ADVANCE TO ASCEND TERMINOLOGY

QUICK REFERENCE

January 2021

ascend

REVISION HISTORY

Version	Date	Author	Comments	Latest ascend compatibility	Distribution Date
V1	1.15.21	Simo, Myndi	Creation.		

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The table below outlines Advance to *ascend* terminology that may be used during an implementation. Terms reference common best practice usage of *ascend*.

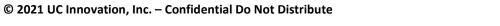| Advance Term	ascend Term
Activity	Involvement or Task
Address	Address/Address Relation
Advance Database Column or Field	Field
Advance Database Table	Object
Affiliation	Involvement or Affiliation
Allocation	Designation
Appeal/Appeal Header	Campaign/Appeal
Appeals (Entity)	Campaign Member/Campaign History
Assignment (All Levels)	Assignment
Associated Donor	Soft Credit Constituent/Organization
Attachment	File
Award and Honors	Involvement
Batch Closing	Close Session
Batch Detail/Defaults	Session Detail/Defaults
Batch Transaction List	Pre-Balance Report
Business/Organization	Organization (SF Account)
Children	Relationship – Role: Child
Clipboard	Clippy
Committee Participation	Involvement
Contact Report (All Levels)	Contact Report
Contact Report Credit	Fundraiser Contact Report Relation
Corporate Hierarchy	Parent Organization
DataLoader	Data Import Wizard, DataLoader and Additional Tools Like Jitterbit
Degrees	Degree Information
Demographic Profile/Rating/Evaluation	Wealth Rating
Econtact	Social Media
EFT or Tender of Credit Card	Recurring Gift
Email	Email
Employment	Affiliation
Entity	Constituent (SF Contact) /Organization (SF Account)/Constituent Household (SF Account)
Entity Note or Contact Report (Event Summary Specific)	Briefing
Entity Overview	Constituent Details/Overview and Household Details

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Advance Term	ascend Term
Former Spouse	Relationship – Role: Ex-Spouse
Gift/Pledge/Planned Gifts	Specific Opportunity Types
Gift Club	Giving Society/Society Membership
GoTo	Related Record/App Picker
Honor of Donor	Tribute
Instance	Sandbox/Org
Interest (Entity Level)	Involvement
Institution	Academic Organization
Lookup	Search
Mailing List	Involvement/Service Indicator
Marital Information	Relationship
Mass Update	DataLoader/Mass Edit on List View
Matching Gift	Matching Gift Payment
Matching Gift Claim	Matching Gift Opportunity Where Stage = Potential Match
Membership	Giving Society/Society Membership
Memory of Donor	Tribute
Modification	Adjustment
Name	Name
Next Step	Task
Non-Ledger Modification	Non-Monetary Adjustment
Operator	Owner
Payment Schedule	Installments
Payroll Deduction	Payroll Deduction
Philanthropic Interest/Philanthropic Affinity/Prospect Interest	Funding Interest
Physical Recognition Project	Naming Opportunity (SF Asset/Product)
Pledge Number	Opportunity Name Where Record Type = Pledge
Pledge Type	Specific Opportunity Type
Proposal	Specific Opportunity Type
Prospect	Flagged on Constituent/Organization/ Household
Receipt Number	Opportunity Name Where Record Type = Gift
Record Type	Constituent Type
Relationship	Relationship (Constituent)/Affiliation (Organization)
Relationship/Solicitation Management Members	Opportunity Team Members
Reporting Group/Permissions	Report Sharing
Reversal	Adjustment

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Advance Term	ascend Term
Rights Identifier	Permission
Salutation	Salutation
Special Handling	Service Indicator
Sports Information	Involvement
Staff Table	Users
Staff Goals/Contact Activity Summary	Work Plan/Work Plan Units
Stage (All levels)	Stage of Readiness/Stage (Proposal)
Strategies or Prospect Notes	Strategies
Student Activity	Involvement
Task (All levels)	Task/Activity
Tender/Payment Type	Tender Type
Telephone	Phone
TMS Dropdown List	Picklist Values on the Specific Object
TMS Values Related to Participation	Involvement Values
TMS Values Related to Communication Controls	Service Indicator Values
TMS_Major	Post Code
TMS_School	Academic Organization
Transaction Type	Specific Opportunity Type
View	List View
Volunteer Activity	Involvement or Volunteer Jobs (If Using Volunteer App)
Wealth and Asset	Wealth Asset
Web Community	Portal
xComment	Note