

Dynamics CRM Glossary

Contacts	This Entity holds all the student contacts. A student can have only one contact. To make sure every student has a single contact record, we use dedupe logic. Which means a contact will not be created - if USFID or USFEmail matches with existing contact record. -If Combination of First-name and Last-name and (Primary Email or Primary Phone Number or DOB) matches with existing contact record. Right now we have just student contacts.. in future we are gonna add contacts of Guiding council-er, advisers and parents etc
Opportunities	Opportunity entity hold the student applications of applicants and beyond. For Prospects and Suspects opportunities holds the information of their predicted entry to the university. A contact can have multiple opportunities. Currently we are bringing only undergraduate and suspects and prospects.
Source	Source entity has the the information about the history of any entry. examples of sources are Banner, Hobsons, etc. A student can be a suspect or prospect based on the source information which is filtered by the most recent source information.
High School History	This entity holds high school history of a student. A contact can have multiple High school histories.
Accounts	Every high school information is saved in account entity. A high school will have an account.
Events	Events are conducted by University to interact with students. Students register for an event by using Event Registration form and all these students are recorded in dynamics as Prospects.
Email Queues	The list of inbound emails or a thread of emails where a USF representative needs to respond to the inquiry or still answering the queries by exchange of email threads.
Checklist Items	Checklist items has the list of documents that are to be submitted by the students as a part of recruitment process.
Test Scores	Different types of students test scores like SAT, ACT etc are saved into Test Scores. This is related to opportunity and High School History.
Territories	All the instate, out of state and international regions are divided into territories. All the in-state regions are divided into territories based on the range on Zip Codes and counties. All the OutOfState regions are divided into territories based on states. Each state is considered as a territory. Finally, all the international regions are divided into territories based on countries. Each territory has recruiter as the owner and a territory can have multiple recruiters.
Term	An opportunity has entry term information, where a student mentions the term he is submitting the application for. Example Fall 2020, Spring 2020 etc.
Activities	Activities has all the information about the student interactions via a phone call or an Email etc.
Kiosk Form	Kiosk form is used for students to sign in when they come to visit the admissions front desk at Tampa campus. The reasons for visit are different for UG and graduate students. https://usfweb.usf.edu/admissions/domestic/domestic-kiosk/kiosk.aspx
Suspects	Suspect is contact purchased from the College Board (administers of the SAT) or Educational Opportunity Service (administers the ACT). Suspects may include high school freshmen, sophomores, juniors and seniors. CTA = Visit USF.
Prospects	Prospect is a contact who has engaged with USF, to include requesting information, registering for a campus tour or recruitment event, attending a pre-college program, or similar. Prospects are generally rising high school seniors. CTA = Apply to USF.

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