Microsoft

Dynamics 365 Banking Accelerator Entity Reference Guide

Published:

Version: 1.0

Contents

Overview

Applies To: Dynamics 365 (online)

The Microsoft Dynamics 365 Banking Accelerator ("Accelerator") is a solution released by Microsoft to help drive adoption of the Business Application Power Platform by banking partners and providers, including the Common Data Model, The Common Data Services, Dynamics and Power BI. The Accelerator contains installable solutions that include standard entity attribute extensions, new banking entities, pre-built dashboards, workflows, sample data as well as other tools to help customers and partners build and deploy new banking solutions.

This documentation provides an overview of the key entities, attributes, relationships and metadata included in the Accelerator.

Entities and Attributes

The Accelerator model contains a number of attribute extensions to existing Common Data Model entities as well as new entities. The prefix "msfsi" is consistent throughout all these extensions.
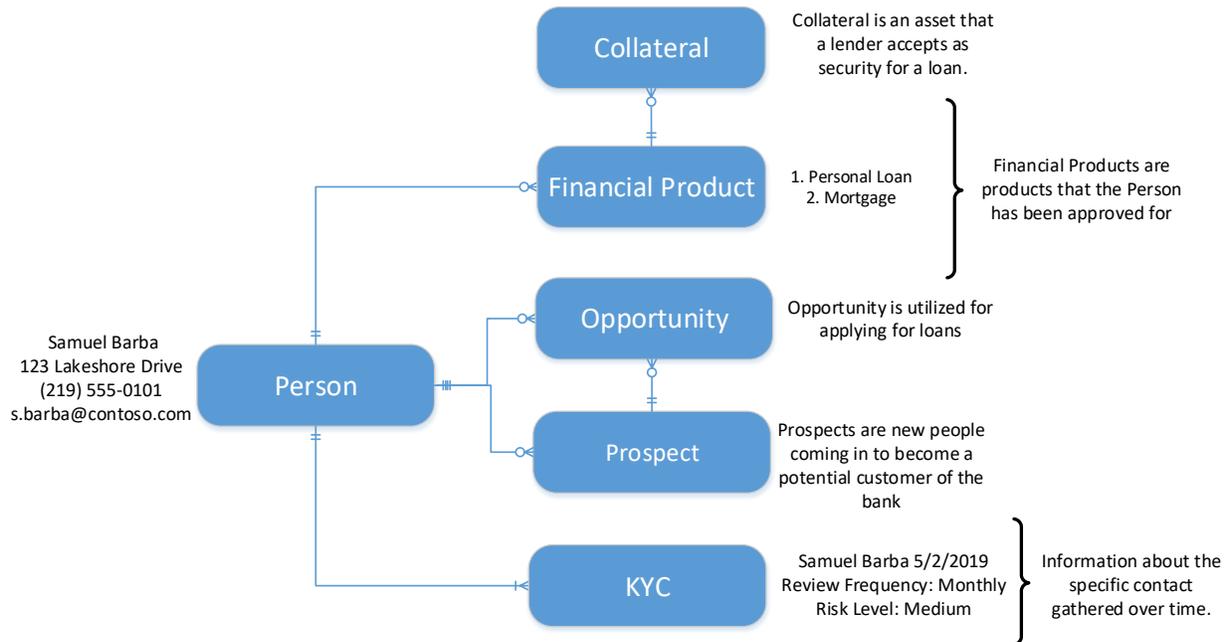
In this document, concepts that are mapped to existing entities, such as Company or Addresses, have the name of the existing entity in the title as well.

Additional metadata on the entities and the attributes can be found by installing the Accelerator and using the Dynamics metadata browser.
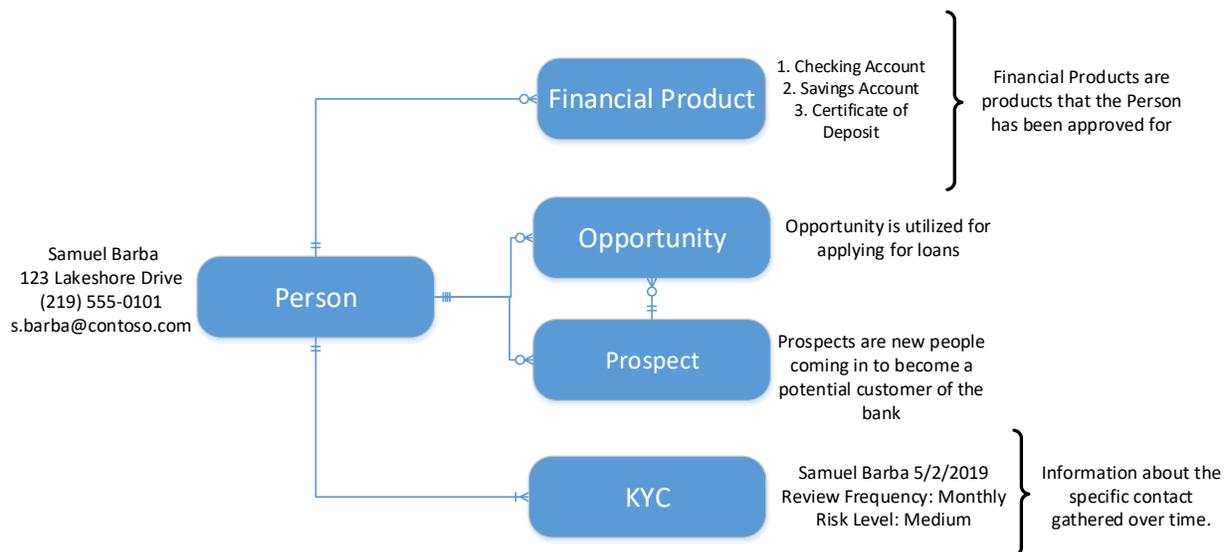
Entity Relationship Diagrams

The following conceptual entity relationship diagrams provide overviews of key entity relationships and examples in the Common Data Model.
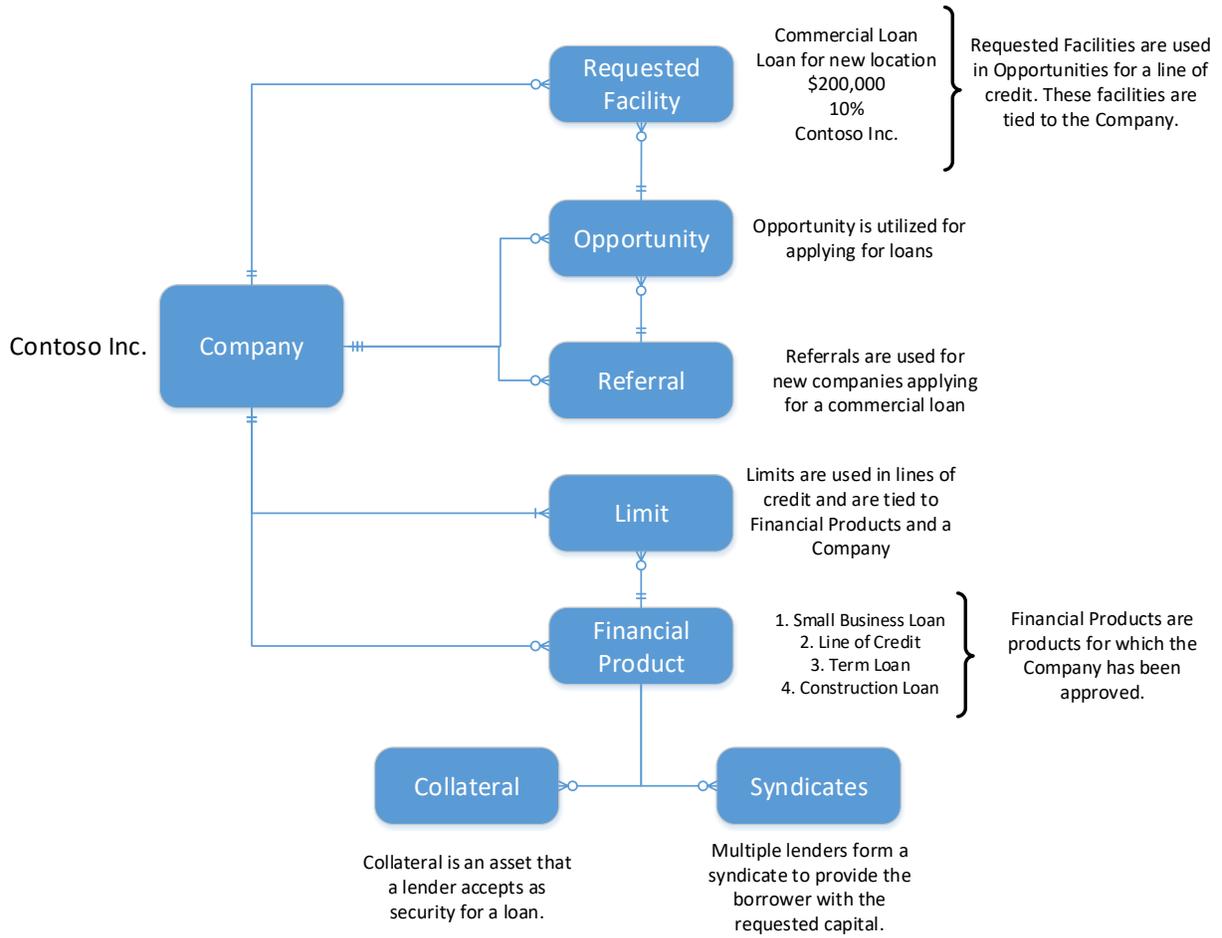
How to Model a Personal Loan or Mortgage

Entity	Notes
Collateral	Collateral is an asset that a lender accepts as security for a loan.
Financial Product	1. Personal Loan 2. Mortgage — Financial Products are products that the Person has been approved for
Opportunity	Opportunity is utilized for applying for loans
Prospect	Prospects are new people coming in to become a potential customer of the bank
KYC	Samuel Barba 5/2/2019 Review Frequency: Monthly Risk Level: Medium — Information about the specific contact gathered over time.

Person: Samuel Barba, 123 Lakeshore Drive, (219) 555-0101, s.barba@contoso.com

How to Model a Checking Account, Savings Account or Certificate of Deposit

Entity	Notes
Financial Product	1. Checking Account 2. Savings Account 3. Certificate of Deposit — Financial Products are products that the Person has been approved for
Opportunity	Opportunity is utilized for applying for loans
Prospect	Prospects are new people coming in to become a potential customer of the bank
KYC	Samuel Barba 5/2/2019 Review Frequency: Monthly Risk Level: Medium — Information about the specific contact gathered over time.

Person: Samuel Barba, 123 Lakeshore Drive, (219) 555-0101, s.barba@contoso.com

How to Model a Commercial Loan

Requested Facility

Commercial Loan
Loan for new location
$200,000
10%
Contoso Inc.

Requested Facilities are used in Opportunities for a line of credit. These facilities are tied to the Company.

Opportunity

Opportunity is utilized for applying for loans

Contoso Inc.

Company

Referral

Referrals are used for new companies applying for a commercial loan

Limit

Limits are used in lines of credit and are tied to Financial Products and a Company

Financial Product

1. Small Business Loan
2. Line of Credit
3. Term Loan
4. Construction Loan

Financial Products are products for which the Company has been approved.

Collateral

Syndicates

Collateral is an asset that a lender accepts as security for a loan.

Multiple lenders form a syndicate to provide the borrower with the requested capital.

Company

A company represents any company whose information is required to be stored in the system. This includes existing customers, qualified prospects, companies who do not have a banking relationship with the organization but are related to the organization's retail or corporate customers in capacities such as guarantor, partner, supplier, customer, etc.

The following items can be linked with an Account:
- Person
- Financial Products
- Limit
- Branch
- Bank
- Company

Attributes

Logical Name	Type	Description
address1_composite	Memo	Shows the complete primary address.
msfsi_annualreviewdate	DateTime	The date on which the company's relationship with the bank needs to be reviewed (i.e. account planning to be done).
msfsi_availablelimit	Money	Total amount remaining from the credit line/limit implemented against the client.
msfsi_banksytdrevenue	Money	Total revenue generated by the bank from the sales to the client and services utilized by the client in the current year.
msfsi_companysprofitinthelastyear	Money	Total profit earned by the company in the previous year as reported by them in their financial reports.
msfsi_companyturnoverinthelastyear	Money	Company's annual turnover amount as reported by them in their financial reports.
msfsi_dayspastdue	Integer	Number of days for which the client has been in Past Due status,
msfsi_enrollmentbranchid	Lookup	The bank's branch at which customer was enrolled.

msfsi_implementedlimit	Money	Total credit line/limit implemented in the core banking system or Limit Management System for the client to utilize.
msfsi_limitreviewdate	DateTime	Date on which the company's main credit line/limit will be expired.
msfsi_pastduesince	DateTime	The date on which the company missed the first payment against the borrowings.
msfsi_profittier	Picklist	Internal ranking of the commercial customer based on profitability to the bank
msfsi_returnoncapital	Decimal	The rate of risk adjusted return on capital of the company.
msfsi_riskrating	Picklist	The rating assigned to the client by the bank in overall risk as reported by risk rating tools such as Moody's.
msfsi_totaldeposits	Money	Company's total deposits with our bank including all the savings, current, and deposit accounts.
msfsi_totallimit	Money	Total credit line/limit assigned to the company by our bank.
msfsi_totalloans	Money	Company's total loans with the bank,
msfsi_totalpastdue	Money	Total amount of borrowings for which the repayment by the client is overdue.
msfsi_utilizedlimit	Money	Total credit that has been utilized by the company from the assigned limit (by cash based and non-cash based borrowings).
name	String	Type the company or business name.
numberofemployees	Integer	Type the number of employees that work at the account for use in marketing segmentation and demographic analysis.

ownerid	Owner	Enter the user or team who is assigned to manage the record. This field is updated every time the record is assigned to a different user.
parentaccountid	Lookup	Choose the parent account associated with this account to show parent and child businesses in reporting and analytics.
primarycontactid	Lookup	Choose the primary contact for the account to provide quick access to contact details.
revenue	Money	Type the annual revenue for the account, used as an indicator in financial performance analysis.
telephone1	String	Type the main phone number for this account.
websiteurl	String	Type the account's website URL to get quick details about the company profile.

Person

A person record is one associated with a patron of the bank. In retail banking, the person record can apply for any of the retail loans such as; checking accounts, deposits, and loan products. The person record holds different pieces of financial information that helps a loan officer determine whether or not a person is worth the risk that they may carry.

The following items can be linked with a Person:
- Address
- Activities
- KYCs
- Referrals
- Prospects
- Opportunities
- Financial Products
- Companies

Attributes

Logical Name	Type	Description
address1_composite	Memo	Shows the complete primary address.
anniversary	DateTime	Enter the date of the contact's wedding or service anniversary for use in customer gift programs or other communications.
birthdate	DateTime	The person's date of birth as per the identification document.
customertypecode	Picklist	Type of person's relationship with the bank. This field must be set by the system through different processes such as customer enrollment, data migration, or complaints and opportunity capture.
donotsendmm	Boolean	Select whether the contact accepts marketing materials, such as brochures or catalogs. Contacts that opt out can be excluded from marketing initiatives.
emailaddress1	String	Type the primary email address for the contact.
fax	String	Type the fax number for the contact.
fullname	String	Combines and shows the contact's first and last names so that the full name can be displayed in views and reports.
gendercode	Picklist	Select the contact's gender to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns.
jobtitle	String	Type the job title of the contact to make sure the contact is addressed correctly in sales calls, email, and marketing campaigns.

lastusedincampaign	DateTime	Shows the date when the contact was last included in a marketing campaign or quick campaign.
middlename	String	Type the contact's middle name or initial to make sure the contact is addressed correctly.
mobilephone	String	Type the mobile phone number for the contact.
msfsi_billpay	Boolean	Flag indicating whether the person's has bill pay enabled
msfsi_chargestartdate	DateTime	The date from which charges must apply to the customer.
msfsi_churnscore	Decimal	The person's probability of churn (i.e. probability that the customer will leave the bank) as calculated in relevant back-end systems and analytical engines.
msfsi_creditscore	Integer	Latest Credit Score run against the customer
msfsi_defaultchargeaccountid	Lookup	Default account of the customer to be charged for different transaction fees and service charges that apply to the person based on service requests and transactions requested and carried out in branch
msfsi_delinquencyscore	Integer	The bucket number in which customer falls according to his total overdue amount and past due days.
msfsi_delinquentamount	Money	Total amount of payments that is overdue against the person's existing loans and credit cards, for which he has become delinquent.
msfsi_directdeposit	Boolean	Flag indicating whether the person's salary is transferred to this bank or not.
msfsi_employerid	Lookup	The company at which the person works.
msfsi_employmentstatus	Picklist	The status of person's employment such as salaried or self-employed.

msfsi_enrollmentbranchid	Lookup	The branch at which the customer was enrolled.
msfsi_idexpirydate	DateTime	The date of expiry of the identification document provided by the person.
msfsi_idtype	Picklist	The type of identification document that the prospect has provided to the bank such as passport or national ID card in case of Retail prospect, or the trade license or registration certificate, in cas
msfsi_isminor	Boolean	Indication of whether the person is Minor.
msfsi_placeofbirth	String	The person's place of birth as per the identification document.
msfsi_preferredbranchid	Lookup	The branch which the customer prefers to deal with.
msfsi_primarymonthlyincome	Money	The person's primary income per month.
msfsi_profittier	Picklist	Internal ranking of the retail customer based on profitability to the bank
msfsi_residencystatus	Picklist	The person's status of residency in the country where he/she has a relationship with the bank.
msfsi_residentincountrysince	DateTime	Date from which the person has been resident of the country (if the person not a citizen and is a resident in the country where he/she has a relationship with the bank).
msfsi_totaldeposits	Money	The total amount of Assets Under Management for the person with the bank as of now (total deposits and investments that the customer has with the bank).
msfsi_totalloans	Money	The total amount of Risks Under Management for the person with the bank as of now (total outstanding

		amount of loans and credit cards).
msfsi_visaexpiry	DateTime	The expiry date of the person's residence permit in the country where he/she has a relationship with the bank.
msfsi_waivecharges	Boolean	Indication of whether the charges against different services and transactions must be waived for the customer. Charge waiver flag would be set to Yes for specific customers by the bank based on custom
new_debtburdenratio	Decimal	Debt Burden Ratio (%) of the person based on the person's monthly income and liabilities.
originatingleadid	Lookup	Shows the lead that the contact was created if the contact was created by converting a lead in Microsoft Dynamics 365. This is used to relate the contact to the data on the originating lead for use in reporting and analytics.
ownerid	Owner	Enter the user or team who is assigned to manage the record. This field is updated every time the record is assigned to a different user.
parentcustomerid	Customer	Select the parent account or parent contact for the contact to provide a quick link to additional details, such as financial information, activities, and opportunities.
preferredcontactmethodcode	Picklist	Select the preferred method of contact.
spousesname	String	Type the name of the contact's spouse or partner for reference during calls, events, or other communications with the contact.
telephone1	String	Type the main phone number for this contact.

Prospect

A prospect represents a potential customer or sale happening in the system. A prospect can be represented by either prospects or referrals. Prospects are leads that come from internal sources while a referral comes from external sources. They are represented in the system by the Lead Source field. These prospects can be qualified into opportunities in the system.

The following items can be linked with a prospect:
- Address
- Person
- Opportunity
- Company
- Product
- Financial Product

Attributes

Logical Name	Type	Description
address1_composite	Memo	Shows the complete primary address.
campaignid	Lookup	Choose the campaign that the lead was generated from to track the effectiveness of marketing campaigns and identify communications received by the lead.
companyname	String	Type the name of the company associated with the lead. This becomes the account name when the lead is qualified and converted to a customer account.
description	Memo	Type additional information to describe the lead, such as an excerpt from the company's website.
donotbulkemail	Boolean	Select whether the lead accepts bulk email sent through marketing campaigns or quick campaigns. If Do Not Allow is selected, the lead can be added to marketing lists,

		but will be excluded from the email.
donotemail	Boolean	Select whether the lead allows direct email sent from Microsoft Dynamics 365.
donotphone	Boolean	Select whether the lead allows phone calls.
donotpostalmail	Boolean	Select whether the lead allows direct mail.
donotsendmm	Boolean	Select whether the lead accepts marketing materials, such as brochures or catalogs. Leads that opt out can be excluded from marketing initiatives.
emailaddress1	String	Type the primary email address for the lead.
followemail	Boolean	Information about whether to allow following email activity like opens, attachment views and link clicks for emails sent to the lead.
fullname	String	Combines and shows the lead's first and last names so the full name can be displayed in views and reports.
industrycode	Picklist	Select the primary industry in which the lead's business is focused, for use in marketing segmentation and demographic analysis.
jobtitle	String	Type the job title of the primary contact for this lead to make sure the prospect is addressed correctly in sales calls, email, and marketing campaigns.
lastusedincampaign	DateTime	Shows the date when the lead was last included in a marketing campaign or quick campaign.
leadqualitycode	Picklist	Select a rating value to indicate the lead's potential to become a customer.

leadsourcecode	Picklist	Select the primary marketing source that prompted the lead to contact you.
mobilephone	String	Type the mobile phone number for the primary contact for the lead.
msfsi_employer	String	The name of the company where the prospect is employed, for retail prospects.
msfsi_idno	String	The number of the identification document provided by the person or company such as the passport number or the national ID card number in case of Retail prospect,, or the trade license number, in case
msfsi_interestedproductid	Lookup	The main product of the bank that the prospect is interested in.
msfsi_prospecttype	Picklist	Flag indicating the type of the prospect.
msfsi_referredbyexternal	Lookup	
msfsi_referredbyinternal	Lookup	
numberofemployees	Integer	Type the number of employees that work at the company associated with the lead, for use in marketing segmentation and demographic analysis.
ownerid	Owner	Owner Id
parentaccountid	Lookup	Choose an account to connect this lead to, so that the relationship is visible in reports and analytics.
parentcontactid	Lookup	Choose a contact to connect this lead to, so that the relationship is visible in reports and analytics.
preferredcontactmethodcode	Picklist	Select the preferred method of contact.
revenue	Money	Type the annual revenue of the company associated with the lead to provide an understanding of the prospect's business.

sic	String	Type the Standard Industrial Classification (SIC) code that indicates the lead's primary industry of business for use in marketing segmentation and demographic analysis.
statuscode	Status	Select the lead's status.
subject	String	Type a subject or descriptive name, such as the expected order, company name, or marketing source list, to identify the lead.
telephone1	String	Type the work phone number for the primary contact for the lead.
transactioncurrencyid	Lookup	Choose the local currency for the record to make sure budgets are reported in the correct currency.
websiteurl	String	Type the website URL for the company associated with this lead.

Bank

A bank represents a physical bank location within the bank network. The banks contain information such as the name and location of the bank. This is used alongside the branches.

The following items can be linked with a bank:
- Address
- Branches

Attributes

Logical Name	Type	Description
createdby	Lookup	Unique identifier of the user who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A
createdon	DateTime	Date and time when the record was created.

createdonbehalfby	Lookup	Unique identifier of the delegate user who created the record.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
importsequencenumber	Integer	Sequence number of the import that created this record.
modifiedby	Lookup	Unique identifier of the user who modified the record.
modifiedbyname	String	N/A
modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Unique identifier of the delegate user who modified the record.
modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msfsi_addressline1	String	
msfsi_addressline2	String	
msfsi_addressline3	String	
msfsi_bankcode	String	Bank Code
msfsi_bankid	Uniqueidentifier	Unique identifier for entity instances
msfsi_bankname	String	The name of the custom entity
msfsi_country	String	
msfsi_state	String	
msfsi_telelphoneno	String	
msfsi_zipcodes	String	
overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner
owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record
owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.
statecode	State	Status of the Bank

statecodename	Virtual	N/A
statuscode	Status	Reason for the status of the Bank
statuscodename	Virtual	N/A
timezoneruleversionnumber	Integer	For internal use only.
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number

Branch

A branch is used to represent an exact location of a bank. This is used in the person and company entities to represent where they were enrolled and where the customers prefer to bank. It holds information such as the manager, location, branch name, and which bank it is associated with.

The following items can be linked with a branch:
- Address
- Bank
- Company
- Person

Attributes

Logical Name	Type	Description
createdby	Lookup	Unique identifier of the user who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A
createdon	DateTime	Date and time when the record was created.
createdonbehalfby	Lookup	Unique identifier of the delegate user who created the record.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
importsequencenumber	Integer	Sequence number of the import that created this record.
modifiedby	Lookup	Unique identifier of the user who modified the record.

modifiedbyname	String	N/A
modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Unique identifier of the delegate user who modified the record.
modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msfsi_addressline1	String	
msfsi_addressline2	String	
msfsi_addressline3	String	
msfsi_bankid	Lookup	
msfsi_bankidname	String	N/A
msfsi_branchcode	String	Imported as part of daily data import to D365
msfsi_branchid	Uniqueidentifier	Unique identifier for entity instances
msfsi_branchmanagerid	Lookup	Branch Manager
msfsi_branchmanageridname	String	N/A
msfsi_branchmanageridyominame	String	N/A
msfsi_branchname	String	The name of the custom entity
msfsi_country	String	
msfsi_state	String	
msfsi_telephoneno	String	
msfsi_zipcodes	String	
overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner
owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record
owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.
statecode	State	Status of the Branch
statecodename	Virtual	N/A
statuscode	Status	Reason for the status of the Branch
statuscodename	Virtual	N/A

timezoneruleversionnumber	Integer	For internal use only.
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number

Collateral

Collateral is used to represent any collateral information related to a commercial loan product that the customer has tied to them. This collateral can then be used to determine whether or not a customer has a high risk level for any other loans they may be applying for.

The following items can be linked with a collateral:
- Company
- Financial Product

Attributes

Logical Name	Type	Description
createdby	Lookup	Unique identifier of the user who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A
createdon	DateTime	Date and time when the record was created.
createdonbehalfby	Lookup	Unique identifier of the delegate user who created the record.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
exchangerate	Decimal	Exchange rate for the currency associated with the entity with respect to the base currency.
importsequencenumber	Integer	Sequence number of the import that created this record.
modifiedby	Lookup	Unique identifier of the user who modified the record.
modifiedbyname	String	N/A

modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Unique identifier of the delegate user who modified the record.
modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msfsi_collateralid	Uniqueidentifier	Unique identifier for entity instances
msfsi_collateraltype	Picklist	Type of collateral provided by the client as security against the loan.
msfsi_collateraltypename	Virtual	N/A
msfsi_collateralvalue	Money	The value of the collateral as per the evaluation done.
msfsi_collateralvalue_base	Money	Value of the Collateral Value in base currency.
msfsi_coverage	Decimal	The amount of the loan that is secured/covered by the specified collateral.
msfsi_dateofvaluation	DateTime	The date on which the collateral was evaluated/appraised.
msfsi_description	String	Description of the collateral.
msfsi_evaluatedby	String	The name of the firm that evaluated/appraised the collateral.
msfsi_financialproductid	Lookup	Reference to the loan product for which the collateral is defined.
msfsi_financialproductidname	String	N/A
msfsi_name	String	The name of the custom entity.
msfsi_nextdateofvaluation	DateTime	The date on which the collateral needs to be re-evaluated.
overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner
owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record

owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.
processid	Uniqueidentifier	Contains the id of the process associated with the entity.
stageid	Uniqueidentifier	Contains the id of the stage where the entity is located.
statecode	State	Status of the Collateral
statecodename	Virtual	N/A
statuscode	Status	Reason for the status of the Collateral
statuscodename	Virtual	N/A
timezoneruleversionnumber	Integer	For internal use only.
transactioncurrencyid	Lookup	Unique identifier of the currency associated with the entity.
transactioncurrencyidname	String	N/A
traversedpath	String	A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur.
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number

Financial Product

A financial product represents the different offerings a bank or branch may offer to their customers. The financial product entity houses information about 4 different product families between both Commercial and Retail banking. When an opportunity has been won, that information can be put into a financial product and it can be tied to the customer who applied for it. The limits set on certain financial products are rolled up to Companies to keep track of all the loans from the bank.

The following items can be linked with a financial product:
- Company
- Person
- Product
- Product Family
- Limit

- Branch
- Opportunity

Attributes

Logical Name	Type	Description
createdby	Lookup	Unique identifier of the user who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A
createdon	DateTime	Date and time when the record was created.
createdonbehalfby	Lookup	Unique identifier of the delegate user who created the record.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
exchangerate	Decimal	Exchange rate for the currency associated with the entity with respect to the base currency.
importsequencenumber	Integer	Sequence number of the import that created this record.
modifiedby	Lookup	Unique identifier of the user who modified the record.
modifiedbyname	String	N/A
modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Unique identifier of the delegate user who modified the record.
modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msfsi_availablebalance	Money	The balance of the product at the time that the information is imported to D365 or when the information is retrieved in real-time form the backend system (such as the account balance). This is the amo

msfsi_availablebalance_base	Money	Value of the Available Balance in base currency.
msfsi_averagebalance	Money	The average balance in the account calculated over a chosen period of time by the bank.
msfsi_averagebalance_base	Money	Value of the Average Balance in base currency.
msfsi_balanceatmaturity	Money	The total amount that will be available in the account at the time of deposit maturity, which would include the principal deposit amount and the interest earned.
msfsi_balanceatmaturity_base	Money	Value of the Balance at Maturity in base currency.
msfsi_blockedamount	Money	The amount of the account's balance that has been blocked/reserved by the bank for a specific purpose or a as a security measure.
msfsi_blockedamount_base	Money	Value of the Blocked Amount in base currency.
msfsi_bookbalance	Money	The balance available on the account (excluding the cheques pending clearing, deposits in transit, or any other deductions on the account).
msfsi_bookbalance_base	Money	Value of the Book Balance in base currency.
msfsi_branchid	Lookup	The branch at which this product was originated.
msfsi_branchidname	String	N/A
msfsi_capitalarrears	Money	Total overdue principal amount on the loan.
msfsi_capitalarrears_base	Money	Value of the Capital Arrears in base currency.
msfsi_collectionrisk	Picklist	The risk of collection/repayment by the customer.
msfsi_collectionriskname	Virtual	N/A
msfsi_customerid	Customer	The customer to whom the product belongs.
msfsi_customerididtype	EntityName	N/A

msfsi_customeridname	String	N/A
msfsi_customeridyominame	String	N/A
msfsi_dayspastdue	Integer	The number of days that the customer has been in overdue status for this loan account.
msfsi_debttype	Picklist	Debt type of the loan.
msfsi_debttypename	Virtual	N/A
msfsi_delinquencystatus	Picklist	Indication of whether the customer's loan is delinquent or not (i.e. whether any payments are overdue or not).
msfsi_delinquencystatusname	Virtual	N/A
msfsi_disbursedamount	Money	The amount of loan that has been disbursed to the customer so far.
msfsi_disbursedamount_base	Money	Value of the Disbursed Amount in base currency.
msfsi_disbursementdate	DateTime	The date on which the loan was disbursed to the customer's account.
msfsi_financialproductid	Uniqueidentifier	Unique identifier for entity instances
msfsi_initialdeposit	Money	The amount that was initially deposited by the customer in to the account when the account was first opened. This information is part of the Account Opening KYC.
msfsi_initialdeposit_base	Money	Value of the Initial Deposit in base currency.
msfsi_initialdepositsource	String	The source of funds that was initially deposited in to the account. This information is part of the Account Opening KYC.
msfsi_installmentamount	Money	The equal installment amounts that the customer pays back to the bank towards the loan on a monthly basis (EMI).
msfsi_installmentamount_base	Money	Value of the Installment Amount in base currency.
msfsi_interestamount	Money	The total amount of interest to be paid by the customer

		on the amount borrowed from the bank.
msfsi_interestamount_base	Money	Value of the Interest Amount in base currency.
msfsi_interestarrears	Money	Total overdue interest amount on the loan.
msfsi_interestarrears_base	Money	Value of the Interest Arrears in base currency.
msfsi_interestrate	Decimal	The rate of interest applied to the loan, based on which the customer will pay interest on the loan for the duration of the loan.
msfsi_issyndicated	Boolean	Flag indicating the loan is syndicated or not
msfsi_issyndicatedname	Virtual	N/A
msfsi_jointtype	Picklist	Indication of the account's operation type as single or joint.
msfsi_jointtypename	Virtual	N/A
msfsi_lastpaymentamount	Money	The amount that was paid by the customer towards the loan in the last repayment.
msfsi_lastpaymentamount_base	Money	Value of the Last Payment Amount in base currency.
msfsi_lastpaymentdate	DateTime	The date on which the last repayment towards the loan was made by the customer.
msfsi_limitid	Lookup	The Limit of the customer or account
msfsi_limitidname	String	N/A
msfsi_loanmaturitydate	DateTime	The date on which the last repayment towards the loan will be made, and the customer's full borrowing will be paid back.
msfsi_loanstartdate	DateTime	The date on which the first repayment on the loan is made.
msfsi_loantype	Picklist	The type of loan that the customer has availed from the bank such as a new loan or a top up.
msfsi_loantypename	Virtual	N/A

msfsi_maturitydate	DateTime	The date on which the fixed deposit will reach maturity and customer can withdraw from the account.
msfsi_maturityinstructionsdetails	String	The instructions given by the customer to be taken on the account upon maturity such as transfer of interest to another account, or transfer of principal and interest amount to another account, or rol
msfsi_modeofpayment	Picklist	The method that customer is making repayments towards the loan.
msfsi_modeofpaymentname	Virtual	N/A
msfsi_nextpaymentamount	Money	The amount that needs to be paid by the customer towards the loan in the next installment.
msfsi_nextpaymentamount_base	Money	Value of the Next Payment Amount in base currency.
msfsi_nextpaymentdate	DateTime	The date on which the next repayment towards the loan is due.
msfsi_number	String	The name of the custom entity.
msfsi_numberofdeferralsmade	Integer	Total number of installment deferrals made by the customer (i.e. number of times customer has taken a loan repayment holiday from the bank).
msfsi_numberofinstallmentspaid	Integer	Total number of installments that have been paid back by the customer so far.
msfsi_openingdate	DateTime	The date on which the account was opened.
msfsi_outstandingprincipalamount	Money	The total amount remaining to be paid back by the customer towards the loan's principal amount.
msfsi_outstandingprincipalamount_base	Money	Value of the Outstanding Principal Amount in base currency.

msfsi_outstandingtotalamount	Money	The total amount remaining to be paid back by the customer towards the loan's principal amount and the interest amount.
msfsi_outstandingtotalamount_base	Money	Value of the Outstanding Total Amount in base currency.
msfsi_overdraftlimit	Money	The overdraft limit given by the bank to the customer on this account. This is the amount that customer can withdraw from the account, when the account reaches zero balance.
msfsi_overdraftlimit_base	Money	Value of the Overdraft Limit in base currency.
msfsi_overdraftrate	Decimal	The interest rate that will be applied to the customer for repayment, if the account falls into overdraft.
msfsi_overduedate	DateTime	The date on which the repayment was missed and the loan became overdue.
msfsi_overdueinstallmentamount	Money	The total amount of repayments towards the loan which have been missed by the customer and are overdue.
msfsi_overdueinstallmentamount_base	Money	Value of the Overdue Installment Amount in base currency.
msfsi_principalamount	Money	The amount that the customer has borrowed from the bank.
msfsi_principalamount_base	Money	Value of the Principal Amount in base currency.
msfsi_productfamilyid	Lookup	Lookup to product family from D365
msfsi_productfamilyidname	String	N/A
msfsi_productid	Lookup	Name of the product held by the customer such as Savings Account or Car Loan.
msfsi_productidname	String	N/A
msfsi_projectedinterestamount	Money	The amount of interested expected to be earned on

		the account based on the interest rate.
msfsi_projectedinterestamount_base	Money	Value of the Projected Interest Amount in base currency.
msfsi_purposeofloan	String	The customer's purpose in borrowing from the bank such as holidays or home renovation.
msfsi_rate	Decimal	The rate of interest applied to the deposit account based on which interest will be earned during the defined period/term.
msfsi_sourceoffunds	String	The source of funds that will be deposited into the account throughout the account's lifecycle. This information is part of the Account Opening KYC.
msfsi_term	Integer	The number of months that the deposit account has been set up for.
msfsi_totalarrear	Money	Total overdue amount on the loan.
msfsi_totalarrear_base	Money	Value of the Total Arrear in base currency.
msfsi_totalinterestpaid	Money	Total amount of payments made towards interest of the loan to date.
msfsi_totalinterestpaid_base	Money	Value of the Total Interest Paid in base currency.
msfsi_unclearedbalance	Money	The amount of funds yes to be credited to the account, pending to be cleared, (such as cheques favouring the account).
msfsi_unclearedbalance_base	Money	Value of the Uncleared Balance in base currency.
msfsi_unsecuredamount	Money	Total amount of the loan that is not secured.
msfsi_unsecuredamount_base	Money	Value of the Unsecured Amount in base currency.
overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner

owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record
owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.
processid	Uniqueidentifier	Contains the id of the process associated with the entity.
stageid	Uniqueidentifier	Contains the id of the stage where the entity is located.
statecode	State	Status of the Financial Product
statecodename	Virtual	N/A
statuscode	Status	Reason for the status of the Financial Product
statuscodename	Virtual	N/A
timezoneruleversionnumber	Integer	For internal use only.
transactioncurrencyid	Lookup	Unique identifier of the currency associated with the entity.
transactioncurrencyidname	String	N/A
traversedpath	String	A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur.
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number

KYC

A KYC or Know Your Customer is used in the system to gather information on your customer in a regular interval. The KYCs collect information such as where they live, collecting their updated or different ID information, and their risk level at that point in time. These KYCs can be used to help predict whether a customer is becoming more or less of a risk.

The following items can be linked with a KYC:
- Company
- Person

Attributes

Logical Name	Type	Description
createdby	Lookup	Unique identifier of the user who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A
createdon	DateTime	Date and time when the record was created.
createdonbehalfby	Lookup	Unique identifier of the delegate user who created the record.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
importsequencenumber	Integer	Sequence number of the import that created this record.
modifiedby	Lookup	Unique identifier of the user who modified the record.
modifiedbyname	String	N/A
modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Unique identifier of the delegate user who modified the record.
modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msfsi_additionalnationality	String	The person's second nationality (if he/she has dual nationality).
msfsi_businesslicenseexpirydate	DateTime	The company's trade license/commercial registration expiry date.
msfsi_businesslicensenumber	String	The company's trade license/commercial registration number.

msfsi_controllinguscitizenortaxresident	Boolean	Indication of whether the customer is a citizen of the United States or a tax resident.
msfsi_controllinguscitizenortaxresidentname	Virtual	N/A
msfsi_countryofbirth	String	The person's country of birth as per the identification document.
msfsi_countryofresidence	String	The country in which the person primarily resides.
msfsi_customerid	Customer	Customer that the KYC record is created against.
msfsi_customerididtype	EntityName	N/A
msfsi_customeridname	String	N/A
msfsi_customeridyominame	String	N/A
msfsi_dateofbirth	DateTime	The person's date of birth as per the identification document.
msfsi_email	String	The primary e-mail address of the person.
msfsi_firstname	String	First name of the person.
msfsi_idexpirydate	DateTime	The date of expiry of the identification document provided by the person.
msfsi_idnumber	String	The number of the identification document provided by the person such as the passport number or the national ID card number.
msfsi_idtype	Picklist	The type of identification document that the person has provided to the bank such as passport or national ID card.
msfsi_idtypename	Virtual	N/A
msfsi_kyccountry	String	Country for which KYC has been performed against the customer. Each country may have different set of fields for KYC. This flag drives the system to show or hide the necessary fields.
msfsi_kycid	Uniqueidentifier	Unique identifier for entity instances

msfsi_kycpreparedon	DateTime	Date on which KYC check was performed.
msfsi_lastname	String	Last name of the person.
msfsi_middlename	String	Middle name of the person.
msfsi_mobilenumber	String	The primary mobile phone number for the person.
msfsi_name	String	The name of the custom entity.
msfsi_nationality	String	The person's primary nationality.
msfsi_natureofbusiness	String	Nature of the company's business
msfsi_phonenumber	String	The primary phone number of the company
msfsi_placeofbirth	String	The person's place of birth as per the identification document.
msfsi_primarycontact	Lookup	The person who is the main contact person at the company.
msfsi_primarycontactname	String	N/A
msfsi_primarycontactyominame	String	N/A
msfsi_reviewfrequency	Picklist	The frequency based on which customer must be reviewed.
msfsi_reviewfrequencyname	Virtual	N/A
msfsi_risklevel	Picklist	The general risk level of the customer.
msfsi_risklevelname	Virtual	N/A
overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner
owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record
owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.

processid	Uniqueidentifier	Contains the id of the process associated with the entity.
stageid	Uniqueidentifier	Contains the id of the stage where the entity is located.
statecode	State	Status of the KYC
statecodename	Virtual	N/A
statuscode	Status	Reason for the status of the KYC
statuscodename	Virtual	N/A
timezoneruleversionnumber	Integer	For internal use only.
traversedpath	String	A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur.
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number

Limit

A limit represents corporate client's limits set up in the limit management system or the bank's backend systems such as core banking, treasury, or trade finance systems. This data is imported into D365 through daily batch migrations to be viewed as part of the single view.

The following items can be linked with a Limit:
- Company
- Product

Attributes

Logical Name	Type	Description
createdby	Lookup	Unique identifier of the user who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A

createdon	DateTime	Date and time when the record was created.
createdonbehalfby	Lookup	Unique identifier of the delegate user who created the record.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
exchangerate	Decimal	Exchange rate for the currency associated with the entity with respect to the base currency.
importsequencenumber	Integer	Sequence number of the import that created this record.
modifiedby	Lookup	Unique identifier of the user who modified the record.
modifiedbyname	String	N/A
modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Unique identifier of the delegate user who modified the record.
modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msfsi_availablelimit	Money	
msfsi_availablelimit_base	Money	Value of the Available Limit in base currency.
msfsi_companyid	Lookup	Reference to the corporate client for which the limit is implemented.
msfsi_companyidname	String	N/A
msfsi_companyidyominame	String	N/A
msfsi_implementedamount	Money	Total amount implemented in the limit management/core banking/treasury/ trade finance system.
msfsi_implementedamount_base	Money	Value of the Implemented Amount in base currency.
msfsi_limitexpiry	DateTime	The date on which the limit will expiry and will require review/renewal by the bank.
msfsi_limitid	Uniqueidentifier	Unique identifier for entity instances
msfsi_limitname	String	Name of the limit implemented for the client.

msfsi_limittype	Picklist	The type of limit implemented for the client.
msfsi_limittypename	Virtual	N/A
msfsi_productid	Lookup	The specific product that the limit is implemented for (applicable only if the bank ties limits to products such term loan, Import LC, or FX rather than a high-level funded/non-funded classification).
msfsi_productidname	String	N/A
msfsi_utilizedamount	Money	Total amount utilized by the client so far through different products of the bank such as loans and guarantees.
msfsi_utilizedamount_base	Money	Value of the Utilized Amount in base currency.
overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner
owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record
owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.
statecode	State	Status of the Limit
statecodename	Virtual	N/A
statuscode	Status	Reason for the status of the Limit
statuscodename	Virtual	N/A
timezoneruleversionnumber	Integer	For internal use only.
transactioncurrencyid	Lookup	Unique identifier of the currency associated with the entity.
transactioncurrencyidname	String	N/A
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number

Requested Facility

A requested facility represents a facility that is requested by a corporate customer applying for line of credit. Multiple facilities can be associated with an opportunity for a line of credit. These facilities will help determine whether the opportunity will be a worthwhile venture for the bank.

The following items can be linked with a requested facility:
- Company
- Product
- Opportunity

Attributes

Logical Name	Type	Description
createdby	Lookup	Unique identifier of the user who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A
createdon	DateTime	Date and time when the record was created.
createdonbehalfby	Lookup	Unique identifier of the delegate user who created the record.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
exchangerate	Decimal	Exchange rate for the currency associated with the entity with respect to the base currency.
importsequencenumber	Integer	Sequence number of the import that created this record.
modifiedby	Lookup	Unique identifier of the user who modified the record.
modifiedbyname	String	N/A
modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Unique identifier of the delegate user who modified the record.

modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msfsi_amount	Money	The amount of the facility that customer is applying for under the requested line of credit such as the bank guarantee amount or term loan amount.
msfsi_amount_base	Money	Value of the Amount in base currency.
msfsi_companyid	Lookup	The company that is requesting
msfsi_companyidname	String	N/A
msfsi_companyidyominame	String	N/A
msfsi_fundingevent	Picklist	Indication of when the client needs the funding of this facility to be done; immediately upon implementation of the line of credit, or at a later time.
msfsi_fundingeventname	Virtual	N/A
msfsi_interestrate	Decimal	The rate of interest applicable to the selected facility. The applicable rate must be fetched from the product catalog based on the requested amount.
msfsi_name	String	The name of the custom entity.
msfsi_opportunityid	Lookup	Lookup to Opportunity
msfsi_opportunityidname	String	N/A
msfsi_processingcharges	Decimal	The processing charges applicable to the selected facility. The applicable rate must be fetched from the product catalog based on the requested amount.
msfsi_productid	Lookup	The facility that the corporate customer is requesting as part of the credit line application.
msfsi_productidname	String	N/A
msfsi_purpose	String	The purpose of the facility requested under the credit line.
msfsi_requestedfacilityid	Uniqueidentifier	Unique identifier for entity instances

overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner
owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record
owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.
processid	Uniqueidentifier	Contains the id of the process associated with the entity.
stageid	Uniqueidentifier	Contains the id of the stage where the entity is located.
statecode	State	Status of the Requested Facility
statecodename	Virtual	N/A
statuscode	Status	Reason for the status of the Requested Facility
statuscodename	Virtual	N/A
timezoneruleversionnumber	Integer	For internal use only.
transactioncurrencyid	Lookup	Unique identifier of the currency associated with the entity.
transactioncurrencyidname	String	N/A
traversedpath	String	A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur.
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number

Syndicate

A syndicate represents the information related to a commercial loan product that the customer holds with the bank. The syndicate will reference a specific loan, the contribution percentage, the amount and

the specific bank that holds the syndicate. Though loan will be associated through the number on the financial product.

The following items can be linked with a syndicate:
- Financial Product
- Bank

Attributes

Logical Name	Type	Description
createdby	Lookup	Unique identifier of the user who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A
createdon	DateTime	Date and time when the record was created.
createdonbehalfby	Lookup	Unique identifier of the delegate user who created the record.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
exchangerate	Decimal	Exchange rate for the currency associated with the entity with respect to the base currency.
importsequencenumber	Integer	Sequence number of the import that created this record.
modifiedby	Lookup	Unique identifier of the user who modified the record.
modifiedbyname	String	N/A
modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Unique identifier of the delegate user who modified the record.
modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msfsi_amount	Money	The amount contributed by the syndicate towards the client's loan.
msfsi_amount_base	Money	Value of the Amount in base currency.

msfsi_bankid	Lookup	Name of Bank
msfsi_bankidname	String	N/A
msfsi_contribution	Decimal	Percentage of the contribution of the syndicate.
msfsi_loanid	Lookup	Reference to the loan product for which the syndicates are defined.
msfsi_loanidname	String	N/A
msfsi_name	String	The name of the custom entity.
msfsi_syndicatesid	Uniqueidentifier	Unique identifier for entity instances
overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner
owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record
owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.
statecode	State	Status of the Syndicates
statecodename	Virtual	N/A
statuscode	Status	Reason for the status of the Syndicates
statuscodename	Virtual	N/A
timezoneruleversionnumber	Integer	For internal use only.
transactioncurrencyid	Lookup	Unique identifier of the currency associated with the entity.
transactioncurrencyidname	String	N/A
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number

Opportunity

An opportunity represents a qualified prospect or an existing customer's interest in a product of the bank. An opportunity is a potential deal, and is created when the prospect or an existing customer applies for the interested product. If the opportunity is won, then the interested product will be turned into a financial product tied to the customer who applied for it.

The following items can be linked with a Entity Name:
- Company
- Person
- Product
- Requested Facilities

Attributes

Logical Name	Type	Description
accountid	Lookup	Unique identifier of the account with which the opportunity is associated.
accountidname	String	N/A
accountidyominame	String	N/A
actualclosedate	DateTime	Shows the date and time when the opportunity was closed or canceled.
actualvalue	Money	Type the actual revenue amount for the opportunity for reporting and analysis of estimated versus actual sales. Field defaults to the Est. Revenue value when an opportunity is won.
actualvalue_base	Money	Value of the Actual Revenue in base currency.
budgetamount	Money	Type a value between 0 and 1,000,000,000,000 to indicate the lead's potential available budget.
budgetamount_base	Money	Value of the Budget Amount in base currency.
budgetstatus	Picklist	Select the likely budget status for the lead's company. This may help determine the lead rating or your sales approach.
budgettypename	Virtual	N/A

campaignid	Lookup	Shows the campaign that the opportunity was created from. The ID is used for tracking the success of the campaign.
campaignidname	String	N/A
captureproposalfeedback	Boolean	Choose whether the proposal feedback has been captured for the opportunity.
captureproposalfeedbackname	Virtual	N/A
closeprobability	Integer	Type a number from 0 to 100 that represents the likelihood of closing the opportunity. This can aid the sales team in their efforts to convert the opportunity in a sale.
completefinalproposal	Boolean	Select whether a final proposal has been completed for the opportunity.
completefinalproposalname	Virtual	N/A
completeinternalreview	Boolean	Select whether an internal review has been completed for this opportunity.
completeinternalreviewname	Virtual	N/A
confirminterest	Boolean	Select whether the lead confirmed interest in your offerings. This helps in determining the lead quality and the probability of it turning into an opportunity.
confirminterestname	Virtual	N/A
contactid	Lookup	Unique identifier of the contact associated with the opportunity.
contactidname	String	N/A
contactidyominame	String	N/A
createdby	Lookup	Shows who created the record.
createdbyname	String	N/A
createdbyyominame	String	N/A
createdon	DateTime	Date and time when the record was created.

createdonbehalfby	Lookup	Shows who created the record on behalf of another user.
createdonbehalfbyname	String	N/A
createdonbehalfbyyominame	String	N/A
currentsituation	Memo	Type notes about the company or organization associated with the opportunity.
customerid	Customer	Select the customer account or contact to provide a quick link to additional customer details, such as address, phone number, activities, and orders.
customeridname	String	N/A
customeridtype	EntityName	N/A
customeridyominame	String	N/A
customerneed	Memo	Type some notes about the customer's requirements, to help the sales team identify products and services that could meet their requirements.
customerpainpoints	Memo	Type notes about the customer's pain points to help the sales team identify products and services that could address these pain points.
decisionmaker	Boolean	Select whether your notes include information about who makes the purchase decisions at the lead's company.
decisionmakername	Virtual	N/A
description	Memo	Type additional information to describe the opportunity, such as possible products to sell or past purchases from the customer.
developproposal	Boolean	Select whether a proposal has been developed for the opportunity.
developproposalname	Virtual	N/A

discountamount	Money	Type the discount amount for the opportunity if the customer is eligible for special savings.
discountamount_base	Money	Value of the Opportunity Discount Amount in base currency.
discountpercentage	Decimal	Type the discount rate that should be applied to the Product Totals field to include additional savings for the customer in the opportunity.
emailaddress	String	The primary email address for the entity.
estimatedclosedate	DateTime	Enter the expected closing date of the opportunity to help make accurate revenue forecasts.
estimatedvalue	Money	Type the estimated revenue amount to indicate the potential sale or value of the opportunity for revenue forecasting. This field can be either system-populated or editable based on the selection in the Revenue field.
estimatedvalue_base	Money	Value of the Est. Revenue in base currency.
evaluatefit	Boolean	Select whether the fit between the lead's requirements and your offerings was evaluated.
evaluatefitname	Virtual	N/A
exchangerate	Decimal	Shows the conversion rate of the record's currency. The exchange rate is used to convert all money fields in the record from the local currency to the system's default currency.
filedebrief	Boolean	Choose whether the sales team has recorded detailed notes on the proposals and the account's responses.
filedebriefname	Virtual	N/A

finaldecisiondate	DateTime	Enter the date and time when the final decision of the opportunity was made.
freightamount	Money	Type the cost of freight or shipping for the products included in the opportunity for use in calculating the Total Amount field.
freightamount_base	Money	Value of the Freight Amount in base currency.
identifycompetitors	Boolean	Select whether information about competitors is included.
identifycompetitorsname	Virtual	N/A
identifycustomercontacts	Boolean	Select whether the customer contacts for this opportunity have been identified.
identifycustomercontactsname	Virtual	N/A
identifypursuitteam	Boolean	Choose whether you have recorded who will pursue the opportunity.
identifypursuitteamname	Virtual	N/A
importsequencenumber	Integer	Sequence number of the import that created this record.
initialcommunication	Picklist	Choose whether someone from the sales team contacted this lead earlier.
initialcommunicationname	Virtual	N/A
isprivate	Boolean	Indicates whether the opportunity is private or visible to the entire organization.
isprivatename	Virtual	N/A
isrevenuesystemcalculated	Boolean	Select whether the estimated revenue for the opportunity is calculated automatically based on the products entered or entered manually by a user.
isrevenuesystemcalculatedname	Virtual	N/A
lastonholdtime	DateTime	Contains the date time stamp of the last on hold time.
modifiedby	Lookup	Shows who last updated the record.

modifiedbyname	String	N/A
modifiedbyyominame	String	N/A
modifiedon	DateTime	Date and time when the record was modified.
modifiedonbehalfby	Lookup	Shows who last updated the record on behalf of another user.
modifiedonbehalfbyname	String	N/A
modifiedonbehalfbyyominame	String	N/A
msdyn_accountmanagerid	Lookup	The account manager responsible for the opportunity.
msdyn_accountmanageridname	String	N/A
msdyn_accountmanageridyominame	String	N/A
msdyn_contractorganizationalunitid	Lookup	The organizational unit in charge of the opportunity.
msdyn_contractorganizationalunitidname	String	N/A
msdyn_forecastcategory	Picklist	Categories used for forecasting.
msdyn_forecastcategoryname	Virtual	N/A
msdyn_gdproptout	Boolean	Describes whether opportunity is opted out or not
msdyn_gdproptoutname	Virtual	N/A
msdyn_opportunitygrade	Picklist	
msdyn_opportunitygradename	Virtual	N/A
msdyn_opportunitykpiid	Lookup	Maps to opportunity KPI records
msdyn_opportunitykpiidname	String	N/A
msdyn_opportunityscore	Integer	
msdyn_opportunityscoretrend	Picklist	
msdyn_opportunityscoretrendname	Virtual	N/A
msdyn_ordertype	Picklist	Internal use only.
msdyn_ordertypename	Virtual	N/A
msdyn_scorehistory	Memo	
msdyn_scorereasons	Memo	
msdyn_workordertype	Lookup	Unique identifier for Work Order Type associated with Opportunity.
msdyn_workordertypename	String	N/A
msfsi_costofproperty	Money	The price of the property for which customer is applying for the loan.

msfsi_costofproperty_base	Money	Value of the Cost of Property in base currency.
msfsi_downpayment	Money	The total down payment that customer has made against the car or property for which he is applying for the loan.
msfsi_downpayment_base	Money	Value of the Down Payment in base currency.
msfsi_interestrate	Decimal	The rate of interest applicable to the product. The applicable rate must be fetched from the product catalog based on the requested amount.
msfsi_preferredfollowuptime	Picklist	Convenient time for the customer to be contacted.
msfsi_preferredfollowuptimename	Virtual	N/A
msfsi_productid	Lookup	The product that the customer is applying for.
msfsi_productidname	String	N/A
msfsi_purposeofloan	String	The reason or purpose for which customer is applying for the loan.
msfsi_requestedamount	Money	The amount of the product that customer is applying for such as the loan amount or card limit.
msfsi_requestedamount_base	Money	Value of the Requested Amount in base currency.
msfsi_termofloan	Integer	The number of months that customer is requesting as term of the loan.
name	String	Type a subject or descriptive name, such as the expected order or company name, for the opportunity.
need	Picklist	Choose how high the level of need is for the lead's company.
needname	Virtual	N/A
new_churnscore	String	
new_creditscore	String	
new_monthlyincome	String	
new_testsolutionentityid	String	

onholdtime	Integer	Shows the duration in minutes for which the opportunity was on hold.
opportunityid	Uniqueidentifier	Unique identifier of the opportunity.
opportunityratingcode	Picklist	Select the expected value or priority of the opportunity based on revenue, customer status, or closing probability.
opportunityratingcodename	Virtual	N/A
originatingleadid	Lookup	Choose the lead that the opportunity was created from for reporting and analytics. The field is read-only after the opportunity is created and defaults to the correct lead when an opportunity is created from a converted lead.
originatingleadidname	String	N/A
originatingleadidyominame	String	N/A
overriddencreatedon	DateTime	Date and time that the record was migrated.
ownerid	Owner	Owner Id
owneridname	String	Name of the owner
owneridtype	EntityName	Owner Id Type
owneridyominame	String	Yomi name of the owner
owningbusinessunit	Lookup	Unique identifier for the business unit that owns the record
owningteam	Lookup	Unique identifier for the team that owns the record.
owninguser	Lookup	Unique identifier for the user that owns the record.
parentaccountid	Lookup	Choose an account to connect this opportunity to, so that the relationship is visible in reports and analytics, and to provide a quick link to additional details, such as financial information and activities.
parentaccountidname	String	N/A
parentaccountidyominame	String	N/A

parentcontactid	Lookup	Choose a contact to connect this opportunity to, so that the relationship is visible in reports and analytics.
parentcontactidname	String	N/A
parentcontactidyominame	String	N/A
participatesinworkflow	Boolean	Information about whether the opportunity participates in workflow rules.
participatesinworkflowname	Virtual	N/A
presentfinalproposal	Boolean	Select whether the final proposal has been presented to the account.
presentfinalproposalname	Virtual	N/A
presentproposal	Boolean	Select whether a proposal for the opportunity has been presented to the account.
presentproposalname	Virtual	N/A
pricelevelid	Lookup	Choose the price list associated with this record to make sure the products associated with the campaign are offered at the correct prices.
pricelevelidname	String	N/A
pricingerrorcode	Picklist	Pricing error for the opportunity.
pricingerrorcodename	Virtual	N/A
prioritycode	Picklist	Select the priority so that preferred customers or critical issues are handled quickly.
prioritycodename	Virtual	N/A
processid	Uniqueidentifier	Contains the id of the process associated with the entity.
proposedsolution	Memo	Type notes about the proposed solution for the opportunity.
purchaseprocess	Picklist	Choose whether an individual or a committee will be involved in the

		purchase process for the lead.
purchaseprocessname	Virtual	N/A
purchasetimeframe	Picklist	Choose how long the lead will likely take to make the purchase.
purchasetimeframename	Virtual	N/A
pursuitdecision	Boolean	Select whether the decision about pursuing the opportunity has been made.
pursuitdecisionname	Virtual	N/A
qualificationcomments	Memo	Type comments about the qualification or scoring of the lead.
quotecomments	Memo	Type comments about the quotes associated with the opportunity.
resolvefeedback	Boolean	Choose whether the proposal feedback has been captured and resolved for the opportunity.
resolvefeedbackname	Virtual	N/A
salesstage	Picklist	Select the sales stage of this opportunity to aid the sales team in their efforts to win this opportunity.
salesstagecode	Picklist	Select the sales process stage for the opportunity to indicate the probability of closing the opportunity.
salesstagecodename	Virtual	N/A
salesstagename	Virtual	N/A
schedulefollowup_prospect	DateTime	Enter the date and time of the prospecting follow-up meeting with the lead.
schedulefollowup_qualify	DateTime	Enter the date and time of the qualifying follow-up meeting with the lead.
scheduleproposalmeeting	DateTime	Enter the date and time of the proposal meeting for the opportunity.
sendthankyounote	Boolean	Select whether a thank you note has been sent to the account for considering the proposal.
sendthankyounotename	Virtual	N/A

skippricecalculation	Picklist	Skip Price Calculation (For Internal Use)
skippricecalculationname	Virtual	N/A
slaid	Lookup	Choose the service level agreement (SLA) that you want to apply to the opportunity record.
slainvokedid	Lookup	Last SLA that was applied to this opportunity. This field is for internal use only.
slainvokedidname	String	N/A
slaname	String	N/A
stageid	Uniqueidentifier	Contains the id of the stage where the entity is located.
statecode	State	Shows whether the opportunity is open, won, or lost. Won and lost opportunities are read-only and can't be edited until they are reactivated.
statecodename	Virtual	N/A
statuscode	Status	Select the opportunity's status.
statuscodename	Virtual	N/A
stepid	Uniqueidentifier	Shows the ID of the workflow step.
stepname	String	Shows the current phase in the sales pipeline for the opportunity. This is updated by a workflow.
teamsfollowed	Integer	Number of users or conversations followed the record
timeline	Picklist	Select when the opportunity is likely to be closed.
timelinename	Virtual	N/A
timespentbymeonemailandmeetings	String	Total time spent for emails (read and write) and meetings by me in relation to the opportunity record.
timezoneruleversionnumber	Integer	For internal use only.
totalamount	Money	Shows the total amount due, calculated as the sum of the products, discounts, freight, and taxes for the opportunity.

totalamount_base	Money	Value of the Total Amount in base currency.
totalamountlessfreight	Money	Shows the total product amount for the opportunity, minus any discounts. This value is added to freight and tax amounts in the calculation for the total amount of the opportunity.
totalamountlessfreight_base	Money	Value of the Total Pre-Freight Amount in base currency.
totaldiscountamount	Money	Shows the total discount amount, based on the discount price and rate entered on the opportunity.
totaldiscountamount_base	Money	Value of the Total Discount Amount in base currency.
totallineitemamount	Money	Shows the sum of all existing and write-in products included on the opportunity, based on the specified price list and quantities.
totallineitemamount_base	Money	Value of the Total Detail Amount in base currency.
totallineitemdiscountamount	Money	Shows the total of the Manual Discount amounts specified on all products included in the opportunity. This value is reflected in the Total Detail Amount field on the opportunity and is added to any discount amount or rate specified on the opportunity.
totallineitemdiscountamount_base	Money	Value of the Total Line Item Discount Amount in base currency.
totaltax	Money	Shows the total of the Tax amounts specified on all products included in the opportunity, included in the Total Amount field calculation for the opportunity.

totaltax_base	Money	Value of the Total Tax in base currency.
transactioncurrencyid	Lookup	Choose the local currency for the record to make sure budgets are reported in the correct currency.
transactioncurrencyidname	String	N/A
traversedpath	String	A comma separated list of string values representing the unique identifiers of stages in a Business Process Flow Instance in the order that they occur.
utcconversiontimezonecode	Integer	Time zone code that was in use when the record was created.
versionnumber	BigInt	Version Number