accounting code.  Designations are the way a donor instructs an organization about how their donation should be spent or earmarked.  All nonprofit organizations strive to secure the largest % of unrestricted or undesignated funds possible so they can use this money at their own discretion toward the areas of greatest need, including the ability to pay down their operating costs.  Direct marketing-oriented nonprofits, and nonprofits with missions aligned to cause, cure, and global issues (like Oxfam) tend to have as few designations as they possibly can (~100-200 total designations) because they derive the majority of their funds from donors giving small gift amounts.  They also focus on recurring giving programs, which have a high administration cost if gifts are permitted to be designated or split designated across multiple funds.  A Higher Education organization, on the other hand, derives a large % of its annual fundraising from major donors, who typically want much more control about where they are directing their gifts.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_acknowledgementname | String | e.g. "Childhood hunger relief" |
| msnfp\_description | Memo |  |
| msnfp\_designationcode | String |  |
| msnfp\_designationgroup | String |  |
| msnfp\_designationid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_enddate | DateTime |  |
| msnfp\_endowmenttype | Picklist |  |
| msnfp\_endowmenttypename | Virtual | N/A |
| msnfp\_glcreditaccount | String |  |
| msnfp\_gldebitaccount | String |  |
| msnfp\_initiative | String |  |
| msnfp\_isactive | Boolean |  |
| msnfp\_isactivename | Virtual | N/A |
| msnfp\_name | String | N/A |
| msnfp\_parentdesignationid | Lookup | Parent Designation |
| msnfp\_parentdesignationidname | String | N/A |
| msnfp\_program | String |  |
| msnfp\_restrictiontype | Picklist |  |
| msnfp\_restrictiontypename | Virtual | N/A |
| msnfp\_startdate | DateTime |  |
| msnfp\_totaldisbursed | Money |  |
| msnfp\_totaldisbursed\_base | Money | Value of the Total Disbursed in base currency. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Designation |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Designation |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Designation Plan

A line item attached to a Pledge, Payment Schedule, or Campaign indicating how associated payments should be designated.  Sometimes, 100% of a donation is designated to a single fund (ideally, to an unrestricted fund that the nonprofit can use any way they wish).  Other times, a donor has specified a desire that the donation be "split designated" among two or more funds.  For example, a donor giving $5,000 might specify that $1000 goes to the unrestricted fund $1000 to the new building fund and $3000 to building water wells Sub-saharan Africa.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_amountofpledgemax | Money |  |
| msnfp\_amountofpledgemax\_base | Money | Value of the Amount Of Pledge Max in base currency. |
| msnfp\_designationplan\_campaignid | Lookup | Campaign |
| msnfp\_designationplan\_campaignidname | String | N/A |
| msnfp\_designationplan\_designationid | Lookup | Designation |
| msnfp\_designationplan\_designationidname | String | N/A |
| msnfp\_designationplan\_donorcommitmentid | Lookup | Donor Commitment |
| msnfp\_designationplan\_donorcommitmentidname | String | N/A |
| msnfp\_designationplan\_opportunityid | Lookup | Opportunity |
| msnfp\_designationplan\_opportunityidname | String | N/A |
| msnfp\_designationplan\_paymentscheduleid | Lookup | Payment Schedule |
| msnfp\_designationplan\_paymentscheduleidname | String | N/A |
| msnfp\_designationplanid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_name | String | N/A |
| msnfp\_numberofpaymentsmax | Integer |  |
| msnfp\_percentageofpaymentsmax | Decimal |  |
| msnfp\_percentageofpledgemax | Decimal |  |
| msnfp\_perpaymentmaxamount | Money |  |
| msnfp\_perpaymentmaxamount\_base | Money | Value of the Per Payment Max Amount in base currency. |
| msnfp\_perpaymentmaxpercent | Decimal |  |
| msnfp\_priorityorder | Integer | Applied when multiple line items might conflict (e.g. 90% vs $1000000) |
| msnfp\_validfromdate | DateTime |  |
| msnfp\_validtodate | DateTime |  |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Designation Plan |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Designation Plan |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Disbursement Distribution

A Disbursement represents an Award disbursement to an individual or organizational awardee.  A Disbursement is related to a specific Award and Budget. There is a published schedule for Award Disbursements that is communicated to the awardee and tracked in the appropriate system of record. Award Disbursements must be reconciled against an organization's financial system.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_adjustmentcomment | Memo | Any notes or details about the adjustment that the user may have optionally entered. |
| msnfp\_adjustmentreason | Picklist |  |
| msnfp\_adjustmentreasonname | Virtual | N/A |
| msnfp\_adjustmenttype | Picklist |  |
| msnfp\_adjustmenttypename | Virtual | N/A |
| msnfp\_adjustsoriginaltransactionid | Lookup | Adjusts Original Transaction |
| msnfp\_adjustsoriginaltransactionidname | String | N/A |
| msnfp\_amount | Money | The amount of the Payment. |
| msnfp\_amount\_base | Money | Value of the Amount in base currency. |
| msnfp\_awardid | Lookup | Award |
| msnfp\_awardidname | String | N/A |
| msnfp\_bookdate | DateTime |  |
| msnfp\_comment | String | Comments about the Payment. |
| msnfp\_description | Memo | Description of the Payment. |
| msnfp\_disbursementdistributionid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_isadjusted | Boolean | Award |
| msnfp\_isadjustedname | Virtual | N/A |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_posteddate | DateTime | The date the payment was posted to the GL |
| msnfp\_recipientaccountid | Lookup | Recipient Account |
| msnfp\_recipientaccountidname | String | N/A |
| msnfp\_recipientaccountidyominame | String | N/A |
| msnfp\_recipientcontactid | Lookup | Recipient Contact |
| msnfp\_recipientcontactidname | String | N/A |
| msnfp\_recipientcontactidyominame | String | N/A |
| msnfp\_requestdate | DateTime | The date the Payment was requested. |
| msnfp\_scheduledpaymentdate | DateTime | The date the Payment is scheduled to be sent. |
| msnfp\_sentdate | DateTime | The date the Payment was sent. |
| msnfp\_status | Picklist | Status of the Payment. |
| msnfp\_statusname | Virtual | N/A |
| msnfp\_type | Picklist | The type of Payment. |
| msnfp\_typename | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Disbursement Distribution |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Disbursement Distribution |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Docket

A Docket is used to associate inquiries (LOIs) and requests with a specific grant/award cycle or date (usually a review/board meeting) on which a foundation will make final decisions on applications.  It's very important that Foundations have a great deal of flexibility in creating multiple relationship types between Dockets and Applications. Dockets roll up programs that are related in mission, in geographic region, in timing, or other common attributes.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_assignedtoid | Lookup | Assigned To |
| msnfp\_assignedtoidname | String | N/A |
| msnfp\_assignedtoidyominame | String | N/A |
| msnfp\_awardrecipientid | Customer |  |
| msnfp\_awardrecipientidname | String | N/A |
| msnfp\_awardrecipientidtype | EntityName | N/A |
| msnfp\_awardrecipientidyominame | String | N/A |
| msnfp\_docket\_fiscalsponsor | Customer |  |
| msnfp\_docket\_fiscalsponsoridtype | EntityName | N/A |
| msnfp\_docket\_fiscalsponsorname | String | N/A |
| msnfp\_docket\_fiscalsponsoryominame | String | N/A |
| msnfp\_docketid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_internalduedate | DateTime | Date the Docket is scheduled to be completed. |
| msnfp\_name | String | N/A |
| msnfp\_status | Picklist | Indicates the current status of the Docket. |
| msnfp\_statusname | Virtual | N/A |
| msnfp\_summarydescription | Memo | Short description; longer content may be added as an attachment. |
| msnfp\_type | Picklist | The type of Docket. |
| msnfp\_typename | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Docket |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Docket |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Donor Commitment

Donor commitments track the frequency with which constituents donate funds to a nonprofit or Foundation.  All nonprofits and Foundations seek to attract as many monthly/recurring/sustaining gifts or donor commitments that they can.  Other donors routinely give on a one-time basis.  Monthly givers require additional payment and transaction information tracking including payment method, schedules, in-kind pledge relevance, and more.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_anonymity | Picklist |  |
| msnfp\_anonymityname | Virtual | N/A |
| msnfp\_bookdate | DateTime | The date on which revenue will be recognized |
| msnfp\_commitment\_campaignid | Lookup | Campaign |
| msnfp\_commitment\_campaignidname | String | N/A |
| msnfp\_commitment\_defaultdesignationid | Lookup | Default Designation |
| msnfp\_commitment\_defaultdesignationidname | String | N/A |
| msnfp\_commitmentdate | DateTime | This is the date that the donor made the commitment, not necessarily the date that the commitment was entered into the system. |
| msnfp\_commitmenttype | Picklist |  |
| msnfp\_commitmenttypename | Virtual | N/A |
| msnfp\_dataentryreference | String |  |
| msnfp\_dataentrysource | Picklist |  |
| msnfp\_dataentrysourcename | Virtual | N/A |
| msnfp\_donorcommitment\_plannedgivingid | Lookup | Planned Giving |
| msnfp\_donorcommitment\_plannedgivingidname | String | N/A |
| msnfp\_donorcommitmentid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_expectedbydate | DateTime |  |
| msnfp\_isbookable | Boolean |  |
| msnfp\_isbookablename | Virtual | N/A |
| msnfp\_name | String | N/A |
| msnfp\_nextpaymentamount | Money |  |
| msnfp\_nextpaymentamount\_base | Money | Value of the Next Payment Amount in base currency. |
| msnfp\_nextpaymentdate | DateTime |  |
| msnfp\_pledgedbycontactid | Lookup | Pledged By Contact |
| msnfp\_pledgedbycontactidname | String | N/A |
| msnfp\_pledgedbycontactidyominame | String | N/A |
| msnfp\_pledgedonaccountid | Lookup | Pledged On Account |
| msnfp\_pledgedonaccountidname | String | N/A |
| msnfp\_pledgedonaccountidyominame | String | N/A |
| msnfp\_receiveddate | DateTime |  |
| msnfp\_totalamount | Money |  |
| msnfp\_totalamount\_base | Money | Value of the Total Amount in base currency. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Donor Commitment |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Donor Commitment |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Education

Biographical information about the education institutions a contact attended or is attending, the areas of study (major/minor) concentrated on, activities and roles served, preferences (football booster, patron of the on-campus art museum, etc.), and the start and end dates associated with this information.  It's particularly important for mid-level and major gift fundraisers based in the United States to understand someone's university/college alumni/alumnae network and peers in order to build a bigger qualified prospect pipeline.  University/college association is not as relevant or important in the UK, for example, compared to the US.  Nonprofit organizations with a bigger focus on major gifts care more about tracking educational information at a deeper level.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_classyear | Integer | Year in which Graduation occurred. |
| msnfp\_completionyear | Integer | Year in which Degree/Certificate was obtained. |
| msnfp\_degreeorcertificate | Picklist | Degree/Certificate associated with Education History being entered. |
| msnfp\_degreeorcertificatename | Virtual | N/A |
| msnfp\_departmentorcollegeid | Lookup | Unique identifier for Account associated with Education. |
| msnfp\_departmentorcollegeidname | String | N/A |
| msnfp\_departmentorcollegeidyominame | String | N/A |
| msnfp\_education\_contactid | Lookup | Contact |
| msnfp\_education\_contactidname | String | N/A |
| msnfp\_education\_contactidyominame | String | N/A |
| msnfp\_educationid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_fieldofstudy1 | Picklist | Major associated with Education History being entered. |
| msnfp\_fieldofstudy1name | Virtual | N/A |
| msnfp\_fieldofstudy2 | Picklist | Additional major or minor associated with Education History being entered. |
| msnfp\_fieldofstudy2name | Virtual | N/A |
| msnfp\_firstyearattended | Integer | Start year for Education History being selected. |
| msnfp\_grade | String | The grade associated with Education History being entered. |
| msnfp\_institutionid | Lookup | Unique identifier for Account associated with Education. |
| msnfp\_institutionidname | String | N/A |
| msnfp\_institutionidyominame | String | N/A |
| msnfp\_lastyearattended | Integer | End year for Education History being selected. |
| msnfp\_name | String | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Education |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Education |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Employment History

Historical and/or current information about where a contact works, volunteers or serves in some capacity at an organization.  For nonprofits, tracking employer information is critical for a few reasons: it is important to understand if the employee is part of a eligible matching gift program, to have visibility into an employee's "network" and to visualize the degrees of separation between an employee and other prospective donors that the organization wants to solicit, and more.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_currentemployment | Boolean | Is this record a presumed current position? |
| msnfp\_currentemploymentname | Virtual | N/A |
| msnfp\_employerid | Lookup | Employer |
| msnfp\_employeridname | String | N/A |
| msnfp\_employeridyominame | String | N/A |
| msnfp\_employername | String | Employer Name |
| msnfp\_employmentenddate | DateTime | End Date of work. |
| msnfp\_employmenthistoryid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_employmentstartdate | DateTime | Start Date of work. |
| msnfp\_industry | Picklist | Type of Industry that the employee has worked for. |
| msnfp\_industryname | Virtual | N/A |
| msnfp\_name | String | N/A |
| msnfp\_occupation | Picklist | Occupation of the employee. |
| msnfp\_occupationname | Virtual | N/A |
| msnfp\_title | String | Title of the Job or position of the employee. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Employment History |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Employment History |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Delivery Framework

A Framework is a Management Unit of work defined by the organization or entyty doing the work. It may be a large program of work, a small project or any other logical grouping of work and resources. Frameworks can be organized hierarchically and are related to Objectives.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_account | Lookup | Account |
| msnfp\_accountname | String | N/A |
| msnfp\_accountyominame | String | N/A |
| msnfp\_description | Memo | Description of the Framework. |
| msnfp\_enddate | DateTime | End date of the Framework. |
| msnfp\_deliveryframeworkid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_deliveryframeworktype | Picklist | The type of Framwork, i.e. Program, Project, Initiative, Activity |
| msnfp\_deliveryframeworktypename | Virtual | N/A |
| msnfp\_goal | Memo | Indicates the goal of the Framework. |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_objectiveid | Lookup | Objective |
| msnfp\_objectiveidname | String | N/A |
| msnfp\_scope | Picklist | Scope of the Framework. |
| msnfp\_scopename | Virtual | N/A |
| msnfp\_startdate | DateTime | Start date off the Framework. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Framework |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Framework |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Indicator

An Indicator describes what will be measured to track evidence of a Result. Indicators can be qualitative or quantitative and may or may not be aggregable. Indicators may be but are not required to be linked to standardized frameworks.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_ascending | Boolean | An IATI boolean describing the behaviour of the indicator. It is “true” if the indicator improves from small to large (e.g. clinics built); false if it improves from large to small (e.g. cases of a di |
| msnfp\_ascendingname | Virtual | N/A |
| msnfp\_baselinevalue | String | An IATI string definining the Baseline value for the value being reported. |
| msnfp\_description | Memo | Description |
| msnfp\_enddate | DateTime | End date of the Indicator. |
| msnfp\_deliveryframeworkid | Lookup | Framework |
| msnfp\_deliveryframeworkidname | String | N/A |
| msnfp\_indicatorid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_measure | String | An IATI code defining the unit of measure in which the value is reported. |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_objectiveid | Lookup | Objective |
| msnfp\_objectiveidname | String | N/A |
| msnfp\_resultid | Lookup | Result |
| msnfp\_resultidname | String | N/A |
| msnfp\_startdate | DateTime | Start Date of the Indicator |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Indicator |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Indicator |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Indicator Value

An Indicator Value is a quantitative or qualitative value of measurement of an Indicator. Indicator Values may be but are not limited to baseline, target or actual values of measurement.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_description | Memo | Description |
| msnfp\_enddate | DateTime | End date of the Indicator Value. |
| msnfp\_deliveryframeworkid | Lookup | Framework |
| msnfp\_deliveryframeworkidname | String | N/A |
| msnfp\_indicatorid | Lookup | Indicator |
| msnfp\_indicatoridname | String | N/A |
| msnfp\_indicatorvalueid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_objectiveid | Lookup | Objective |
| msnfp\_objectiveidname | String | N/A |
| msnfp\_startdate | DateTime | Start date of the Indicator Value. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Indicator Value |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Indicator Value |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |
|  |  |  |
|  |  |  |
|  |  |  |

# Objective

Represents the organization's highest priorities, strategies and/or goals that guide investments (in the case of Requests and Awards) and program delivery. Objectives can be represented in a hierarchy and/or linked to external standards based references.

Used for the purpose of reporting on goals or strategies outside of program boundaries.  For example, "Advocacy" may be an objective of both "Health Care" and "Education". An objective is often a step above program in terms of hierarchy.  So, a Foundation may have 5 key objectives to fund for a particular fiscal year.  Related and underneath objectives like Advocacy, Job Training, and Literarcy might be any number of additional, related programs, all of which are seeking to award grants to qualified grant seekers.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_description | Memo | Description of the Objective. |
| msnfp\_enddate | DateTime | End date of the objective |
| msnfp\_name | String | N/A |
| msnfp\_objective\_accountid | Lookup | Account |
| msnfp\_objective\_accountidname | String | N/A |
| msnfp\_objective\_accountidyominame | String | N/A |
| msnfp\_objectiveid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_objectivetype | Picklist | Indicates the type of Objective. |
| msnfp\_objectivetypename | Virtual | N/A |
| msnfp\_parentobjectiveid | Lookup | Parent Objective |
| msnfp\_parentobjectiveidname | String | N/A |
| msnfp\_startdate | DateTime | Start date off the objective |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Objective |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Objective |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# OFAC Match

Prospective, pending and closed "deals" or gifts.  This entity allows nonprofit organizations to track their efforts to build relationships with prospective donors.   The following information is commonly tracked on opportunities:  assigned fundraiser(s), ask amounts, campaigns designated funds given to, etc.   Opportunity pipeline management allows development and gift officers to forecast likely gifts by when they are going to close, very similar to the way a salesperson tracks and manages sales opportunities.  It must be possible in a CRM or application to associate an opportunity to a campaign to measure the ROI of specific marketing programs.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_inquiryid | Lookup | Inquiry / Lead |
| msnfp\_inquiryidname | String | N/A |
| msnfp\_inquiryidyominame | String | N/A |
| msnfp\_matchtype | String | Indicates if a match exists. |
| msnfp\_name | String | N/A |
| msnfp\_ofacmatch\_customer | Customer |  |
| msnfp\_ofacmatch\_customeridtype | EntityName | N/A |
| msnfp\_ofacmatch\_customername | String | N/A |
| msnfp\_ofacmatch\_customeryominame | String | N/A |
| msnfp\_ofacmatchid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_reportdate | DateTime | The Date that the OFAC Report was retrieved |
| msnfp\_requestid | Lookup | Request |
| msnfp\_requestidname | String | N/A |
| msnfp\_sdnname | String | Name of SDN match. |
| msnfp\_sdnnumber | String | Number of SDN match. |
| msnfp\_title | String | Title of SDN match. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the OFAC Match |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the OFAC Match |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Payment Asset

Specific types of payments, including in-kind gifts, stock and securities that are classified as assets require non-profits to follow specific reporting rules.  Managing these gifts tends to be very manual work for nonprofit development operations staff.  These gifts come in through a bank, must be manually reviewed and entered into a batch.  Often there are questions that need to be answered before a gift entry can be completed with ease.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_amount | Money |  |
| msnfp\_amount\_base | Money | Value of the Amount in base currency. |
| msnfp\_assettype | Picklist |  |
| msnfp\_assettypename | Virtual | N/A |
| msnfp\_bookdate | DateTime |  |
| msnfp\_description | Memo |  |
| msnfp\_name | String | N/A |
| msnfp\_originalassetadjustedid | Lookup | Original Asset Gift Adjusted |
| msnfp\_originalassetadjustedidname | String | N/A |
| msnfp\_paymentasset\_pledgedasset | Lookup | Pledged Asset |
| msnfp\_paymentasset\_pledgedassetname | String | N/A |
| msnfp\_paymentassetcategory | Picklist |  |
| msnfp\_paymentassetcategoryname | Virtual | N/A |
| msnfp\_paymentassetid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_paymentassetsubcategory | Picklist |  |
| msnfp\_paymentassetsubcategoryname | Virtual | N/A |
| msnfp\_pledgedonpaymentscheduleid | Lookup | Pledged On Payment Schedule |
| msnfp\_pledgedonpaymentscheduleidname | String | N/A |
| msnfp\_quantity | Decimal |  |
| msnfp\_symbol | String |  |
| msnfp\_transferredontransactionid | Lookup | Transferred On Transaction |
| msnfp\_transferredontransactionidname | String | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Payment Asset |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Payment Asset |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Payment Method

This is a parent entity for Payment Method customizations that may be supported by an application.  Possible extensions could be to support credit cards, EFT, cryptocurrency, mobile payments, or rewards points.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_comments | Memo |  |
| msnfp\_isdefault | Boolean |  |
| msnfp\_isdefaultname | Virtual | N/A |
| msnfp\_lastauthenticationstatus | Picklist |  |
| msnfp\_lastauthenticationstatusdate | DateTime |  |
| msnfp\_lastauthenticationstatusdetail | String |  |
| msnfp\_lastauthenticationstatusname | Virtual | N/A |
| msnfp\_lastauthenticationstatustechnicaldetail | String |  |
| msnfp\_name | String | N/A |
| msnfp\_paymentmethodid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_payorid | Lookup | Payor Account |
| msnfp\_payoridname | String | N/A |
| msnfp\_payoridyominame | String | N/A |
| msnfp\_type | Picklist |  |
| msnfp\_typename | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Payment Method |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Payment Method |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Payment Processor

This is a placeholder entity referenced by the Payment Method object. It is intended to be customized with configuration data necessary to connect to a payment processor and authorize payments.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_name | String | N/A |
| msnfp\_paymentprocessorid | Uniqueidentifier | Unique identifier for entity instances |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Payment Processor |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Payment Processor |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Payment Schedule

A gift transaction can be a one-time payment or a recurring payment (ie, monthly/sustainer giving). In addition, it can be a pledge (ie, promise) of a future payment or a current/received payment.The payment schedule sets out the cadence and conditions for realizing these payments.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_firstpaymentdate | DateTime | Date of first payment |
| msnfp\_frequency | Picklist | iCal compliant recurrence field |
| msnfp\_frequencyinterval | Integer | iCal compliant recurrence field |
| msnfp\_frequencyname | Virtual | N/A |
| msnfp\_lastpaymentdate | DateTime | The date by which the payment schedule is expected to be fully paid. |
| msnfp\_name | String | N/A |
| msnfp\_nextpaymentamount | Money |  |
| msnfp\_nextpaymentamount\_base | Money | Value of the Next Payment Amount in base currency. |
| msnfp\_nextpaymentdate | DateTime |  |
| msnfp\_numberofpayments | Integer |  |
| msnfp\_omtsched\_defaulthardcredittocustomer | Customer |  |
| msnfp\_omtsched\_defaulthardcredittocustomeridtype | EntityName | N/A |
| msnfp\_omtsched\_defaulthardcredittocustomername | String | N/A |
| msnfp\_omtsched\_defaulthardcredittocustomeryominame | String | N/A |
| msnfp\_paymentschedule\_donorcommitmentid | Lookup | Donor Commitment |
| msnfp\_paymentschedule\_donorcommitmentidname | String | N/A |
| msnfp\_paymentscheduleid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_receiptonaccountid | Lookup | Receipt on Account |
| msnfp\_receiptonaccountidname | String | N/A |
| msnfp\_receiptonaccountidyominame | String | N/A |
| msnfp\_recurringamount | Money | This will include both the Base and Donor Currencies |
| msnfp\_recurringamount\_base | Money | Value of the Recurring Amount in base currency. |
| msnfp\_totalamount | Money | This will include both the Base and Donor Currencies |
| msnfp\_totalamount\_base | Money | Value of the Total Amount in base currency. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Payment Schedule |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Payment Schedule |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Planned Giving

A planned gift is a major gift made during a donor's lifetime or at the time of their death that involves their estate and tax planning.  There are many forms of planned giving, but the three most common vehicles are CRTs (Charitable Remainder Trusts), Bequests and Annuities, which all have different tax benefits and financial reconciliation guidelines for the nonprofit organization. Planned gifts are in contrast to annual gifts, which are made through a donor's discretionary income and not tied to an estate.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_actualpercentofestaterecieved | Decimal | Actual percent of donor estate received by organization |
| msnfp\_affiliation | Picklist | Represents groups within the organization. |
| msnfp\_affiliationname | Virtual | N/A |
| msnfp\_amountperfrequency | Money | Amount distributed to organization per defined frequency. |
| msnfp\_amountperfrequency\_base | Money | Value of the Amount Per Frequency in base currency. |
| msnfp\_annualmarketvalue | Money | Annual Market Value provided by official valuation source such as Kaspick. |
| msnfp\_annualmarketvalue\_base | Money | Value of the Annual Market Value in base currency. |
| msnfp\_annualmarketvaluedate | DateTime | Date Annual Market Value provided by official valuation source such as Kaspick. |
| msnfp\_annualpayment | Money | Annual Payment to organization. |
| msnfp\_annualpayment\_base | Money | Value of the Annual Payment in base currency. |
| msnfp\_anticipatedannualpayment | Money | Anticipated Annual Payment to organization. |
| msnfp\_anticipatedannualpayment\_base | Money | Value of the Anticipated Annual Payment in base currency. |
| msnfp\_anticipateddistributiondateoftrust | DateTime | Anticipated distribution date of trust typically provided by executor, trustee or attorney or in estate documentation. |
| msnfp\_anticipatedpercentoftrust | Decimal | Anticipated percent of trust that will go to the organization. This is typically provided by executor, trustee or attorney or in estate documentation. |
| msnfp\_appraisaldate | DateTime | Date the appraisal was conducted. |
| msnfp\_appraisalvalue | Money | Value of the appraised item or asset from qualified appraiser |
| msnfp\_appraisalvalue\_base | Money | Value of the Appraisal Value in base currency. |
| msnfp\_bequesttype | Picklist | Is the Bequest a Living Trust, Will, or both? |
| msnfp\_bequesttypename | Virtual | N/A |
| msnfp\_capitalgainincome | Money | Beneficiary's taxable capital gain income portion of life insurance income. |
| msnfp\_capitalgainincome\_base | Money | Value of the Capital Gain Income in base currency. |
| msnfp\_cashsurrendervalue | Money | The current Cash Surrender Value of the insurance policy. |
| msnfp\_cashsurrendervalue\_base | Money | Value of the Cash Surrender Value in base currency. |
| msnfp\_charitablededuction | Money | Calculated Charitable Deduction for Planned Giving. |
| msnfp\_charitablededuction\_base | Money | Value of the Charitable Deduction in base currency. |
| msnfp\_contractdate | DateTime | Date funding will start as specified on the Contract. |
| msnfp\_costbasis | Money | Original purchase price of funding asset. |
| msnfp\_costbasis\_base | Money | Value of the Cost Basis in base currency. |
| msnfp\_dateclaimformsrecieved | DateTime | Date Claim Forms Received. |
| msnfp\_dateclaimformssubmitted | DateTime | Date Claim Forms Submitted. |
| msnfp\_dateestateclosed | DateTime | Date a management agreement is signed as provided by executor, trustee or attorney. |
| msnfp\_datemanagementagreementsigned | DateTime | Date a management agreement is signed as provided by executor, trustee or attorney. |
| msnfp\_datestationnotifiedofdeath | DateTime | Date your organization is notified of the donor's death. |
| msnfp\_datestationnotifiedofintention | DateTime | Date organization Notified of Intention to give a Planned Giving. |
| msnfp\_datestationnotifiedtomakeclaim | DateTime | Date Organization notified to make a claim. |
| msnfp\_datewillexecuted | DateTime | Date Will Executed as provided in estate documentation. |
| msnfp\_deceased | Boolean | Indicates the Contact is Deceased. |
| msnfp\_deceasedday | Picklist | Day the Contact was deceased. |
| msnfp\_deceaseddayname | Virtual | N/A |
| msnfp\_deceasedmonth | Picklist | Month the Contact was deceased. |
| msnfp\_deceasedmonthname | Virtual | N/A |
| msnfp\_deceasedname | Virtual | N/A |
| msnfp\_deceasedyear | Picklist | Year the Contact was deceased. |
| msnfp\_deceasedyearname | Virtual | N/A |
| msnfp\_deferredtodate | DateTime | Same as date of first payment when more than one year after the contract date. |
| msnfp\_designatedorganizationpercent | Decimal | Percent of remainder designated to organization |
| msnfp\_designatedprincipleamount | Money | Amount of principle designated to organization. |
| msnfp\_designatedprincipleamount\_base | Money | Value of the Designated Principle Amount in base currency. |
| msnfp\_designation | Picklist | Usage of gift funds will be unrestricted, restricted or permanently restricted. |
| msnfp\_designationname | Virtual | N/A |
| msnfp\_discountrate | Decimal | Interest rate a central bank charges depository institutions that borrow reserves from it. |
| msnfp\_discountratemonth | Picklist | Month in which latest Discount Rate was populated. |
| msnfp\_discountratemonthname | Virtual | N/A |
| msnfp\_discountrateyear | Picklist | Year in which latest Discount Rate was populated. |
| msnfp\_discountrateyearname | Virtual | N/A |
| msnfp\_endowmenttype | Picklist | Specific endowment at organization where gift will be applied. |
| msnfp\_endowmenttypename | Virtual | N/A |
| msnfp\_estimatedgivingamount | Money | Estimated amount organization will receive as provided by executor, trustee, or attorney. |
| msnfp\_estimatedgivingamount\_base | Money | Value of the Estimated Giving Amount in base currency. |
| msnfp\_estimatedtrustprobatedate | DateTime | Estimated Date Trust/Probate received as provided by executor, trustee or attorney or in estate documentation. |
| msnfp\_expectedfinaldistributiondate | DateTime | Expected Date of Final Distribution, typically information provided by executor, trustee or attorney. |
| msnfp\_expectedfirstdistributiondate | DateTime | Expected Date of First Distribution, typically information provided by executor, trustee or attorney. |
| msnfp\_externalid | String | ID from External or Legacy system. |
| msnfp\_facevalue | Money | Value of funds donated. |
| msnfp\_facevalue\_base | Money | Value of the Face Value in base currency. |
| msnfp\_fundid | Lookup | Unique identifier for Account associated with Planned Giving. |
| msnfp\_fundidname | String | N/A |
| msnfp\_fundidyominame | String | N/A |
| msnfp\_givingamount | Integer | Sum of gifts entered on this record (logic field). |
| msnfp\_givingreceiveddate | DateTime | Date distribution or remainder for Planned Giving is received. |
| msnfp\_givingsubtype | Picklist | Specific type of Planned Giving instrument. |
| msnfp\_givingsubtypename | Virtual | N/A |
| msnfp\_insuranceannualpremium | Money | Annual Premium of the Life Insurance. |
| msnfp\_insuranceannualpremium\_base | Money | Value of the Insurance Annual Premium in base currency. |
| msnfp\_insurancecompany | String | Insurance Company for related to this Planned Giving. |
| msnfp\_insurancedeathbenefitamount | Integer | Death Benefit Amount from Insurance. |
| msnfp\_insurancepolicycode | String | Insurance policy code related to this Planned Giving. |
| msnfp\_insurancepolicyname | Memo | Insurance Policy Name for this Planned Giving. |
| msnfp\_insurancepremiumduedate | DateTime | Insurance Premium Due Date related to this Planned Giving record. |
| msnfp\_insurancepremiumpaymentaddress | Memo | Address for the Life Insurance Premium Payment. |
| msnfp\_isrevocable | Boolean | Related trust may be amended, altered or revoked by its settlor at any time, provided the settlor is not mentally incapacitated. |
| msnfp\_isrevocablename | Virtual | N/A |
| msnfp\_leadsource | Picklist | Method of communication that prompted Donor to discuss Planned Giving options. |
| msnfp\_leadsourcename | Virtual | N/A |
| msnfp\_name | String | N/A |
| msnfp\_ordinaryincome | Money | Income other than capital gain. Examples of Ordinary income can consist of income from wages, salaries, tips, commissions, bonuses, and other types of compensation from employment. |
| msnfp\_ordinaryincome\_base | Money | Value of the Ordinary Income in base currency. |
| msnfp\_paymentfrequency | Picklist | Defined frequency payments are distributed to the organization. |
| msnfp\_paymentfrequencyname | Virtual | N/A |
| msnfp\_payoutrate | Decimal | Dollar amount per share a Corporation pays for their dividend. |
| msnfp\_plannedgiving\_campaignid | Lookup | Campaign |
| msnfp\_plannedgiving\_campaignidname | String | N/A |
| msnfp\_plannedgiving\_pledgedbycontactid | Lookup | Pledged By Contact |
| msnfp\_plannedgiving\_pledgedbycontactidname | String | N/A |
| msnfp\_plannedgiving\_pledgedbycontactidyominame | String | N/A |
| msnfp\_plannedgivingid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_pledgesonaccountid | Lookup | Unique identifier for Account associated with Planned Giving. |
| msnfp\_pledgesonaccountidname | String | N/A |
| msnfp\_pledgesonaccountidyominame | String | N/A |
| msnfp\_presentvalue | Money | The value on a given date of a payment or series of payments made at other times for an investment. |
| msnfp\_presentvalue\_base | Money | Value of the Present Value in base currency. |
| msnfp\_recordtype | String | Type of Planned Giving record. |
| msnfp\_remainderamount | Money | Remainder $ value a Charitable Organization receives. |
| msnfp\_remainderamount\_base | Money | Value of the Remainder Amount in base currency. |
| msnfp\_rollupgiving | DateTime | Populated by trigger, reflects the most recent Date/Time for Giving record. |
| msnfp\_salvagevalueofbuildings | Money | Estimated value of property at the end of its useful life. It is what you expect to get for the property if you sell it after you can no longer use it productively. |
| msnfp\_salvagevalueofbuildings\_base | Money | Value of the Salvage Value of Buildings in base currency. |
| msnfp\_severdate | DateTime | The term end date' or the date of the related Contact's death. |
| msnfp\_stage | Picklist | The current phase the giving record. |
| msnfp\_stagename | Virtual | N/A |
| msnfp\_taxfreeincome | Money | The tax free income from the asset related to this giving record. |
| msnfp\_taxfreeincome\_base | Money | Value of the Tax Free Income in base currency. |
| msnfp\_termenddate | DateTime | Term end date for the asset related to the Planned Giving record. |
| msnfp\_termtype | Picklist | Term type for the asset related to the Planned Giving record. |
| msnfp\_termtypename | Virtual | N/A |
| msnfp\_termyears | Integer | Term years for the asset related to the Planned Giving record. |
| msnfp\_totalestatevalue | Money | Total Estate Value as provided by executor, trustee or attorney or in estate documentation. |
| msnfp\_totalestatevalue\_base | Money | Value of the Total Estate Value in base currency. |
| msnfp\_trustmarketvalue | Money | Trust Market Value related to this planned giving record. |
| msnfp\_trustmarketvalue\_base | Money | Value of the Trust Market Value in base currency. |
| msnfp\_trustprobatenoticedate | DateTime | Date Trust/Probate Notice received. |
| msnfp\_trustvaluedate | DateTime | Trust Value Date related to this planned giving record. |
| msnfp\_typeofmanagement | Picklist | The type of management for the underlying asset or assets related to this Planned Giving record. |
| msnfp\_typeofmanagementname | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Planned Giving |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Planned Giving |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Preference

Typically tracks an abundance of constituent or organization information that doesn't live cleanly on an account or contact record, or that can be associated with both an Account and a Contact.  Examples:  personal interests, additional communication preferences like desire to receive a newsletter, specific outreach the constituent wants, and additional affiliation information like Constituent Type associations and ratings.

Preferences also typically store demographic information in a series of dependent picklists: Category, Subcategory, Type, Subtype. Most commonly, only two or three of the fields in this dependent hierarchy will be used.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_confidence | Picklist | Specifies the confidence that the Preference is accurate. |
| msnfp\_confidencename | Virtual | N/A |
| msnfp\_enddate | DateTime | Indicates the date this preference ends and ceases to be valid. |
| msnfp\_key | Picklist | The referenced Preference Key to which this record attaches a value or "true" |
| msnfp\_keyname | Virtual | N/A |
| msnfp\_name | String | N/A |
| msnfp\_preference\_customer | Customer |  |
| msnfp\_preference\_customeridtype | EntityName | N/A |
| msnfp\_preference\_customername | String | N/A |
| msnfp\_preference\_customeryominame | String | N/A |
| msnfp\_preference\_opportunityid | Lookup | Opportunity |
| msnfp\_preference\_opportunityidname | String | N/A |
| msnfp\_preferenceid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_priority | Integer | A numeric priority that may be used to disambiguate multiple preference values expressed for the same key, which may have differing effective dates. |
| msnfp\_startdate | DateTime | Indicates the date this preference begins. |
| msnfp\_value | String | The user-entered value that may be attached to the referenced key. If none is present, default interpretation is "true" |
| msnfp\_weight | Integer | Holds an integral value that may be incremented as the preference is re-expressed or emphasized by the Customer |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Preference |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Preference |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Recommendation

This is the mechanism through which Foundations provide recommendations back to an Award applicant in the form of additional requested information, clarification of previously submitted information, and any other information the Foundation must collect to process a Request to completition.  When an Award applicant logs into an Award portal or the Foundation's website, they will receive notification of a recommendation, which is essentially a request for additional information.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_communicationchannel | Picklist | The media used to communicate the Recommendation |
| msnfp\_communicationchannelname | Virtual | N/A |
| msnfp\_date | DateTime | Date the Recommendation was made. |
| msnfp\_datesubmitted | DateTime | Date Recommendation was submitted. |
| msnfp\_description | Memo | Description of the Recommendation. |
| msnfp\_name | String | N/A |
| msnfp\_recommendation\_leadid | Lookup | Lead |
| msnfp\_recommendation\_leadidname | String | N/A |
| msnfp\_recommendation\_leadidyominame | String | N/A |
| msnfp\_recommendationid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_recommenderaccountid | Lookup | On Behalf of Account |
| msnfp\_recommenderaccountidname | String | N/A |
| msnfp\_recommenderaccountidyominame | String | N/A |
| msnfp\_recommendercontactid | Lookup | Recommended by Contact |
| msnfp\_recommendercontactidname | String | N/A |
| msnfp\_recommendercontactidyominame | String | N/A |
| msnfp\_requestid | Lookup | Request |
| msnfp\_requestidname | String | N/A |
| msnfp\_status | Picklist | Status of the Recommendation. |
| msnfp\_statusname | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Recommendation |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Recommendation |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Report

A status report submitted by an awardee to the granting entity (i.e., a Foundation) to report on what impact has been accomplished to date through the funds awarded to them. There are often strict reporting guidelines in place at a Foundation, and specific information and updates a grant awardee must submit in order to be in "good standing" with the Foundation.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_award | Lookup | Award |
| msnfp\_awardname | String | N/A |
| msnfp\_awardversionid | Lookup | Award Version |
| msnfp\_awardversionidname | String | N/A |
| msnfp\_description | Memo | Description of the Report. |
| msnfp\_duedate | DateTime | Date Report is due. |
| msnfp\_name | String | N/A |
| msnfp\_primarycontactid | Lookup | Unique identifier for Contact associated with Report. |
| msnfp\_primarycontactidname | String | N/A |
| msnfp\_primarycontactidyominame | String | N/A |
| msnfp\_report\_accountid | Lookup | Account |
| msnfp\_report\_accountidname | String | N/A |
| msnfp\_report\_accountidyominame | String | N/A |
| msnfp\_report\_leadid | Lookup | Lead |
| msnfp\_report\_leadidname | String | N/A |
| msnfp\_report\_leadidyominame | String | N/A |
| msnfp\_report\_submittedbyid | Lookup | Unique identifier for Contact associated with Report. |
| msnfp\_report\_submittedbyidname | String | N/A |
| msnfp\_report\_submittedbyidyominame | String | N/A |
| msnfp\_reportid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_requestid | Lookup | Request |
| msnfp\_requestidname | String | N/A |
| msnfp\_status | Picklist | Status of the Report. |
| msnfp\_statusname | Virtual | N/A |
| msnfp\_submitteddate | DateTime | Date Report was submitted. |
| msnfp\_type | Picklist | Type of Report. |
| msnfp\_typename | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Report |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Report |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Request

Represents a request from an individual or institution for funding or support. A request is more formal than an inquiry (LOI) and typically happens after an inquiry has already occurred.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_amountprojected | Money | Projected amount to be received from awarding entity (as contrasted to amount requested and amount received). |
| msnfp\_amountprojected\_base | Money | Value of the Amount Projected in base currency. |
| msnfp\_amountrecommended | Money | Recommended Award amount. |
| msnfp\_amountrecommended\_base | Money | Value of the Amount Recommended in base currency. |
| msnfp\_amountrequested | Money | Amount requested in proposal (as contrasted to amount expected and amount received). |
| msnfp\_amountrequested\_base | Money | Value of the Amount Requested in base currency. |
| msnfp\_applicationid | String | Internal ID for the Application. |
| msnfp\_conflictofinterestdetail | String | Description of a conflict of interest, if any. |
| msnfp\_conflictofintereststatus | Picklist | Indicates the type of conflict of interest, if any. |
| msnfp\_conflictofintereststatusname | Virtual | N/A |
| msnfp\_docketid | Lookup | Docket |
| msnfp\_docketidname | String | N/A |
| msnfp\_fiscalsponsorid | Lookup | Fiscal Sponsor |
| msnfp\_fiscalsponsoridname | String | N/A |
| msnfp\_fiscalsponsoridyominame | String | N/A |
| msnfp\_initialapplicationchannel | Picklist | Method by which the initial application was received. |
| msnfp\_initialapplicationchannelname | Virtual | N/A |
| msnfp\_leadid | Lookup | Lead |
| msnfp\_leadidname | String | N/A |
| msnfp\_leadidyominame | String | N/A |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_purpose | Memo | Summary of the purpose of the Request proposal that is one-paragraph. Include what, where, when, and why. |
| msnfp\_recipientid | Customer |  |
| msnfp\_recipientidname | String | N/A |
| msnfp\_recipientidtype | EntityName | N/A |
| msnfp\_recipientidyominame | String | N/A |
| msnfp\_renewalofawardid | Lookup | Renewal Of Request |
| msnfp\_renewalofawardidname | String | N/A |
| msnfp\_requestedduration | Integer | Requested duration of the Award in months |
| msnfp\_requestedstartdate | DateTime | Date that funding is requested to begin |
| msnfp\_requestid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_requesttype | Picklist | Type or Designation of Request |
| msnfp\_requesttypename | Virtual | N/A |
| msnfp\_requirements | String | Link to Request requirements |
| msnfp\_stage | Picklist | The stage the Request is currently in. |
| msnfp\_stagename | Virtual | N/A |
| msnfp\_submittedbyid | Lookup | Submitted By |
| msnfp\_submittedbyidname | String | N/A |
| msnfp\_submittedbyidyominame | String | N/A |
| msnfp\_submitteddate | DateTime | Date the Request was received by the awarding organization |
| msnfp\_totalprojectbudget | Money | Total Project Budget, which may be in excess of a requested or awarded amount |
| msnfp\_totalprojectbudget\_base | Money | Value of the Total Project Budget in base currency. |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Request |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Request |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Result

A Result is a container that represents the changes in the context in which an organization operates. Results can be qualitative or quantitative, may be outputs, outcomes or impacts and may or may not be aggregable. Results may be but are not required to be linked to standardized frameworks.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_aggregationstatus | Boolean | Indicates whether the data in the result set are suitable for aggregation |
| msnfp\_aggregationstatusname | Virtual | N/A |
| msnfp\_description | Memo | Description |
| msnfp\_enddate | DateTime | End Date of the result |
| msnfp\_deliveryframeworkid | Lookup | Framework |
| msnfp\_deliveryframeworkidname | String | N/A |
| msnfp\_name | String | The name of the custom entity. |
| msnfp\_objectiveid | Lookup | Objective |
| msnfp\_objectiveidname | String | N/A |
| msnfp\_resultid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_resulttype | Picklist | An IATI code for the type of result being reported. |
| msnfp\_resulttypename | Virtual | N/A |
| msnfp\_startdate | DateTime | Start Date of the result |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Result |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Result |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Review

The internal assessment of a Request made by a staff member (or team) and all of the relevant information that needs to be tracked at the "review" stage of an application.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_awardid | Lookup | Award |
| msnfp\_awardidname | String | N/A |
| msnfp\_awardversionid | Lookup | Award Version |
| msnfp\_awardversionidname | String | N/A |
| msnfp\_datesubmitted | DateTime | Date Review was submitted. |
| msnfp\_description | Memo | Description of the Review. |
| msnfp\_duedate | DateTime | Date the review is due. |
| msnfp\_name | String | N/A |
| msnfp\_requestid | Lookup | Request |
| msnfp\_requestidname | String | N/A |
| msnfp\_review\_docketid | Lookup | Docket |
| msnfp\_review\_docketidname | String | N/A |
| msnfp\_review\_leadid | Lookup | Lead |
| msnfp\_review\_leadidname | String | N/A |
| msnfp\_review\_leadidyominame | String | N/A |
| msnfp\_review\_reportid | Lookup | Report |
| msnfp\_review\_reportidname | String | N/A |
| msnfp\_reviewdate | DateTime | Date the review was conducted. |
| msnfp\_reviewerid | Lookup | Reviewer |
| msnfp\_revieweridname | String | N/A |
| msnfp\_revieweridyominame | String | N/A |
| msnfp\_reviewertype | Picklist | Indicates the type of Reviewer. |
| msnfp\_reviewertypename | Virtual | N/A |
| msnfp\_reviewid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_status | Picklist | Status of the Review. |
| msnfp\_statusname | Virtual | N/A |
| msnfp\_type | Picklist | The type of Review. |
| msnfp\_typename | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Review |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Review |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Salutation

The way a donor or prospect is commonly addressed via written communication (lhard-copy letters, emails, etc.).  It is typical for nonprofits and foundations to address major donors by different salutations depending on the scenario.  A Medical Doctor could be addressed as "Doctor" when the organization reaches out regarding in-country field volunteerism the person performs.  On the other hand, the same individual might be referred to as Mrs. Smith as part of her household being solicited for a major gift.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_addresslabelline1 | String | The first line of the address label when printing an envelope >Mr John Smith Mrs Wilma Smith 1234 Main Street Anytown, USA 11111 |
| msnfp\_addresslabelline2 | String | This is the 2nd line of the envelope usually the 2nd person in the household if applicable Mr John Smith >Mrs Wilma Smith 1234 Main Street Anytown, USA 11111 |
| msnfp\_addresslabelline3 | String | This is the 3rd line of the address which could be an Organization name or a C/O Mr John Smith Mrs Wilma Smith c/o Anytown Company 1234 Main Street Anytown, USA 11111 |
| msnfp\_communicationmethod | Picklist | Indicates that this Salutation should be applied when the Customer is contacted via the indicated communication channel |
| msnfp\_communicationmethodname | Virtual | N/A |
| msnfp\_constituenttype | Picklist | Indicates that this Salutation should be applied when the Customer is contacted in their capacity as the indicated ConstituentType |
| msnfp\_constituenttypename | Virtual | N/A |
| msnfp\_firstname | String | First Name |
| msnfp\_fullname | String | Full Name |
| msnfp\_insidesalutation | String | This is the information that appears after the word Dear on the letter sent to the donor. |
| msnfp\_ispreferred | Boolean | Indicates that this Salutation may be applied by business logic when matches on other selection criteria (Comm. method, Account, Constituent Type) are not found. |
| msnfp\_ispreferredname | Virtual | N/A |
| msnfp\_lastname | String | Last Name |
| msnfp\_middlename | String | Middle Name |
| msnfp\_name | String | N/A |
| msnfp\_onbehalfofaccount | Boolean | Indicates that this Salutation should be applied when the Customer is contacted in the capacity of their role on the indicated Account. |
| msnfp\_onbehalfofaccountname | Virtual | N/A |
| msnfp\_salutation\_customer | Customer |  |
| msnfp\_salutation\_customeridtype | EntityName | N/A |
| msnfp\_salutation\_customername | String | N/A |
| msnfp\_salutation\_customeryominame | String | N/A |
| msnfp\_salutationid | Uniqueidentifier | Unique identifier for entity instances |
| msnfp\_suffix | Picklist | Suffix |
| msnfp\_suffixname | Virtual | N/A |
| msnfp\_title | Picklist | Prefix |
| msnfp\_titlename | Virtual | N/A |
| msnfp\_type | Picklist | Indicates that this Salutation should be applied when the Customer is contacted for the indicated category of mailing or acknowledgement. |
| msnfp\_typename | Virtual | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Salutation |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Salutation |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Transaction

Transactions (also referred to as donations) represent payments from the donor, contact, account or organization to the nonprofit.  Transaction records must track valuable information about the gift or items transferred from a constituent to a nonprofit organization.  Critical transaction information to capture and provide audit capabilities around include what payment method was used, what channel the gift came in through, whether an adjustment was made (and on what date for what amount?), when was the transaction received vs. processed vs. reconciled and more.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| createdby | Lookup | Unique identifier of the user who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Unique identifier of the delegate user who created the record. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| exchangerate | Decimal | Exchange rate for the currency associated with the entity with respect to the base currency. |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| modifiedby | Lookup | Unique identifier of the user who modified the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Unique identifier of the delegate user who modified the record. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_adjustmentcomment | Memo | Any notes or details about the adjustment that the user may have optionally entered. |
| msnfp\_adjustmentreason | Picklist |  |
| msnfp\_adjustmentreasonname | Virtual | N/A |
| msnfp\_adjustmenttype | Picklist |  |
| msnfp\_adjustmenttypename | Virtual | N/A |
| msnfp\_amount | Money |  |
| msnfp\_amount\_base | Money | Value of the Amount in base currency. |
| msnfp\_anonymity | Picklist |  |
| msnfp\_anonymityname | Virtual | N/A |
| msnfp\_bookdate | DateTime |  |
| msnfp\_dataentryreference | String | Tracks data origin of payment transactions. References may be channel-specific. |
| msnfp\_dataentrysource | Picklist |  |
| msnfp\_dataentrysourcename | Virtual | N/A |
| msnfp\_effectivecampaignid | Lookup | Effective Campaign |
| msnfp\_effectivecampaignidname | String | N/A |
| msnfp\_effectivesourcecode | String |  |
| msnfp\_exchangeratedate | DateTime | The date and time at which the currency exchange rate was determined |
| msnfp\_isadjusted | Boolean | Indicates that this transaction has been adjusted by a later transaction. |
| msnfp\_isadjustedname | Virtual | N/A |
| msnfp\_name | String | N/A |
| msnfp\_originaltxnadjustedid | Lookup | Original Transaction Adjusted |
| msnfp\_originaltxnadjustedidname | String | N/A |
| msnfp\_originatingcampaignid | Lookup | Originating Campaign |
| msnfp\_originatingcampaignidname | String | N/A |
| msnfp\_originatingsourcecode | String | The marketing segmentation source code. |
| msnfp\_posteddate | DateTime |  |
| msnfp\_receiveddate | DateTime |  |
| msnfp\_transaction\_paymentmethodid | Lookup | Payment Method |
| msnfp\_transaction\_paymentmethodidname | String | N/A |
| msnfp\_transaction\_paymentscheduleid | Lookup | Payment Schedule |
| msnfp\_transaction\_paymentscheduleidname | String | N/A |
| msnfp\_transaction\_receiptonaccountid | Lookup | Receipt On Account |
| msnfp\_transaction\_receiptonaccountidname | String | N/A |
| msnfp\_transaction\_receiptonaccountidyominame | String | N/A |
| msnfp\_transactionid | Uniqueidentifier | Unique identifier for entity instances |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| statecode | State | Status of the Transaction |
| statecodename | Virtual | N/A |
| statuscode | Status | Reason for the status of the Transaction |
| statuscodename | Virtual | N/A |
| timezoneruleversionnumber | Integer | For internal use only. |
| transactioncurrencyid | Lookup | Unique identifier of the currency associated with the entity. |
| transactioncurrencyidname | String | N/A |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |

# Opportunity

Prospective, pending and closed "deals" or gifts. This entity allows nonprofit organizations to track their efforts to build relationships with prospective donors. The following information is commonly tracked on opportunities: assigned fundraiser(s), ask amounts, campaigns designated funds given to, etc. Opportunity pipeline management allows development and gift officers to forecast likely gifts by when they are going to close, very similar to the way a salesperson tracks and manages sales opportunities. It must be possible in a CRM or application to associate an opportunity to a campaign to measure the ROI of specific marketing programs.

|  |  |  |
| --- | --- | --- |
| **Logical Name** | **Type** | **Description** |
| accountid | Lookup | Unique identifier of the account with which the opportunity is associated. |
| accountidname | String | N/A |
| accountidyominame | String | N/A |
| actualclosedate | DateTime | Shows the date and time when the opportunity was closed or canceled. |
| actualvalue | Money | Type the actual revenue amount for the opportunity for reporting and analysis of estimated versus actual sales. Field defaults to the Est. Revenue value when an opportunity is won. |
| actualvalue\_base | Money | Value of the Actual Revenue in base currency. |
| budgetamount | Money | Type a value between 0 and 1,000,000,000,000 to indicate the lead's potential available budget. |
| budgetamount\_base | Money | Value of the Budget Amount in base currency. |
| budgetstatus | Picklist | Select the likely budget status for the lead's company. This may help determine the lead rating or your sales approach. |
| budgettypename | Virtual | N/A |
| campaignid | Lookup | Shows the campaign that the opportunity was created from. The ID is used for tracking the success of the campaign. |
| campaignidname | String | N/A |
| captureproposalfeedback | Boolean | Choose whether the proposal feedback has been captured for the opportunity. |
| captureproposalfeedbackname | Virtual | N/A |
| closeprobability | Integer | Type a number from 0 to 100 that represents the likelihood of closing the opportunity. This can aid the sales team in their efforts to convert the opportunity in a sale. |
| completefinalproposal | Boolean | Select whether a final proposal has been completed for the opportunity. |
| completefinalproposalname | Virtual | N/A |
| completeinternalreview | Boolean | Select whether an internal review has been completed for this opportunity. |
| completeinternalreviewname | Virtual | N/A |
| confirminterest | Boolean | Select whether the lead confirmed interest in your offerings. This helps in determining the lead quality and the probability of it turning into an opportunity. |
| confirminterestname | Virtual | N/A |
| contactid | Lookup | Unique identifier of the contact associated with the opportunity. |
| contactidname | String | N/A |
| contactidyominame | String | N/A |
| createdby | Lookup | Shows who created the record. |
| createdbyname | String | N/A |
| createdbyyominame | String | N/A |
| createdon | DateTime | Date and time when the record was created. |
| createdonbehalfby | Lookup | Shows who created the record on behalf of another user. |
| createdonbehalfbyname | String | N/A |
| createdonbehalfbyyominame | String | N/A |
| currentsituation | Memo | Type notes about the company or organization associated with the opportunity. |
| customerid | Customer | Select the customer account or contact to provide a quick link to additional customer details, such as address, phone number, activities, and orders. |
| customeridname | String | N/A |
| customeridtype | EntityName | N/A |
| customeridyominame | String | N/A |
| customerneed | Memo | Type some notes about the customer's requirements, to help the sales team identify products and services that could meet their requirements. |
| customerpainpoints | Memo | Type notes about the customer's pain points to help the sales team identify products and services that could address these pain points. |
| decisionmaker | Boolean | Select whether your notes include information about who makes the purchase decisions at the lead's company. |
| decisionmakername | Virtual | N/A |
| description | Memo | Type additional information to describe the opportunity, such as possible products to sell or past purchases from the customer. |
| developproposal | Boolean | Select whether a proposal has been developed for the opportunity. |
| developproposalname | Virtual | N/A |
| discountamount | Money | Type the discount amount for the opportunity if the customer is eligible for special savings. |
| discountamount\_base | Money | Value of the Opportunity Discount Amount in base currency. |
| discountpercentage | Decimal | Type the discount rate that should be applied to the Product Totals field to include additional savings for the customer in the opportunity. |
| emailaddress | String | The primary email address for the entity. |
| estimatedclosedate | DateTime | Enter the expected closing date of the opportunity to help make accurate revenue forecasts. |
| estimatedvalue | Money | Type the estimated revenue amount to indicate the potential sale or value of the opportunity for revenue forecasting. This field can be either system-populated or editable based on the selection in the Revenue field. |
| estimatedvalue\_base | Money | Value of the Est. Revenue in base currency. |
| evaluatefit | Boolean | Select whether the fit between the lead's requirements and your offerings was evaluated. |
| evaluatefitname | Virtual | N/A |
| exchangerate | Decimal | Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency. |
| filedebrief | Boolean | Choose whether the sales team has recorded detailed notes on the proposals and the account's responses. |
| filedebriefname | Virtual | N/A |
| finaldecisiondate | DateTime | Enter the date and time when the final decision of the opportunity was made. |
| freightamount | Money | Type the cost of freight or shipping for the products included in the opportunity for use in calculating the Total Amount field. |
| freightamount\_base | Money | Value of the Freight Amount in base currency. |
| identifycompetitors | Boolean | Select whether information about competitors is included. |
| identifycompetitorsname | Virtual | N/A |
| identifycustomercontacts | Boolean | Select whether the customer contacts for this opportunity have been identified. |
| identifycustomercontactsname | Virtual | N/A |
| identifypursuitteam | Boolean | Choose whether you have recorded who will pursue the opportunity. |
| identifypursuitteamname | Virtual | N/A |
| importsequencenumber | Integer | Sequence number of the import that created this record. |
| initialcommunication | Picklist | Choose whether someone from the sales team contacted this lead earlier. |
| initialcommunicationname | Virtual | N/A |
| isprivate | Boolean | Indicates whether the opportunity is private or visible to the entire organization. |
| isprivatename | Virtual | N/A |
| isrevenuesystemcalculated | Boolean | Select whether the estimated revenue for the opportunity is calculated automatically based on the products entered or entered manually by a user. |
| isrevenuesystemcalculatedname | Virtual | N/A |
| lastonholdtime | DateTime | Contains the date time stamp of the last on hold time. |
| modifiedby | Lookup | Shows who last updated the record. |
| modifiedbyname | String | N/A |
| modifiedbyyominame | String | N/A |
| modifiedon | DateTime | Date and time when the record was modified. |
| modifiedonbehalfby | Lookup | Shows who last updated the record on behalf of another user. |
| modifiedonbehalfbyname | String | N/A |
| modifiedonbehalfbyyominame | String | N/A |
| msnfp\_askreadiness | Picklist | Disposition of constituent toward committing to determined Pledge ask amount. |
| msnfp\_askreadinessname | Virtual | N/A |
| msnfp\_expectedgivingamount | Money | Populated by trigger, displays the sum of all Expected Giving Amounts. |
| msnfp\_expectedgivingamount\_base | Money | Value of the Expected Giving Amount in base currency. |
| msnfp\_opportunity\_defaultdesignationid | Lookup | Default Designation |
| msnfp\_opportunity\_defaultdesignationidname | String | N/A |
| msnfp\_primaryproposalid | Lookup | Primary Proposal |
| msnfp\_primaryproposalidname | String | N/A |
| msnfp\_prospectivegifttype | Picklist |  |
| msnfp\_prospectivegifttypename | Virtual | N/A |
| msnfp\_solicitationtype | Picklist | Giving Type being solicited (Renewal, Additional, etc) or communication medium to donor (TV, Radio, Raffle, etc). This value is copied from associated Campaign at gift creation, and can be manually changed if necessary. |
| msnfp\_solicitationtypename | Virtual | N/A |
| msnfp\_sourcecode | String | Organization defined unique code for associated Campaign. This value is copied from associated Campaign at gift creation. |
| name | String | Type a subject or descriptive name, such as the expected order or company name, for the opportunity. |
| need | Picklist | Choose how high the level of need is for the lead's company. |
| needname | Virtual | N/A |
| onholdtime | Integer | Shows the duration in minutes for which the opportunity was on hold. |
| opportunityid | Uniqueidentifier | Unique identifier of the opportunity. |
| opportunityratingcode | Picklist | Select the expected value or priority of the opportunity based on revenue, customer status, or closing probability. |
| opportunityratingcodename | Virtual | N/A |
| originatingleadid | Lookup | Choose the lead that the opportunity was created from for reporting and analytics. The field is read-only after the opportunity is created and defaults to the correct lead when an opportunity is created from a converted lead. |
| originatingleadidname | String | N/A |
| originatingleadidyominame | String | N/A |
| overriddencreatedon | DateTime | Date and time that the record was migrated. |
| ownerid | Owner | Owner Id |
| owneridname | String | Name of the owner |
| owneridtype | EntityName | Owner Id Type |
| owneridyominame | String | Yomi name of the owner |
| owningbusinessunit | Lookup | Unique identifier for the business unit that owns the record |
| owningteam | Lookup | Unique identifier for the team that owns the record. |
| owninguser | Lookup | Unique identifier for the user that owns the record. |
| parentaccountid | Lookup | Choose an account to connect this opportunity to, so that the relationship is visible in reports and analytics, and to provide a quick link to additional details, such as financial information and activities. |
| parentaccountidname | String | N/A |
| parentaccountidyominame | String | N/A |
| parentcontactid | Lookup | Choose a contact to connect this opportunity to, so that the relationship is visible in reports and analytics. |
| parentcontactidname | String | N/A |
| parentcontactidyominame | String | N/A |
| participatesinworkflow | Boolean | Information about whether the opportunity participates in workflow rules. |
| participatesinworkflowname | Virtual | N/A |
| presentfinalproposal | Boolean | Select whether the final proposal has been presented to the account. |
| presentfinalproposalname | Virtual | N/A |
| presentproposal | Boolean | Select whether a proposal for the opportunity has been presented to the account. |
| presentproposalname | Virtual | N/A |
| pricelevelid | Lookup | Choose the price list associated with this record to make sure the products associated with the campaign are offered at the correct prices. |
| pricelevelidname | String | N/A |
| pricingerrorcode | Picklist | Pricing error for the opportunity. |
| pricingerrorcodename | Virtual | N/A |
| prioritycode | Picklist | Select the priority so that preferred customers or critical issues are handled quickly. |
| prioritycodename | Virtual | N/A |
| processid | Uniqueidentifier | Contains the id of the process associated with the entity. |
| proposedsolution | Memo | Type notes about the proposed solution for the opportunity. |
| purchaseprocess | Picklist | Choose whether an individual or a committee will be involved in the purchase process for the lead. |
| purchaseprocessname | Virtual | N/A |
| purchasetimeframe | Picklist | Choose how long the lead will likely take to make the purchase. |
| purchasetimeframename | Virtual | N/A |
| pursuitdecision | Boolean | Select whether the decision about pursuing the opportunity has been made. |
| pursuitdecisionname | Virtual | N/A |
| qualificationcomments | Memo | Type comments about the qualification or scoring of the lead. |
| quotecomments | Memo | Type comments about the quotes associated with the opportunity. |
| resolvefeedback | Boolean | Choose whether the proposal feedback has been captured and resolved for the opportunity. |
| resolvefeedbackname | Virtual | N/A |
| salesstage | Picklist | Select the sales stage of this opportunity to aid the sales team in their efforts to win this opportunity. |
| salesstagecode | Picklist | Select the sales process stage for the opportunity to indicate the probability of closing the opportunity. |
| salesstagecodename | Virtual | N/A |
| salesstagename | Virtual | N/A |
| schedulefollowup\_prospect | DateTime | Enter the date and time of the prospecting follow-up meeting with the lead. |
| schedulefollowup\_qualify | DateTime | Enter the date and time of the qualifying follow-up meeting with the lead. |
| scheduleproposalmeeting | DateTime | Enter the date and time of the proposal meeting for the opportunity. |
| sendthankyounote | Boolean | Select whether a thank you note has been sent to the account for considering the proposal. |
| sendthankyounotename | Virtual | N/A |
| slaid | Lookup | Choose the service level agreement (SLA) that you want to apply to the opportunity record. |
| slainvokedid | Lookup | Last SLA that was applied to this opportunity. This field is for internal use only. |
| slainvokedidname | String | N/A |
| slaname | String | N/A |
| stageid | Uniqueidentifier | Contains the id of the stage where the entity is located. |
| statecode | State | Shows whether the opportunity is open, won, or lost. Won and lost opportunities are read-only and can't be edited until they are reactivated. |
| statecodename | Virtual | N/A |
| statuscode | Status | Select the opportunity's status. |
| statuscodename | Virtual | N/A |
| stepid | Uniqueidentifier | Shows the ID of the workflow step. |
| stepname | String | Shows the current phase in the sales pipeline for the opportunity. This is updated by a workflow. |
| teamsfollowed | Integer | Number of users or conversations followed the record |
| timeline | Picklist | Select when the opportunity is likely to be closed. |
| timelinename | Virtual | N/A |
| timespentbymeonemailandmeetings | String | Total time spent for emails (read and write) and meetings by me in relation to the opportunity record. |
| timezoneruleversionnumber | Integer | For internal use only. |
| totalamount | Money | Shows the total amount due, calculated as the sum of the products, discounts, freight, and taxes for the opportunity. |
| totalamount\_base | Money | Value of the Total Amount in base currency. |
| totalamountlessfreight | Money | Shows the total product amount for the opportunity, minus any discounts. This value is added to freight and tax amounts in the calculation for the total amount of the opportunity. |
| totalamountlessfreight\_base | Money | Value of the Total Pre-Freight Amount in base currency. |
| totaldiscountamount | Money | Shows the total discount amount, based on the discount price and rate entered on the opportunity. |
| totaldiscountamount\_base | Money | Value of the Total Discount Amount in base currency. |
| totallineitemamount | Money | Shows the sum of all existing and write-in products included on the opportunity, based on the specified price list and quantities. |
| totallineitemamount\_base | Money | Value of the Total Detail Amount in base currency. |
| totallineitemdiscountamount | Money | Shows the total of the Manual Discount amounts specified on all products included in the opportunity. This value is reflected in the Total Detail Amount field on the opportunity and is added to any discount amount or rate specified on the opportunity. |
| totallineitemdiscountamount\_base | Money | Value of the Total Line Item Discount Amount in base currency. |
| totaltax | Money | Shows the total of the Tax amounts specified on all products included in the opportunity, included in the Total Amount field calculation for the opportunity. |
| totaltax\_base | Money | Value of the Total Tax in base currency. |
| transactioncurrencyid | Lookup | Choose the local currency for the record to make sure budgets are reported in the correct currency. |
| transactioncurrencyidname | String | N/A |
| traversedpath | String | A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur. |
| utcconversiontimezonecode | Integer | Time zone code that was in use when the record was created. |
| versionnumber | BigInt | Version Number |