

FIMS Fields That Sync with CRM

CRM v2.1

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FIMS Fields That Sync with CRM

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Overview

This document lists the FIMS CRM and FIMS fields which sync when you run syncing manually, and each time syncing is run automatically (as a regularly scheduled Windows Task). These FIMS CRM fields are the ones you should use great caution in altering, and should avoid removing altogether.

The Salesforce platform allows you to customize the online customer relationship management experience for your development staff and other users. You can rearrange tab layouts, add custom fields, change how Leads are assigned, and so on.

Just as you can add custom fields, you can remove or change existing fields. However, it is extremely important to understand which fields are linked to FIMS before changing or removing any standard FIMS CRM fields.

If a CRM field which syncs with FIMS is removed, syncing with FIMS will not work correctly.

Even if you merely want to change a field label, keep in mind the data entered may sync to a FIMS field with its own FIMS label. You will want to avoid confusing the user about what exactly s/he is entering.

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.

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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 following methods; the table below lists the method for each pair.

Profile Record Fields (Individual and Organization)

FIMS Profile Record		FIMS CRM Account Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	Record_ID (key ID)	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
Individual	OrgCode	Account Record Type Type: Individual	RecordTypeID =Individual	FIMS to CRM	If OrgCode in FIMS = Organization, when the Profile is added to FIMS CRM it will create an Organization Profile record.
Organization	OrgCode	Account Record Type Type: Organization	RecordTypeID =Organization	FIMS to CRM	If OrgCode in FIMS = Individual, when the Profile is added to FIMS CRM it will create an Individual Profile record.
Active	Active Value: Yes	Active Value: Yes	Active__c Value: Yes	Two –way	
Inactive	Active Value: No	Active Value: No	Active__c Value: No	Two –way	
Address1	Address 1	Address 1	Address_1__c	Two –way	
Address2	Address 2	Address 2	Address_2__c	Two –way	

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FIMS Profile Record		FIMS CRM Account Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Address Type	Address-Type	Type-Primary Address	Type_Primary_Addres_s__c	Two -way	
Allow Mail	AllowMail	Allow Mail	Allow_Mail__c	Two -way	
Title Code	Bus-Title	Title	Title__c	Two -way	
Cellular	Cell-Phone	Mobile	PersonMobilePhone	Two -way	
City	City	City	City__c	Two -way	
Country	Country	Country	Country__c	Two -way	
County	CountyCode	County Name	County_Name__c	Two -way	
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	
Fax	Fax	Fax	Fax	Two -way	
First	FName	First Name	FirstName	Two -way	Individual Profile
First	FName	First Name	First_Name__c	Two -way	Organization Profile
Home Phone	HomePhone	Home Phone	Home_Phone__c	Two -way	
Last	Lname	Last Name	LastName	Two -way	Individual Profile
Last	Lname	Last Name	Last_Name__c	Two -way	Organization Profile
M.I.	Minit	Middle Initial	Middle_Initial__c	Two -way	
Nickname	NickName	Nickname	Nickname__c	Two -way	
Organization	OrgName	Organization Name	Organization_Name__c	Two -way	
Prefix	Prefix	Prefix	Prefix__c	Two -way	
Solicit	Solicit	Solicit	Solicit__c	Two -way	
Spouse Cellular	Sp-cellphone	Spouse Mobile	Spouse_Mobile__c	Two -way	
Spouse Email	Sp-email	Spouse Email	Spouse_email__c	Two -way	
Spouse First	Sp-fname	Spouse First Name	Spouse_First_Name__c	Two -way	

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FIMS Profile Record		FIMS CRM Account Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Spouse Last	Sp-lname	Spouse Last Name	Spouse_Last_Name__c	Two –way	
Spouse M.I.	Sp-minit	Spouse M.I.	Spouse_M_I__c	Two –way	
Spouse NickName	Sp-nickname	Spouse Nickname	Spouse_Nickname__c	Two –way	
Spouse Prefix	Sp-prefix	Spouse Prefix	Spouse_Prefix__c	Two –way	
Spouse Suffix	Sp-suffix	Spouse Suffix	Spouse_Suffix__c	Two –way	
Spouse Work Phone	Sp-workphone	Spouse Work Phone	Spouse_Work_Phone__c	Two –way	
State	State	State	State__c	Two –way	
Suffix	Suffix	Suffix	Suffix__c	Two –way	
Web Site	Web-site	Website	Website	Two –way	
Ext	Workext	Work Ext.	Work_Ext__c	Two –way	
Work Phone	WorkPhone	Work Phone	Phone	Two –way	
ZIP	ZIP	ZIP	ZIP__c	Two –way	
*not displayed	External-ID (external ID)	*not displayed	Account_ID	CRM to FIMS	
		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.

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Alternate Address Record Fields

FIMS Alternate Address Record		FIMS CRM Alternate Address Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	Address_ID (key ID)	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
Type	Address-Type	Address Type	Address_Type__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	
Allow Mail	AllowMail	Allow Mail	Allow_Mail__c	Two-way	
Begins	Alt-Begin	Begin	Begin__c	Two-way	
Ends	Alt-Ends	End	End__c	Two-way	
City	City	City	City__c	Two-way	
Country	Country	Country	Country__c	Two-way	
County	CountyCode	County	County__c	Two-way	
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	
Email	Email	Email	Email__c	Two-way	
Fax	Fax	Fax	Fax__c	Two-way	
Home Phone	HomePhone	Home Phone	Home_Phone__c	Two-way	
*not displayed	IDCode	Profile	Account_ID	Two-way	Links the Alternate Address record to the Profile record.
Recurs	Recurring	Recurring	Recurring__c	Two-way	
State	State	State/Province	State_Province__c	Two-way	
Ext	WorkExt	Work Ext	Work_ext__c	Two-way	
Work Phone	WorkPhone	Work Phone	Work_Phone__c	Two-way	
ZIP	ZIP	ZIP/Postal Code	ZIP_Postal_Code__c	Two-way	

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Relationship Record Fields

FIMS Relationship Record		FIMS CRM Relationship Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
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	
Comments	Comment	Comments	Comments__c	Two-way	
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	
Group Code	GroupCode	Group Code	Group_Code_new__c	Two-way	
Inverse Relationship type	Inverse-Assoc	Inverse Relationship Type	Inverse_Relationship_Type_LU__c	Two-way	
Bus Title	Bus-Title	Title Code	Title_Code__c	Two-way	
Email	Email	Email	Email__c	Two-way	
First	Fname	GC First Name	First_Name__c	Two-way	
Grantee Contact	GranteeContact	Grantee Contact Relationship?	Grantee_Contact__c	Two-way	
Ext	Granteeext	Ext	Ext__c	Two-way	
Phone	Granteephone	Phone	Phone__c	Two-way	
Last Name	Lname	GC Last Name	Last_Name	Two-way	
MI	MInitial	Middle Initial	Middle_initial__c	Two-way	
Prefix	Prefix	Prefix	Prefix__c	Two-way	

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FIMS Relationship Record		FIMS CRM Relationship Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Primary Contact	PrimaryContact	Primary Contact	Primary_Contact__c	Two-way	
Salutation	Salutation	Salutation	Salutation__c	Two-way	
Suffix	Suffix	Suffix	Suffix__c	Two-way	

Donor Information Fields

FIMS Relationship Record		FIMS CRM Relationship 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	
Source	soucode	Source	Source__c	Two-way	
Donor Rank	rank	Donor Rank	donor_rank__c	Two-way	
Staff Code	staffcode	Staff Code	Staff_code__c	Two-way	
Anonymous	anonymous	Anonymous	anonymous__c	Two-way	
Birth Date	Birthdate	Birth Date	birth_date__c	Two-way	
Deceased	datedeceased	Deceased Date	deceased_date__c	Two-way	

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FIMS Relationship Record		FIMS CRM Relationship Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
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	
Comment	don-comment	Comment	donor_information_comments__c	Two-way	

Affiliation Code Fields

Note: New affiliation codes created in FIMS CRM will only be pushed to FIMS if they are associated with at least one profile that is managed in both systems. Codes created in FIMS CRM will not be pushed to FIMS without some association to a profile. Edited information in FIMS CRM will push to FIMS if that record has a FIMS record ID stored in FIMS CRM, indicating it is managed in both systems

FIMS Affiliation Code		FIMS CRM Affiliation Code		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
Affiliation Code	AffCode	Code Name	Code_Name	Two-way	
Description	AffDescr	Description	Description__c	Two-way	
Affiliation Group	Affil-Group	Affiliation Group	Affiliation_Group__c	Two-way	
Maintained By	Maintained-By	Maintained By	Maintained_By__c	Two-way	
Temporary	Temporary	Temporary	Temporary__c	Two-way	
Affiliation Code	AffCode	Affiliation	Affiliation__c	Two-way	

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FIMS Affiliation Code		FIMS CRM Affiliation Code		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Profile ID	Profile-ID	Profile	Profile__c	Two-way	

Contacts / Activities Fields

Note: Contacts and Activities are only synchronized if they are closed, to avoid tracking open tasks in two separate systems. Once the record is marked as closed / complete in either FIMS or FIMS CRM, it will sync to the other system for historical record-keeping purposes.

FIMS Contact Record		FIMS CRM Task / Activity Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Contact Type	cntctType	Subject	Subject	Two-way	
ID Code	IDCode	Related To	WhatID	Two-way	
ID Code	IDCode	Contact	WhoID	Two-way	
Comments	Pro-Comment	Comments	Description	Two-way	
Date	CntctDate	Due Date	ActivityDate	Two-way	
Contact ID	Cntctnum	Fims ID	FIMS_ID__c	FIMS to CRM	

Salutation Fields / Build Codes

FIMS Salutation Record		FIMS CRM Salutation Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	FI	Formal Individual	FI__c	FIMS to CRM	
*not displayed	FS	Formal Spouse	FS__c	FIMS to CRM	
*not displayed	II	Informal Individual	II__c	FIMS to CRM	

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FIMS Salutation Record		FIMS CRM Salutation Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	IS	Informal Spouse	IS__c	FIMS to CRM	
*not displayed	Default	Default Salutation	Default_Salutation__c	FIMS to CRM	

Gift History Fields

FIMS Gift History Record		FIMS CRM Gift History Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
Gift No.	GiftNum	Gift No.	Gift_No__c	FIMS to CRM	
Pledge No.	Pledgnum	Pledge No.	Pledge_No__c	FIMS to CRM	
Date	GiftDate	Date	Date__c	FIMS to CRM	
Purpose	Purcode	Purpose	Purpose__c	FIMS to CRM	
Source	Soucode	Source	Source__c	FIMS to CRM	
Type	Gifttypecode	Gift Type	Gift_type__c	FIMS to CRM	
Solicitor	Solcode	Solicitor	Solicitor__c	FIMS to CRM	
Amount	GiftAmt	Total Amount	Total_amount__c	FIMS to CRM	
Fund	Fund-Name	Fund 1	Fund_1__c	FIMS to CRM	
Fund	Fund-Name	Fund 2	Fund_2__c	FIMS to CRM	
Fund	Fund-Name	Fund 3	Fund_3__c	FIMS to CRM	
Fund	Fund-Name	Fund 4	Fund_4__c	FIMS to CRM	
Fund	Fund-Name	Fund 5	Fund_5__c	FIMS to CRM	
Fund	Fund-Name	Fund 6	Fund_6__c	FIMS to CRM	
Fund Amount	FndAmt	Amount 1	Amount_1__c	FIMS to CRM	
Fund Amount	FndAmt	Amount 2	Amount_2__c	FIMS to CRM	
Fund Amount	FndAmt	Amount 3	Amount_3__c	FIMS to CRM	
Fund Amount	FndAmt	Amount 4	Amount_4__c	FIMS to CRM	

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FIMS Gift History Record		FIMS CRM Gift History Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Fund Amount	FndAmt	Amount 5	Amount_5__c	FIMS to CRM	
Fund Amount	FndAmt	Amount 6	Amount_6__c	FIMS to CRM	
Fund Amount	FndAmt	Amount 1	Amount_1__c	FIMS to CRM	

Gift Summary Fields

FIMS Donor History Record		FIMS CRM Gift Summary Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
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	
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	

Fund Fields

FIMS Fund Association Record		FIMS CRM Fund Association Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	

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Fund Association Fields

FIMS Fund Association Record		FIMS CRM Fund Association Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
*not displayed	RecordNum	FIMS ID	FIMS_ID__c (external ID)	FIMS to CRM	
Fund ID	FundID	Fund ID	Fund_ID__c	FIMS to CRM	
Name	Fund-name	Name	Name__c	FIMS to CRM	
Rep Type	Rep-Type	Rep Type	Rep_type__c	FIMS to CRM	
Description	field rep-descr	Description	Description__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	

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	
Beginning Balance	begin-bal	Beginning Balance	beginning_balance__c	FIMS to CRM	
Ending Balance	Balance	Ending Balance	ending_balance__c	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		

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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		
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	

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 Profile Record		FIMS CRM Profile Record		Sync Type	Additional Notes
Display Name	Field Name	Display Name	Field Name		
Vendor	Vendor	Profile is Vendor	Profile_is_vendor__c	Two-way	
Grantee	Grantee	Profile is Grantee	Profile_is_grantee__c	Two-way	
Donor	Donor	Profile is Donor	Profile_is_donor__c	Two-way	
Student	Student	Profile is Student	Profile_is_student__c	Two-way	

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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.

Address Type

FIMS Address Type Code		FIMS CRM Address 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	

Title

FIMS Address Type Code		FIMS CRM Address 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_Code__c	FIMS to CRM	

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Country

FIMS Address Type Code		FIMS CRM Address 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	

Relationship

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

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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.
- Opportunities – Opportunities are tracked only in FIMS CRM. The data in these records does not sync with FIMS.
- 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