

CRM: Glossary

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Activities	<p>A historical recording of completed or to-be-completed tasks associated with a specific contact</p> <p><i>Examples: A phone call scheduled for User A to call Donor B next week, an email that went out to Donor C a month ago, a meeting in the past with Donor D 3 months ago to ask for a major donation)</i></p>
Campaign	<p>A holistic approach to fundraising that can encompass many different efforts. Examples: Capital Campaign, Annual Appeal</p>
Custom Field	<p>A field that's not included as a standard within the system. Can be placed on Contacts, Gifts, or Activities</p>
Filters	<p>The ability to segment data within the system based on any field</p>
FMV	<p>Fair Market Value. Price the product would sell for in the open market</p>
General Ledger	<p>The fund a donor can choose to designate their gift towards. Examples: Building Fund, Endowment Fund, Education Fund, Unrestricted</p>
In-Kind Good or Services	<p>A non-monetary gift</p>
Pledge	<p>The promise of a gift, usually with a specific payment schedule</p>
Solicitation	<p>How the money is received. Examples: Personal Ask, Spring Mailing, Fall Gala, Giving Tuesday Form</p>
Solicitor	<p>A designated asker, usually a board member, who is assigned a group of donors to cultivate, solicit, and steward</p>
Sub Solicitation	<p>Another layer to break down the history of the gift. Ex: auction item, donation or ticket</p>
Tags	<p>A quick way to segment your donors. Should be used sparingly and for information that does not change frequently. Examples: Board Member, Past Board Member, Major Donor, Parent, Alumni, Volunteer</p>
TDA	<p>Tax Deductible Amount. The amount of a donation a donor can claim as a tax deduction on their income tax return</p>