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How Fields Sync

Data between a FIMS CRM field and its equivalent in FIMS itself can be synced one of two different ways.

- **FIMS-to-CRM Sync** – For these fields, syncing takes data from the FIMS field and uses it to update its equivalent field in CRM. Changes made in the field in CRM do not come back to FIMS. These are mostly read-only fields, like the date a record was last updated or fund balance information.
- **Two-way Sync** – Changes made in one system will be used to update the field in the other. If both have been edited since the last sync, the most recent update will take precedence during the sync.

Each field syncs using only one of the above methods. The tables below lists the method for each pair.

IMPORTANT: Data syncing issues which result from a client removing one of these synced fields will not be covered by standard FIMS Technical Support. Resolving issues directly resulting from removing synced fields may be provided by MicroEdge as a paid service.

Individual and Organization Profile Records

Profile Record Information

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Prefix	Prefix	Prefix	Prefix__c	Two –way	
		Profile Record Name			Unique to FIMS CRM
		Parent Profile Record			Org – Unique to FIMS CRM
		Type	Type		Org
M.I.	Minit	Middle Initial	Middle_Initial__c	Two –way	
Suffix	Suffix	Suffix	Suffix__c	Two –way	
Title Code		Title Code	Title__c	Two-way	Link to Title Code Detail
		Full Individual Name	Full_Individual_Name__c		Unique to FIMS CRM
Sort Name		Alpha Sort Field	Alpha_Sort_Field__c	Two-way	
Report Name		Report Name	Report_Name__c	Two-way	
		Profile Affiliations Changed	Profile_Affiliations_Changed__c		
Active/Inactive		Active	Active__c	Two-way	



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Organization		Organization Name	Organization_Name__c	Two-way	
Individual/Organization		Profile Record – Record Type		FIMS to CRM	Indicates Individual or Organization
		Profile Record Owner			Unique to FIMS CRM
		Profile Gender	Profile_Gender__c		Unique to FIMS CRM
Nickname	NickName	Nickname	Nickname__c	Two –way	
		Professional Advisor	Professional_Advisor__c		Unique to FIMS CRM

Title Code Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Title Description			eg. Executive Director
Title Code	Bus-Title	Title Code	Title_Code__c	Two-way	eg. ED

Profile Extensions

Profile extensions indicate whether a particular Profile record is also a Donor, Grantee, Vendor, and/or Student.

When the Profile is created in FIMS CRM, these extensions may be added and removed within FIMS CRM. Once the record is in FIMS (or if it originates from FIMS), the extensions may only be changed / removed from FIMS and those changes will push to FIMS CRM during the next sync.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Vendor	Vendor	Profile is Vendor	Profile_is_vendor__c	Two-way	Only two-way if adding new Profile in FIMS CRM
Grantee	Grantee	Profile is Grantee	Profile_is_grantee__c	Two-way	Only two-way if adding new Profile in FIMS CRM
Donor	Donor	Profile is Donor	Profile_is_donor__c	Two-way	Only two-way if adding new Profile in FIMS CRM
Student	Student	Profile is Student	Profile_is_student__c	Two-way	Only two-way if adding new Profile in FIMS CRM



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Primary Contact Name Information

Organization Only.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Prefix		Prefix	Prefix__c	Two-way	
First		First Name	First_Name__c	Two-way	
M.I.		Middle Initial	Middle_Initial__c	Two-way	
Last		Last Name	Last_Name__c	Two-way	
Suffix		Suffix	Suffix__c	Two-way	
E-Mail		Contact Email	Contact_Email__c	Two-way	
		Full Org Contact Name	Full_Org_Contact_Name__c		
Nickname		Nickname	Nickname__c	Two-way	
Title Code		Title Code	Title__c	Two-way	Links to Title Code Detail (see page 4)

Primary/Contact Information

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Address Type	Address-Type	Type-Primary Address	Type_Primary_Address__c	Two-way	Links to Address Type Detail
Address2	Address 2	Address 2	Address_2__c	Two-way	
City	City	City	City__c	Two-way	
State	State	State	State__c	Two-way	
ZIP	ZIP	ZIP	ZIP__c	Two-way	
County	CountyCode	County Name	County_Name__c	Two-way	
Country	Country	Country	Country__c	Two-way	
Email	Email	Email	Email__c	Two-way	
Home Phone	HomePhone	Home Phone	Home_Phone__c	Two-way	Individual Only
Ext	Workext	Work Ext.	Work_Ext__c	Two-way	
Cellular		Mobile Phone	MobilePhone	Two-way	Individual Only
Cellular		Organization Mobile Phone	Organization_Mobile_Phone__c	Two-way	Org
Fax	Fax	Fax	Fax	Two-way	



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Web Site	Web-site	Website	Website	Two-way	

Address Type Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Address Type Description			eg. Business Address
Type	Address-Type	Address Type Code	Address_Type__c	Two-way	eg. Bus1

Address Information(Read Only)

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Org Main Address			Org Only. Combines: -Org Main Street -Org Main City -Org Main State -Org Main Zip -Org Main Country
		Primary Address			Individual Only. Combines: -Primary Street -Primary City -Primary State/Pro -Primary Zip -Primary Country



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Current Mailing Address			Individual Only. Combines: -Current Mailing Street -Current Mailing City -Current Mailing State/Province -Current Mailing Zip -Current Mailing Country
		Type – Current Mailing Address	Type_Current_Mailing_Address__c		Individual Only. Home, Work, etc.

Household Information

Individual Only.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Household Association	Household_Association__c		Unique to FIMS CRM
		Relationship to Head of Household	Relationship_to_HOH__c		Unique to FIMS CRM
		Send Mail to Household	Send_Mail_to_Household__c		Unique to FIMS CRM
		Household Street	Household_Street__c		Unique to FIMS CRM
		Household City	Household_City__c		Unique to FIMS CRM
		Household State	Household_State__c		Unique to FIMS CRM
		Household ZIP/Postal Code	Household_ZIP_Postal_Code__c		Unique to FIMS CRM



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Spouse Information

Individual Only.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Spouse Prefix	Sp-prefix	Spouse Prefix	Spouse_Prefix__c	Two -way	
Spouse First	Sp-fname	Spouse First Name	Spouse_First_Name__c	Two -way	
Spouse M.I.	Sp-minit	Spouse M.I.	Spouse_M_I__c	Two -way	
Spouse Last	Sp-lname	Spouse Last Name	Spouse_Last_Name__c	Two -way	
Spouse Suffix	Sp-suffix	Spouse Suffix	Spouse_Suffix__c	Two -way	
		Full Spouse Name	Full_Spouse_Name__c		Unique to FIMS CRM
		Spouse Gender	Spouse_Gender__c		Unique to FIMS CRM
Spouse NickName	Sp-nickname	Spouse Nickname	Spouse_Nickname__c	Two -way	
Spouse Email	Sp-email	Spouse Email	Spouse_email__c	Two -way	
Spouse Cellular	Sp-cellphone	Spouse Mobile	Spouse_Mobile__c	Two -way	
Spouse Work Phone	Sp-workphone	Spouse Work Phone	Spouse_Work_Phone__c	Two -way	

Gifts-At-A-Glance

There are similar fields in FIMS but they do not sync to FIMS CRM. These statistics are calculated in FIMS CRM.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Total Gift Amount	Total_Gift_Amount__c		
		First Gift Date	First_Gift_Date__c		
		Last Gift Date	Last_Gift_Date__c		
		Largest Gift Date	Largest_Gift_Date__c		
		Smallest Gift	Smallest_Gift__c		
		First Gift Amount	First_Gift_Amount__c		
		Last Gift Amount	Last_Gift_Amount__c		
		Largest Gift Amount	Largest_Gift__c		



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Grants-At-A-Glance

There are similar fields in FIMS but they do not sync to FIMS CRM. These statistics are calculated in FIMS CRM.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Total Grant Amount	Total_Grants__c		
		First Grant Date	First_Grant_Date__c		
		Last Grant Date	Last_Grant_Date__c		
		Largest Grant Date	Largest_Grant_Date__c		
		First Grant Amount	First_Grant_Amount__c		
		Last Grant Amount	Last_Grant_Amount__c		
		Largest Grant Amount	Largest_Grant_Amount__c		

Salutations & Mailing Labels

Note: Field Labels in FIMS can be customized, but these are the standard default FIMS labels.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Default Salutation		Default Salutation	Default_Salutation__c	Two-way	
Joint or Alternate Name		Mailing Label Name	Mailing_Label_Name__c	Two-way	
Formal/Ind		Formal Individual	FI__c	Two-way	
Informal/Ind		Informal Individual	II__c	Two-way	
Formal w/Spouse		Formal Spouse	FS__c	Two-way	
Informal w/Spouse		Informal Spouse	IS__c	Two-way	
President		President	President__c	Two-way	

Donor Information

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Solicitor	solcode	Solicitor	Solicitor__c	Two-way	
Donor Class	donclass	Donor Class	donor_class__c	Two-way	
Occupation	occcode	Occupation	occupation__c	Two-way	
Ethnic Code	ethnic-code	Ethnicity	ethnicity__c	Two-way	



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Source	soucode	Source	Source__c	Two-way	
Donor Rank	rank	Donor Rank	donor_rank__c	Two-way	
Comment	Don-comment	Donor Information Comments	donor_information_comments__c	Two-way	
Anonymous	anonymous	Anonymous	anonymous__c	Two-way	
Staff Code	staffcode	Staff Code	Staff_code__c	Two-way	
Birth Date	Birthdate	Birth Date	birth_date__c	Two-way	
Deceased	datedeceased	Deceased Date	deceased_date__c	Two-way	
Birth Date (Spouse)	spouse-Birthdate	Spouse Birth Date	spouse_birth_date__c	Two-way	
Deceased (Spouse)	Spouse-Datedeceased	Spouse Deceased Date	spouse_deceased_Date__c	Two-way	

Preferences

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Allow Mail	AllowMail	Allow Mail	Allow_Mail__c	Two-way	
Solicit	Solicit	Solicit	Solicit__c	Two-way	
		Email Opt Out	HasOptedOutOfEmail		Unique to FIMS CRM
		Do Not Call	DoNotCall		Unique to FIMS CRM

Profile Affiliations

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
(Affiliations Tab-left side)		Available Affiliations		Two-way	Tree list view
(Affiliations Tab-right side)		Profile Affiliations		Two-way	Tree list view



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FIMS Information

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		FIMS Status	FIMS_Status__c		
		Profile To Be Added to FIMS	Add_to_FIMS_Flag__c	CRM to FIMS	Flag that will be used to add Profile to FIMS if there isn't a FIMS ID already for the record.
		Closed/Won Opps for Profile	Closed_Won_Opps_for_Profile__c		
*not displayed	Record_ID (key ID)	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
Profile Added	DateAdded	FIMS Create Date	FIMS_Create_Date__c	FIMS to CRM	
Changed	DateChg	FIMS Last Modified	FIMS_Last_Modified__c	FIMS to CRM	

System Information

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Created By	CreatedBy		
		Last Modified By	LastModifiedBy		

Opportunities

Opportunities do not sync to FIMS except for the Promise Opportunity type which does sync back and forth with the FIMS Promise record. Sync Types below only refer to this type of Opportunity.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Opportunity Name	Name		
		Event	Event__c		
		Amount	Amount		
		Stage	StageName		
		Opportunity Record Type	RecordType		



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Opportunity Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Opportunity Name	Name		
		Profile Record Name			
		Stage	StageName		
Solicitor		Solicitor	Solicitor__c	Two-way	
Source		Source	Source__c	Two-way	
Fund ID		Fund	Fund__c	Two-way	
Purpose		Purpose	Purpose__c	Two-way	
Gift Type		Gift Type	Gift_Type__c	Two-way	
Acknowledgement		Acknowledgement	Acknowledgement__c	Two-way	
Promise ID		Promise ID	Promise_ID__c	FIMS to CRM	
		Age (Custom)	Age_Custom__c		
		Opportunity Owner	Owner		
Amount		Amount	Amount	Two-way	
Maturity Value		Maturity Value	Maturity_Value__c	Two-way	
		Close Date	CloseDate		
Promise Date		Promise Date	Promise_Date__c	Two-way	
Maturity Date		Maturity Date	Maturity_Date__c	Two-way	
		Probability (%)	Probability		
Comments		Comments	Comments__c	Two-way	



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Alternate Addresses

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			Links to Alternate Address Detail
Type	Address-Type	Address Type	Address_Type__c	Two-way	
City	City	City	City__c	Two-way	
State	State	State/Province	State_Province__c	Two-way	
Email	Email	Email	Email__c	Two-way	
Begins	Alt-Begin	Begin	Begin__c	Two-way	
Ends	Alt-Ends	End	End__c	Two-way	
		Last Modified			

Alternate Address Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
*not displayed	IDCode	Profile	Account_ID	Two-way	Links the Alternate Address record to the Profile record.
Type	Address-Type	Address Type	Address_Type__c	Two-way	
Begins	Alt-Begin	Begin	Begin__c	Two-way	
Ends	Alt-Ends	End	End__c	Two-way	
Recurs	Recurring	Recurring	Recurring__c	Two-way	
Allow Mail	AllowMail	Allow Mail	Allow_Mail__c	Two-way	
Address1	Address1	Address Line 1	Address_Line_1__c	Two-way	
Address2	Address2	Address Line 2	Address_Line_2__c	Two-way	
City	City	City	City__c	Two-way	
State	State	State/Province	State_Province__c	Two-way	
ZIP	ZIP	ZIP/Postal Code	ZIP_Postal_Code__c	Two-way	
County	CountyCode	County	County__c	Two-way	
Country	Country	Country	Country__c	Two-way	
Email	Email	Email	Email__c	Two-way	



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Home Phone	HomePhone	Home Phone	Home_Phone__c	Two-way	
Work Phone	WorkPhone	Work Phone	Work_Phone__c	Two-way	
Ext	WorkExt	Work Ext	Work_ext__c	Two-way	
Fax	Fax	Fax	Fax__c	Two-way	
*not displayed	Address_ID (key ID)	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
Address Added	DateAdded	FIMS Create Date	FIMS_Create_Date__c	FIMS to CRM	
Changed	DateChg	FIMS Last Modified	FIMS_Last_Modified__c	FIMS to CRM	
		Is Profile in FIMS?			

Relationships

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Grantee Contact	GranteeContact	Grantee Contact Relationship?	Grantee_Contact__c	Two-way	
Relator	Relator-id	Relator	Profile__c	Two-way	
Relatee	Relate-id	Relatee	Related_Profile__c	Two-way	
Relationship	Association	Relationship to Relatee	Relationship_Type_lu__c	Two-way	
Inverse Relationship type	Inverse-Assoc	Inverse Relationship Type	Inverse_Relationship_Type_LU__c	Two-way	
Prefix	Prefix	Prefix	Prefix__c	Two-way	
First	Fname	GC First Name	First_Name__c	Two-way	
MI	MInitial	Middle Initial	Middle_initial__c	Two-way	
Last Name	Lname	GC Last Name	Last_Name	Two-way	
Suffix	Suffix	Suffix	Suffix__c	Two-way	
Comments	Comment	Comments	Comments__c	Two-way	
Bus Title	Bus-Title	Title Code	Title_Code__c	Two-way	
Phone	Granteephone	Phone	Phone__c	Two-way	
Ext	Granteeext	Ext	Ext__c	Two-way	
Email	Email	Email	Email__c	Two-way	



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Salutation	Salutation	Salutation	Salutation__c	Two-way	
Group Code	GroupCode	Group Code	Group_Code_new__c	Two-way	
Primary Contact	PrimaryContact	Primary Contact	Primary_Contact__c	Two-way	
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
Date Added	Date-Added	FIMS Create Date	FIMS_Create_Date__c	FIMS to CRM	
Date Changed	Date-Changed	FIMS Last Modified	FIMS_Last_Modified__c	FIMS to CRM	

Grantee History

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			Links to Grant Detail
Grant Num		Grant ID		FIMS to CRM	
Grant Date		Grant Date		FIMS to CRM	
Grant Amount		Grant Amount		FIMS to CRM	

Grant Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			Links to Grant Detail
Grant Num		Grant ID		FIMS to CRM	
(Name from Id Code)		Grantee Profile Name		FIMS to CRM	
(Name from Id Code)		Student Profile Name		FIMS to CRM	
Status		Status Code		FIMS to CRM	
Action		Action Code		FIMS to CRM	
*not displayed		Scholarship		FIMS to CRM	
Grant Date		Grant Date		FIMS to CRM	
Grant Amount		Grant Amount		FIMS to CRM	
Interfund (yes/no)		Inter-Fund Grant		FIMS to CRM	
Anonymous (yes/no)		Anonymous Grant		FIMS to CRM	



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Fund-Grant Association

Fund-level detail from the Payment Plan tab of the Grant Application in FIMS.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Fund-Grant Association Name			
		Associated Fund		FIMS to CRM	
		Associated Grant		FIMS to CRM	
Amount		Amount Applied to Fund		FIMS to CRM	
Payment Date		Date		FIMS to CRM	
Line		Line No.		FIMS to CRM	
		FIMS ID		FIMS to CRM	
		Grantee Profile Name		FIMS to CRM	

Grantee Summary

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record ID			
Year		Year		FIMS to CRM	
Applications		Total Applications		FIMS to CRM	
Denied		Total Denied		FIMS to CRM	
Largest		Largest Grant Amount		FIMS to CRM	
Total Grants		Total Grants		FIMS to CRM	
Grants Paid		Grants Paid		FIMS to CRM	
Grants		Total Approved		FIMS to CRM	

Grantee Summary Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record ID			
Year		Year		FIMS to CRM	
Applications		Total Applications		FIMS to CRM	
Denied		Total Denied		FIMS to CRM	
Grants		Total Approved		FIMS to CRM	
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
(Name of Id Code)		Grantee Profile Name		FIMS to CRM	
Total Grants		Total Grants		FIMS to CRM	
Grants Paid		Grants Paid		FIMS to CRM	
Largest		Largest Grant Amount		FIMS to CRM	

Scholarships

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
Grant Amount		Grant Amount		FIMS to CRM	
Grant Num		Grant ID		FIMS to CRM	

Grant Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
Grant Num		Grant ID		FIMS to CRM	
(Name from Id Code)		Grantee Profile Name		FIMS to CRM	
(Name from Id Code)		Student Profile Name		FIMS to CRM	
Status		Status Code		FIMS to CRM	
Action		Action Code		FIMS to CRM	
*not displayed		Scholarship		FIMS to CRM	
Grant Date		Grant Date		FIMS to CRM	
Grant Amount		Grant Amount		FIMS to CRM	
Interfund (yes/no)		Inter-Fund Grant		FIMS to CRM	



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Anonymous (yes/no)		Anonymous Grant		FIMS to CRM	

Gift History

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
Amount	GiftAmt	Total Amount	Total_amount__c	FIMS to CRM	
Gift Date		Date		FIMS to CRM	
Pledge No.	Pledgnum	Pledge No.	Pledge_No__c	FIMS to CRM	
Gift No.	GiftNum	Gift No.	Gift_No__c	FIMS to CRM	

Gift History Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Profile			
		Record No.			
Gift No.	GiftNum	Gift No.	Gift_No__c	FIMS to CRM	
Pledge No.	Pledgnum	Pledge No.	Pledge_No__c	FIMS to CRM	
Amount	GiftAmt	Total Amount	Total_amount__c	FIMS to CRM	
Adjustment Type		Adjustment Type		FIMS to CRM	
Gift Date		Date		FIMS to CRM	
Source	Soucode	Source	Source__c	FIMS to CRM	
Type	Gifttypecode	Gift Type	Gift_type__c	FIMS to CRM	
Purpose	Purcode	Purpose	Purpose__c	FIMS to CRM	
Solicitor	Solcode	Solicitor	Solicitor__c	FIMS to CRM	



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Fund-Gift Association

Fund-level detail from the Distributions area of the Gift in FIMS.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
Fund ID		Associated Fund		FIMS to CRM	Fund ID shows as Fund Name
		Associated Gift		FIMS to CRM	
Amount		Amount Applied to Fund		FIMS to CRM	
Fund ID		Fund ID		FIMS to CRM	
		FIMS ID		FIMS to CRM	
		Line No.		FIMS to CRM	
		Donor Name		FIMS to CRM	

Gift Summary

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
Year	Gift-year	Year	Year__c	FIMS to CRM	
Total Gifts	Total-gifts	Total Gifts	Total_gifts__c	FIMS to CRM	
Largest	Largest-gift	Largest Gift	Largest_gift__c	FIMS to CRM	
Total Pledges	Total-pledges	Total Pledges	Total_pledges__c	FIMS to CRM	
		Last Modified Date			

Gift Summary Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Profile			
		Record No.			
Year	Gift-year	Year	Year__c	FIMS to CRM	
Gifts	Num-of-gifts	# of Gifts	Of_gifts__c	FIMS to CRM	
Largest	Largest-gift	Largest Gift	Largest_gift__c	FIMS to CRM	
Total Gifts	Total-gifts	Total Gifts	Total_gifts__c	FIMS to CRM	



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Pledges	Num-of-pledges	# of pledges	Of_pledges__c	FIMS to CRM	
Largest	Largest-pledge	Largest Pledge	Largest_pledge__c	FIMS to CRM	
Total Pledges	Total-pledges	Total Pledges	Total_pledges__c	FIMS to CRM	
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	

Fund Associations

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	RecordNum	Record No.	FIMS_ID__c (external ID)	FIMS to CRM	
Fund ID	FundID	Fund ID	Fund_ID__c	FIMS to CRM	
		Fund	Fund__c		See Fund Detail
Rep Type	Rep-Type	Rep Type	Rep_type__c	FIMS to CRM	
		Last Modified Date			

Fund Association Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Profile			
		Record No.			
Fund Name		Fund	Fund__c		
Fund ID	FundID	Fund ID	Fund_ID__c	FIMS to CRM	
Description	field rep-descr	Description	Description__c	FIMS to CRM	
Rep Type	Rep-Type	Rep Type	Rep_type__c	FIMS to CRM	
Suggest Grants	Suggest-Grants	Suggest Grants	Suggest_Grants__c	FIMS to CRM	
Donor Central	Donor-Central	Donor Central	Donor_Central__c	FIMS to CRM	



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Fund Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Fund Name	acctdescr	Fund Name	Name	FIMS to CRM	
Fund ID	FundID	Fund ID	Fund_ID__c	FIMS to CRM	
Total Fund Balance		Total Fund Balance		FIMS to CRM	
Available to Spend		Available to Spend		FIMS to CRM	
Fund Retired		Date Retired		FIMS to CRM	
		Owner			
Division		Division		FIMS to CRM	
Fund Class		Class		FIMS to CRM	
Fund Type		Type		FIMS to CRM	
Sub-Type		Sub Type		FIMS to CRM	
Staff		Staff Code		FIMS to CRM	

Asset Strategy Fields

FIMS Fund Association Record		FIMS CRM Fund Association Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Account	r-Acct-key	Account Key	FIMS_ID__C	FIMS to CRM	
Fund	r-fund	Fund ID	fund__c	FIMS to CRM	
Account Description	r-acctdescr	Account Description	account_description__c	FIMS to CRM	
Strategy	r-asset-code	Strategy Code	strategy__c	FIMS to CRM	
Fixed \$	r-fixed-amt	Fixed Percent	fixed__c	FIMS to CRM	
Current %	r-current-bal	Current Balance	current__c	FIMS to CRM	
Target %	r-amt	Target Percent	target__c	FIMS to CRM	
GL Balance	r-tot	Account Balance	account_balance__c	FIMS to CRM	

Fund Balance Fields

FIMS Fund Association Record		FIMS CRM Fund Association Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Fund ID	Fundid	Fund ID	fund__c	FIMS to CRM	
Fund Name	acctdescr	Fund Name	Name	FIMS to CRM	



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FIMS Fund Association Record		FIMS CRM Fund Association Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Beginning Balance	begin-bal	Beginning Balance	beginning_balance__c	FIMS to CRM	
Ending Balance	Balance	Ending Balance	ending_balance__c	FIMS to CRM	

Pledge History

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
		Fund			See Fund Details
Amount		Amount		FIMS to CRM	
Frequency		Frequency		FIMS to CRM	
First Payment Date		First Payment Date		FIMS to CRM	
Number of Payments		Number of Payments		FIMS to CRM	
Pledge Date		Pledge Date		FIMS to CRM	
Pledge No.		Pledge No.		FIMS to CRM	

Pledge History Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
Pledge No.		Pledge No.		FIMS to CRM	
(Name of Id Code)		Profile		FIMS to CRM	See Person Profile Record
Amount		Amount		FIMS to CRM	
Fund ID		Fund			Fund ID shows as Fund Name
Pledge Date		Pledge Date		FIMS to CRM	
First Payment Date		First Payment Date		FIMS to CRM	
Number of Payments		Number of Payments		FIMS to CRM	
Frequency		Frequency		FIMS to CRM	
Type		Gift Type		FIMS to CRM	
Solicitor		Solicitor		FIMS to CRM	
Source		Source		FIMS to CRM	
Purpose		Purpose		FIMS to CRM	



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Pledge Installments

Line item detail from the Installments tab of the Pledge in FIMS.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Record No.			
Installment No.		Installment No.		FIMS to CRM	
Amount		Installment Amount		FIMS to CRM	
Outstanding		Outstanding		FIMS to CRM	
Date Due		Date Due		FIMS to CRM	
Fund ID		Fund		FIMS to CRM	Fund ID shows as Fund Name
Pledge No.		Pledge		FIMS to CRM	
		Profile		FIMS to CRM	
		FIMS ID			

Open Activities

Open Activities do not Sync to FIMS (only Closed Activities).

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Subject			See Task Detail
		Name			See Person Profile Record
ID Code	IDCode	Related To	WhatID		
		Task			Unique to FIMS CRM
		Due Date			
		Status			Unique to FIMS CRM
		Priority			
		Assigned To			Links to Chatter page.



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Activity History

Closed Contacts in FIMS sync to Activity History in FIMS CRM and vice versa.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Subject			See Task Detail
Contact Type		Activity Type		Two-way	
		Name			
ID Code	IDCode	Related To	WhatID	Two-way	
		Task			
Contact Date		Due Date		Two-way	
		Assigned To			Links to Chatter page
		Last Modified Date/Time			

Task Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Assigned To			
		Subject			
Contact Date		Due Date		Two-way	
		Phone			
Priority		Priority		Two-way	
		FIMS ID			
Staff		Staff Code		Two-way	
Contact Type		Activity Type		Two-way	
		Activity Type Description			
		FIMS Profile ID			
		Status			
		Name			
		Related To			
		Email			
Comment		Comments		Two-way	
		Tip:			
		Reminder			



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Notes & Attachments

Notes do not sync back and forth with FIMS.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Type			
		Title			See Note Detail
		Related To	WhatID		
		Last Modified			
		Created By			Links to Chatter page.

Note Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Note Owner			
		Related To	WhatID		
		Private			
		Title			
		Body			

Campaign History

Campaigns and Events do not sync to FIMS.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Campaign Name	Name		
		Start Date	StartDate		
		Type	Type		
		Status	Status		
		Responded			
		Member Status Updated			



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Campaign/Event Detail

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Campaign Name	Name		
		Type	Type		
		Event Start Date	Event_Start_Date__c		
		Event End Date	Event_End_Date__c		
		Campaign Owner	Owner		
		Active	IsActive		
		Status	Status		
		Event Code	Event_Code__c		
		Maximum # of Attendees	Maximum_of_Attendees__c		
		Number of Tables	Number_of_Tables__c		
		Seats Per Table	Seats_Per_Table__c		
		Description	Description		
		Budgeted Cost	BudgetedCost		
		Expected Revenue	ExpectedRevenue		
		Net Revenue Goal	Net_Revenue_Goal__c		
		Total Vendor Expenses	Total_Vendor_Expenses__c		
		Additional Expenses	Additional_Expenses__c		
		Total Actual Expenses	Total_Actual_Expenses__c		
		Total Value Won Opportunities	AmountWonOpportunities		
		Event Net Revenue	Event_Net_Revenue__c		
		Total Contacts	NumberOfContacts		
		Total Responses	NumberOfResponses		
		Total Attendee Count	Total_Attendee_Count__c		
		Open Attendee Spaces	Open_Attendee_Spaces__c		
		Num Won Opportunities	NumberOfWonOpportunities		



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FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Num Total Opportunities	NumberOfOpportunities		

Person / Profile Record History

Tracks the changes made to the profile record.

FIMS Record		FIMS CRM Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Date			
		User			Links to Chatter page.
		Action			



Other FIMS Codes

You cannot create Group Codes, Relationship Codes, Address Types, County Codes and Title Codes within FIMS CRM. These codes can only be created and managed within FIMS. Through integration with FIMS CRM, they will display as read-only records and will be available for use throughout MicroEdge FIMS CRM. For example, in the Profile record you can use the Title Code field to search for available codes from the Title Code table in FIMS CRM.

Acknowledgements

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Acknowledgement Description		FIMS to CRM	
Ack. Code		Acknowledgement Code		FIMS to CRM	
		Owner			

Address Type

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Address Description	Addr-Descr	Address Type Description	Name	FIMS to CRM	
Address Type Code	Address-Type	Address Type Code	Address_Type_Code__c	FIMS to CRM	

County

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
County Name	CountyName	County Name	Name	FIMS to CRM	
County Code	CountyCode	County Code	County_Code__c	FIMS to CRM	



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Donor Classes

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Donor Class Description	Donor_Information_Comm ents__c	FIMS to CRM	
Donor Class		Donor Class Code	Donor_Class__c	FIMS to CRM	

Donor Rank

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Donor Rank Description		FIMS to CRM	
Donor Rank		Donor Rank Code	Donor_Rank__c	FIMS to CRM	

Ethnicity

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Ethnicity Description		FIMS to CRM	
Ethnic Code		Ethnicity Code	Ethnicity__c	FIMS to CRM	

Gift Types

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Gift Type Descripton		FIMS to CRM	
Gift Type		Gift Type Code		FIMS to CRM	

Group Codes

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Group Description		FIMS to CRM	
Group Code	GroupCode	Group Code	Group_Code__c	FIMS to CRM	



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Occupations

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Occupation Description		FIMS to CRM	
Occupation		Occupation Code	Occupation__c	FIMS to CRM	

Purposes

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Purpose Description		FIMS to CRM	
Purpose		Purpose Code		FIMS to CRM	

Relationship

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
	AssocDescr	Relationship Type	Name	FIMS to CRM	
Relationship	Association	Relationship Code	Relationship_Code__c	FIMS to CRM	
Group Code	GroupCode	Group Code	Group_Code__c	FIMS to CRM	

Solicitors

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Solicitor Description		FIMS to CRM	
Solicitor		Solicitor Code		FIMS to CRM	

Sources

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
		Source Description		FIMS to CRM	
Source		Source Code	Source__c	FIMS to CRM	



Title

FIMS Type Code		FIMS CRM Type Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Title Description	TitleDescr	Title Description	Name	FIMS to CRM	
Title Code	TitleCode	Title Code	Title__c	FIMS to CRM	

FIMS CRM Records that Do Not Sync with FIMS

Not all records and fields that are available in FIMS CRM sync to FIMS. Fields in the following records are stored only in FIMS CRM and do not sync to FIMS:

- **Leads** – Once a Lead is converted into a Profile, the Profile record can be brought into FIMS, but Lead records reside only in FIMS CRM.
- 1. **Opportunities – Donor Prospect Opportunities and Event Attendance/Support Opportunities** are tracked only in FIMS CRM. The data in these records do not sync with FIMS.
NOTE: Promise Opportunities do sync with FIMS. See the section for **Promises** in this document.
- **Households** – Households are tracked only in FIMS CRM. The data in these records does not sync with FIMS.
- **Campaigns / Events** – Only tracked in FIMS CRM. The data in these records does not sync with FIMS
 - Tables / Teams
 - Volunteer Positions
 - Event Vendors