

Dynamics 365 Nonprofit Accelerator

Entity Reference Guide

**Published**: January 2019

**Version**: 1.1

Contents

[Overview 3](#_Toc534624621)

[Entity Relationship Diagrams 4](#_Toc534624622)

[Account 7](#_Toc534624623)

[Campaign 18](#_Toc534624624)

[Contact 22](#_Toc534624625)

[Address 34](#_Toc534624626)

[Lead 38](#_Toc534624627)

[Award 49](#_Toc534624628)

[Award Version 51](#_Toc534624629)

[Budget 53](#_Toc534624630)

[Disbursement Distribution 54](#_Toc534624631)

[Credit Plan 56](#_Toc534624632)

[Credit Plan Recipient 58](#_Toc534624633)

[Designated Credit 59](#_Toc534624634)

[Designation 61](#_Toc534624635)

[Designation Plan 63](#_Toc534624636)

[Disbursement 66](#_Toc534624637)

[Docket 68](#_Toc534624638)

[Donor Commitment 70](#_Toc534624639)

[Education 72](#_Toc534624640)

[Employment History 74](#_Toc534624641)

[Delivery Framework 76](#_Toc534624642)

[Indicator 78](#_Toc534624643)

[Indicator Value 79](#_Toc534624644)

[Objective 81](#_Toc534624645)

[OFAC Match 82](#_Toc534624646)

[Payment Asset 84](#_Toc534624647)

[Payment Method 86](#_Toc534624648)

[Payment Processor 88](#_Toc534624649)

[Payment Schedule 89](#_Toc534624650)

[Planned Giving 91](#_Toc534624651)

[Preference 98](#_Toc534624652)

[Recommendation 100](#_Toc534624653)

[Report 102](#_Toc534624654)

[Request 104](#_Toc534624655)

[Result 107](#_Toc534624656)

[Review 109](#_Toc534624657)

[Salutation 111](#_Toc534624658)

[Transaction 113](#_Toc534624659)

[Opportunity 116](#_Toc534624660)

# Overview

Applies To: Dynamics 365 (online)

The Microsoft Dynamics 365 Nonprofit Accelerator (“Accelerator”) is a solution released by Microsoft to help drive adoption of the Business Application Power Platform by nonprofit partners and providers, including the Common Data Model, The Common Data Services, Dynamics and Power BI. The Accelerator contains installable solutions that include standard entity attribute extensions, new nonprofit entities, pre-built dashboards, workflows, sample data as well as other tools to help customers and partners build and deploy new nonprofit solutions.

This documentation provides an overview of the key entities, attributes, relationships and metadata included in the Accelerator.

## Entities and Attributes

The Accelerator model contains a number of attribute extensions to existing Common Data Model entities as well as new entities. The prefix “msnfp” is consistent throughout all these extensions.

In this document, concepts that are mapped to existing entities, such as Account or Addresses, have the name of the existing entity in the title as well.

Additional metadata on the entities and the attributes can be found by installing the Accelerator and using the Dynamics metadata browser.

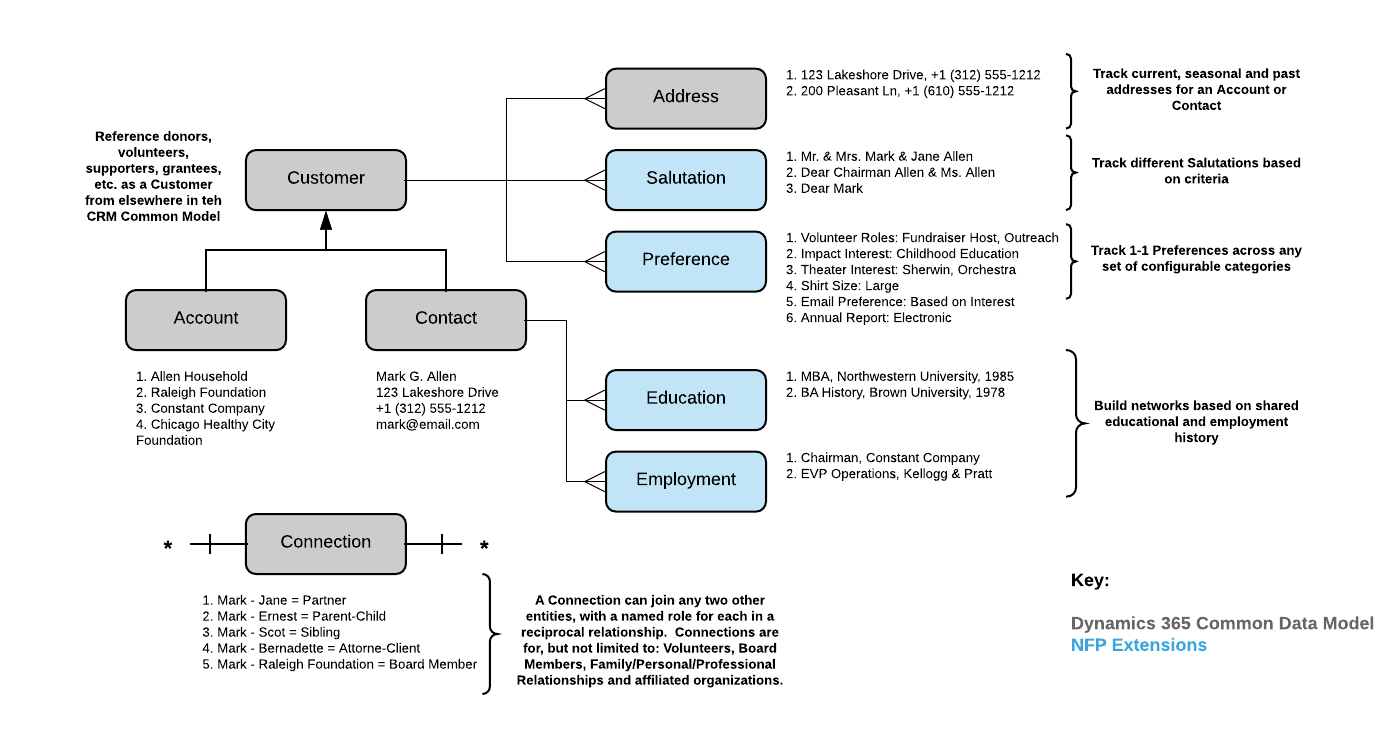
Additional Resources:

1. Learn more about the [Common Data Model](https://github.com/Microsoft/CDM)
2. Download the Dynamics 365 Nonproft Accelerator from [AppSource](https://appsource.microsoft.com/en-us/product/dynamics-365/msnfp.msftnonprofitcommondatamodel?src=office&tab=Overview)
3. The nonprofit common data model, solutions, data samples, Power BI Examples, SDK extensions and more are provided as part of the open-source creative license available on [GitHub](https://github.com/Microsoft/Dynamics-365-Industry-Accelerators/tree/master/nfp)
4. Information about Microsoft’s [Nonprofit Offerings](https://www.microsoft.com/en-us/nonprofits)
5. First Look at the [Nonprofit Accelerator](https://community.dynamics.com/365/b/dynamics365isvsuccess/archive/2018/11/08/a-first-look-at-the-dynamics-365-nonprofit-accelerator)
6. [Additional Topics](https://community.dynamics.com/365/b/dynamics365isvsuccess/archive/2018/08/01/dynamics-365-brings-industry-focus-through-the-microsoft-power-platform-and-solution-accelerators) about the accelerators

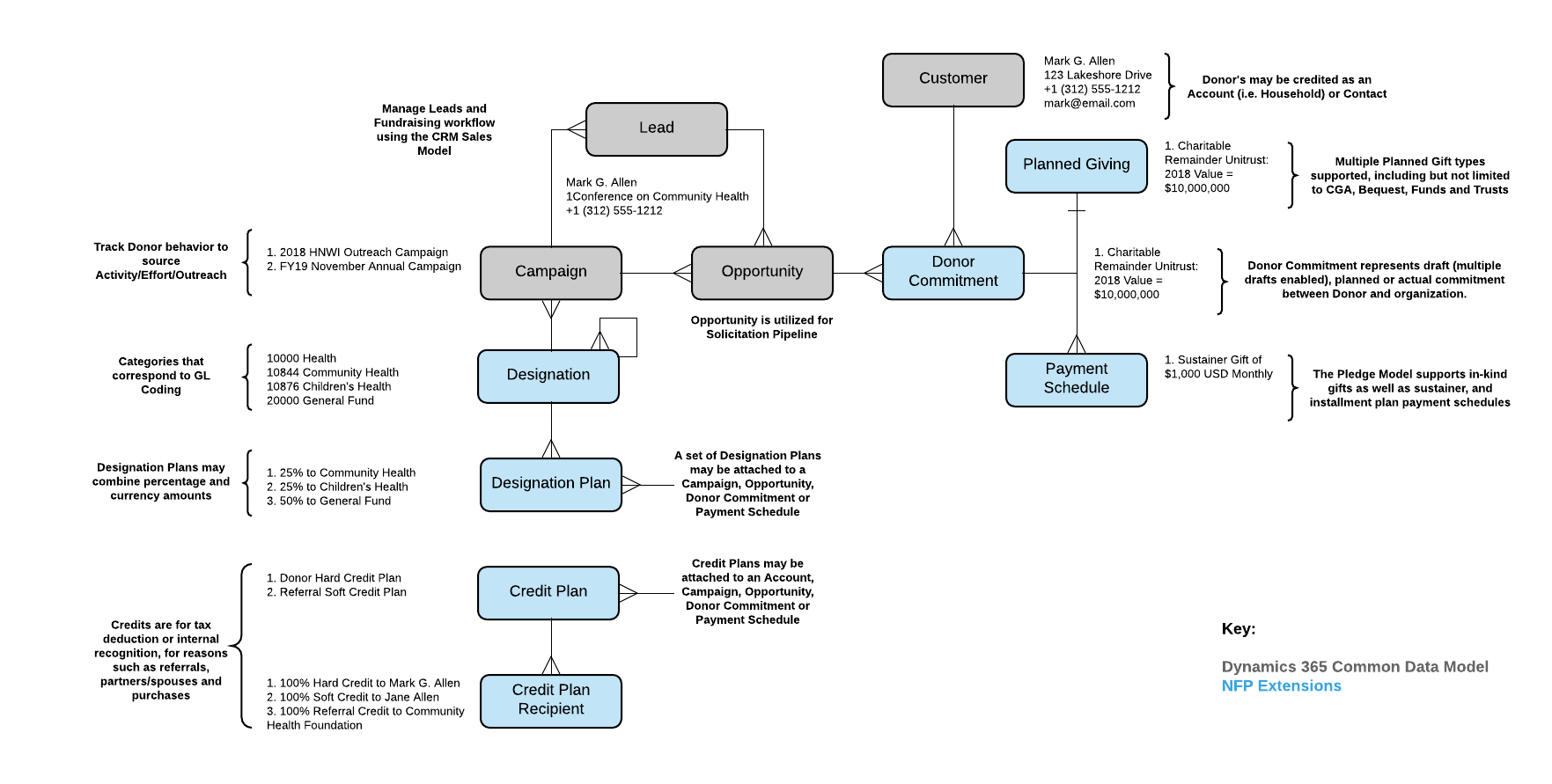
# Entity Relationship Diagrams

The following conceptual entity relationship diagrams provide overviews of key entity relationships and examples in the Common Data Model.

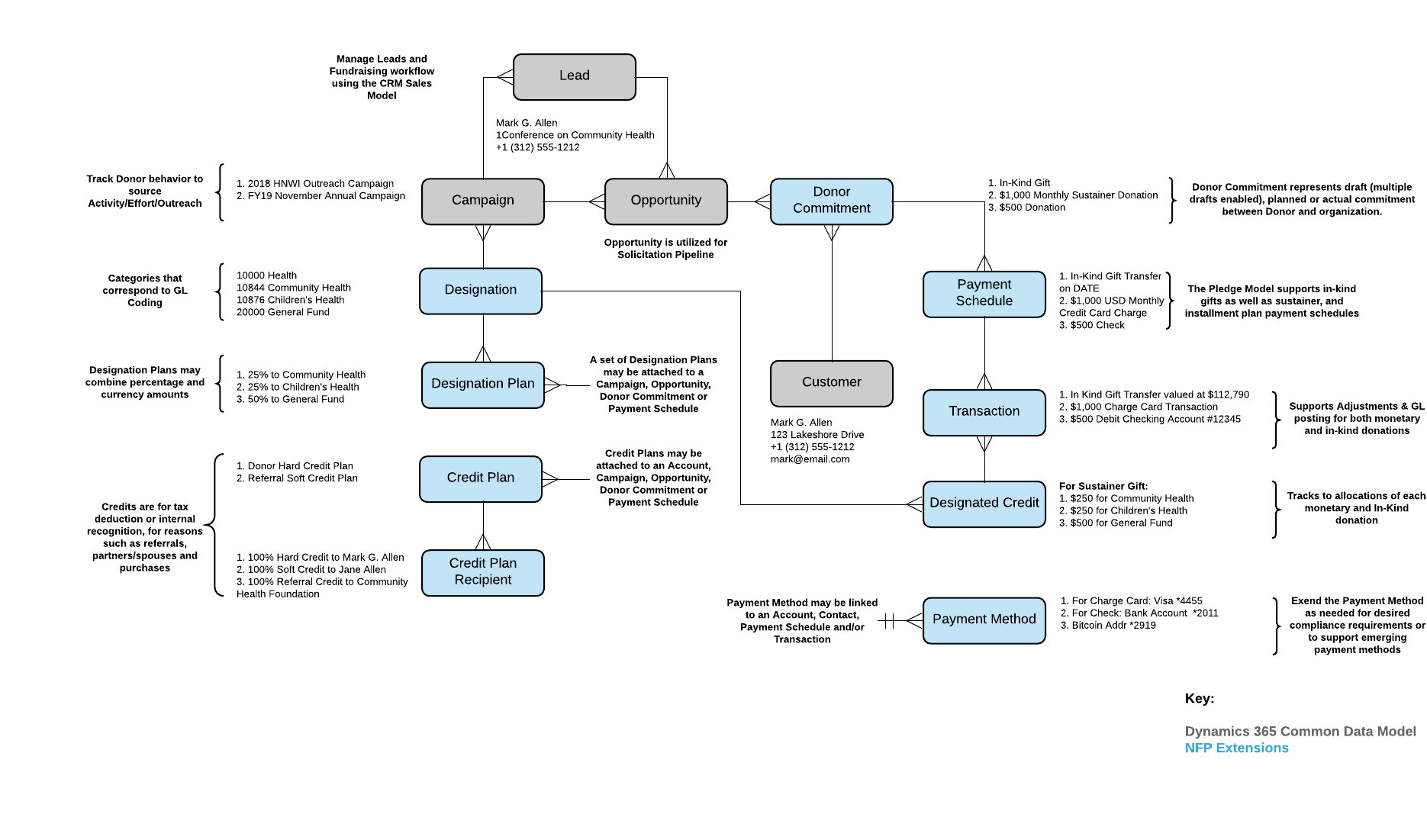
## How to Model a Constituent



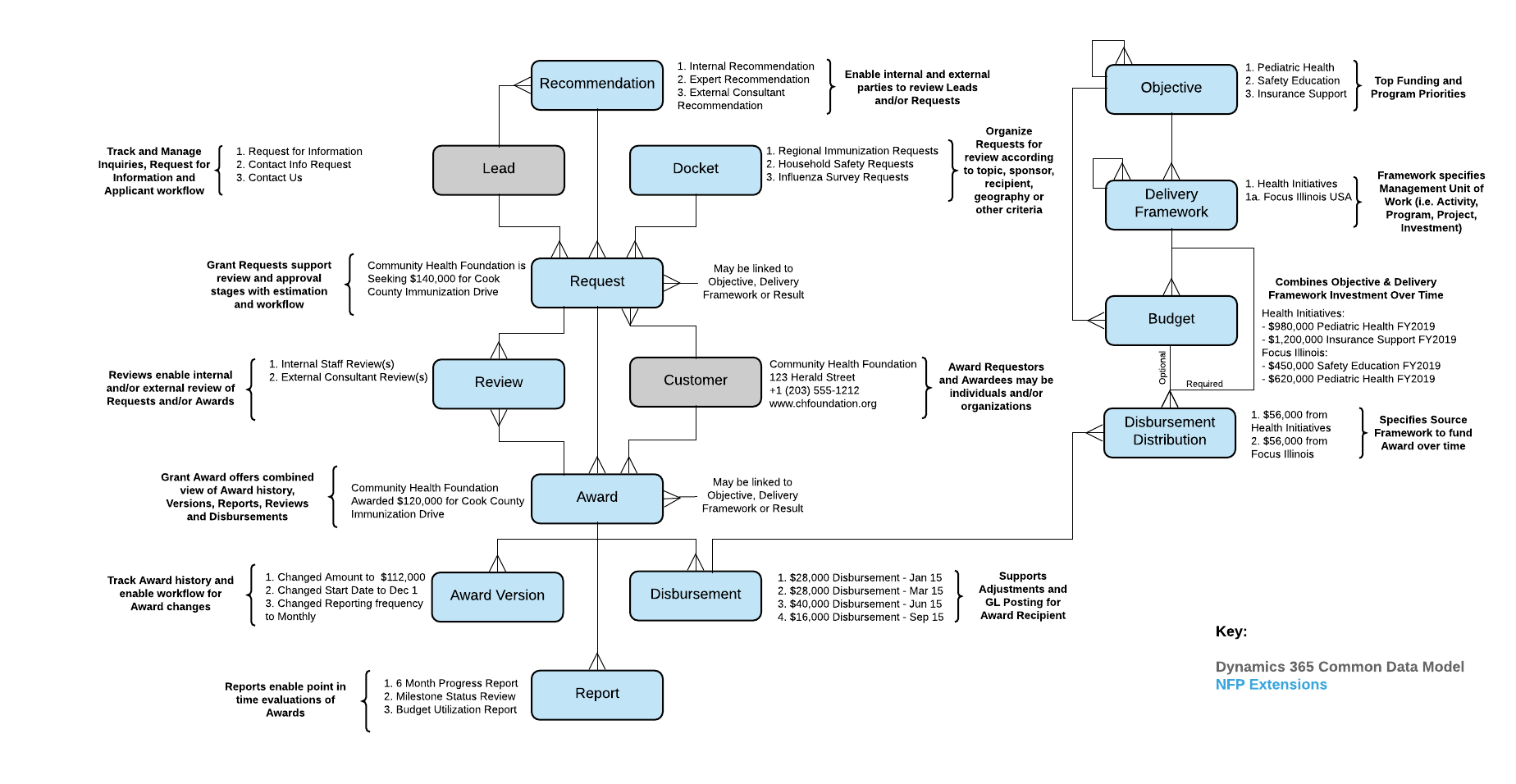
## How to Model Fundraising



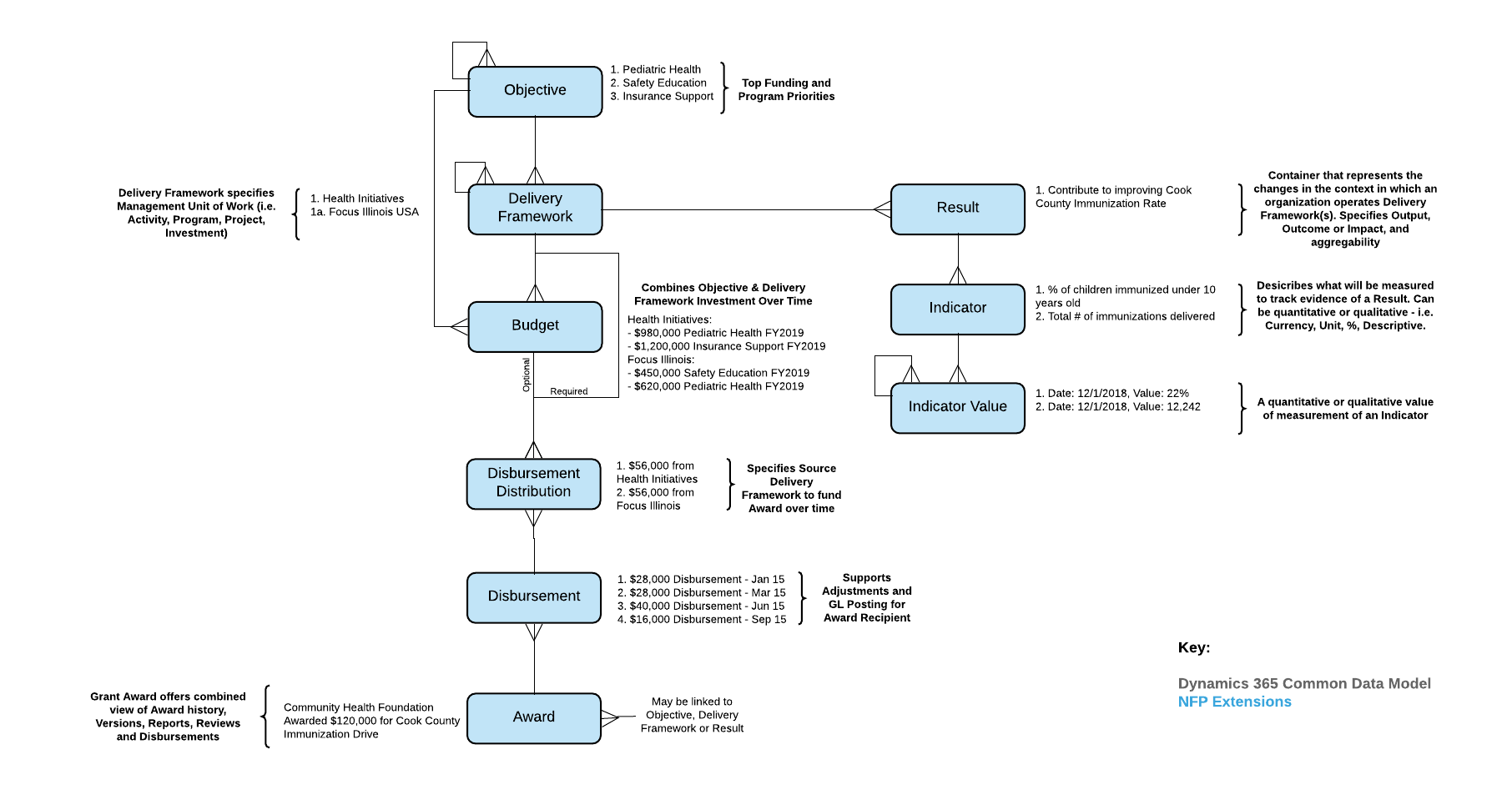
## How to Model a Donation



## How to Model Awards



## How to Model Program Delivery & Results



# Account

An account represents an organization or household that may be a donor, potential donor, supporter, related party, grant-seeker or grant-maker or program delivery entity. For nonprofits, accounts can be Organizations, Foundations or Households. The account entity can be extended to include any “type” of organizational entity – examples include but are not limited to schools, chapters, affiliates, geographic entities, organizational subsidiaries and organizational departments.

The following items can be linked with an Account:

* Address
* Award
* Connection
* Contact
* Credit Recipient
* Delivery Framework
* Designation Plan
* Disbursement
* Docket
* Donor Commitment
* Education
* Employment
* Lead
* Objective
* OFAC Match
* Opportunity
* Payment Method
* Payment Schedule
* Planned Giving
* Preference
* Recommendation
* Report
* Request
* Result
* Salutation
* Transaction

## Attributes

| **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 | Manually populated field indicating the type of Account. |
| 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 and/or outreach activities, the prospective and/or actualrecipients of campaign messaging and prospectively the giving that result from those campaign activities. 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.

This entity can be linked with the following entities:

* Account
* Contact
* Parent Campaign

## Attributes

| **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 one or more relationships. A contact can also be part of an organization.

This entity can be linked with the following entities:

* Account
* Reports To Contact
* Parent Contact

## Attributes

| **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

Addresses represent critical contact methods for an account or contact. Addresses include 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 (ie, 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.

This entity can be linked with the following entities:

* Account
* Contact
* Customer

## Attributes

| **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 | Indicates the address has been validated. |
| 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

Generally, Leads represent prospects or potential engagement opportunities with individuals and/or organizations. Leads are converted into accounts, contacts or opportunities when they are qualified. Otherwise, they are deleted or archived.

For Fundraising in the Nonprofit Accelerator, Leads may be prospective donors, registrants, volunteers and more.

For Awards in the Nonpfofit Accelerator, Leads can be leveraged for Letters of Inquiry (LOI). A LOI represents a preliminary request for funding that allows a grant/awarding organization to vet the requesting individual/organization before declining the inquiry or inviting the requestor to submit a more thorough request for an award. As a rule, the Lead/LOI should be less formal than a request. Accepted inquiries are converted into requests via a process called Lead Conversion.

This entity can be linked with the following entities:

* Account
* Contact
* Campaign
* Delivery Framework
* Docket

## Attributes

| **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

An Award represents 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.

This entity can be linked with the following entities:

* Request
* Docket
* Customer
* Account
* Contact

## 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\_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

An Award Version represents a point in time snapshot of the attributes of an Award.

This entity can be linked with the following entities:

* Award

## 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\_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

A Budget represents the amount of funds that can be awarded for a particular delivery framework (i.e Program, Project, Initiative, Activity) for a defined period of time (i.e. fiscal year).

The following items can be linked with a Budget:

* Delivery Framework
* Objective

## 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 |
| 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 |

# Disbursement Distribution

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

This entity can be linked with the following entities:

* Disbursement
* Budget

## 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 |
| 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 "count" for membership or other benefit prior to a payment actually being cleared. A Credit Plan shows up as 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.

This entity can be linked with the following entities:

* Account
* Campaign

## 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\_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 inconsistent from organization to organization

This entity can be linked with the following entities:

* Credit Plan

## 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\_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 indicates the partial amount that is hard- or soft-credited to a Customer and allocated to one Designation.

This entity can be linked with the following entities:

* Donor Commitment
* Designation
* Transaction

## 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 |
| 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.

This entity can be linked with the following entities:

* Parent Designation

## 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 |
| 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 fund.

This entity can be linked with the following entities:

* Designation
* Campaign
* Donor Commitment
* Payment Schedule
* Opportunity

## 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 |
| 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

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.

This entity can be linked with the following entities:

Award

## 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 |
| 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\_disbursementid | 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 group inquiries (LOIs) and/or requests with a specific grant/award cycle or date (usually a review/board meeting). This enables award making entities to more easily organize their work.

This entity can be linked with the following entities:

* Customer

## 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 represent the actual or prospective agreement between a donor and an organization for the donor to make a gift to the organization, including but not limited to Sustainer Pledges, Installment Pledges or In-kind Pledges. A donor commitment for a one time pledge represents the donor’s commitment to make the one time gift at a defined time in the future. A donor commitment for a sustaining pledge represents the donor’s commitment to make individual payments on a defined schedule over time. Donor Commitments are an aggregation point for pledges and are referenced by Planned Giving and Payment Schedules.

This entity can be linked with the following entities:

* Account
* Contact
* Campaign
* Designation
* Planned Giving

## 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 |
| 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

Education references biographical information about the educational institutions a contact attended or is attending, the areas of study (major/minor/certificate) 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.

This entity can be linked with the following entities:

* Account
* Contact
* Customer

## 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\_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

Employment History represents historical and/or current information about where a contact works, volunteers or serves in some capacity at an organization.

This entity can be linked with the following entities:

* Account
* Contact
* Customer

## 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\_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\_employmenthistory\_contactid | Lookup | Contact |
| msnfp\_employmenthistory\_contactidname | String | N/A |
| msnfp\_employmenthistory\_contactidyominame | String | N/A |
| 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

Delivery Framework represents a management unit of work defined by the organization or entity doing the work. In IATI, the Delivery Framework is an “Activity.” It may be a large program of work, a small project or any other logical grouping of work and resources. Delivery Frameworks can be organized hierarchically and are related to Objectives.

This entity can be linked with the following entities:

* Parent Delivery Framework
* Objective
* Account

## 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\_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 standard industry frameworks.

This entity can be linked with the following entities:

* Result

## 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\_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.

This entity can be linked with the following entities:

* Indicator
* Parent Indicator Value

## 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\_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

An 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.

Objectives may be used to report on goals or strategies outside of or across delivery framework (i.e. Program) boundaries.  For example, "Advocacy" may be an objective of both "Health Care" and "Education" programs.

This entity can be linked with the following entities:

* Parent Objective
* Account

## 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\_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

OFAC Match is a placeholder entity for tracking Office of Foreign Assets Control (OFAC) Specially Designated Naturals (SDN) searches and results.

This entity can be linked with the following entities:

* Account

## 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\_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

Payment Asset represents the assets associated with specific types of payments including, but not limited to, in-kind gifts, stocks and securities. The Payment Asset entity enables an organization to ensure compliance with specific reporting guidelines.

This entity can be linked with the following entities:

* Planned Giving
* Payment Schedule
* Transaction

## 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 |
| 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

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

This entity can be linked with the following entities:

* Account

## 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\_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.

This entity can be linked with the following entities:

* Payment Method

## 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\_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.

This entity can be linked with the following entities:

* Donor Commitment
* Account

## 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 |
| 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 gift made during a donor's lifetime or at the time of their death that involves their estate and/or tax planning.  There are many forms of planned giving, but the three most common vehicles are CRTs (Charitable Remainder Trusts), Bequests and Annuities, each of which has different tax benefits and financial reconciliation guidelines for the nonprofit organization.

This entity can be linked with the following entities:

* Account
* Contact
* Campaign
* Donor Commitment

## 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 |
| 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

Preference represents 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 include, but are not limited to,  personal interests, additional communication preferences like desire to receive a newsletter, specific outreach the constituent wishes to or not to receive and additional affiliation information like Constituent Type (i.e. Donor, Volunteer, Board Member) associations and ratings. Preferences also typically store demographic information in a series of dependent picklists: Category, Subcategory, Type, Subtype.

Preferences are a key feature for enabling one-to-one engagement as they enable an organization to track the specific characteristics of its constituents across the system and leverage that data for marketing and outreach engagement across channels.

This entity can be linked with the following entities:

* Account
* Contact
* Customer
* Opportunity

## 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\_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

A recommendation is the mechanism through which awarding entities (ie, Foundations) either 1) provide recommendations to an award applicant in the form of additional requested information, clarification of previously submitted information, and any other information the awarding entity may wish to collect to process a Request to completion, and/or 2) conduct and record evaluations of a Request by internal staff and or external staff/consultants with may or may not be visible to the award applicant.

This entity can be linked with the following entities:

* Lead
* Request
* Account
* Contact
* Customer

## 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\_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

Reports represent information submitted by an awardee to the awarding entity (i.e., a Foundation) or information submitted by an authorized awarding entity individual/entity about an awardee. For example, Reports can be utilized to track historical evaluations of impact, site visits and interviews. 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.

This entity can be linked with the following entities:

* Request
* Award
* Contact
* Lead

## 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\_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

Requests represent 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. Requests aggregate information about the request itself, the requestor or requesting organization, reviews and the award(s) that result from a request.

This entity can be linked with the following entities:

* Docket
* Lead
* Account
* Contact
* Customer

## 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 |
| 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.

This entity can be linked with the following entities:

* Delivery Framework

## 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\_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 assessment of a Request made by an internal staff member (or team) or an external third party individual or entity (i.e. Consultant) and all of the relevant information that needs to be tracked at the "review" stage of an application.

This entity can be linked with the following entities:

* Lead
* Request

## 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\_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

A Salutation represents the way a constituent wishes to be addressed, depending on the source, purpose and content of a of communication. Salutations may or may not be auto-created by workflow.

This entity can be linked with the following entities:

* Account
* Contact
* Customer

## 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\_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 a constituent (i.e. donor, contact, account or organization) to the nonprofit.  Transaction records must track key information about the gift or items transferred from a constituent to a nonprofit organization.  Critical transaction information to capture and provide audit capabilities include, but are not limited to, what payment method was used, what channel the gift came from, the amount, frequency, whether an adjustment was made (and on what date for what amount?), when was the transaction received vs. processed vs. reconciled and more.

This entity can be linked with the following entities:

* Campaign
* Linked Transaction (for adjustments)
* Payment Schedule
* Payment Method
* Account

## 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 |
| 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

An opportunity represents 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.

This entity can be linked with the following entities:

* Account
* Campaign
* Contact

## Attributes

| **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 |