




This training resource was last updated on 09.03.25. This is a live training resource that will be updated regularly.


Terminology Glossary

Lux Term (Salesforce / ascend)	Description	Raiser's Edge Term
Affiliation	Describes the connection between an individual and an organization in Lux (found as a sub-tab on the Organization or Constituent Details tab), including positions held or official affiliations (e.g., Employee/Employer, Student/Educational Institution) and can be utilized during prospecting to better understand interests, relationships, etc.	Relationship
Assignments	Tracks University Advancement staff assigned to a given Household or Organization responsible for coordinating their relationship with UCR to maximize engagement and philanthropic strategies. The Assignment tab is a sub-tab of the Prospect Management tab on every Household/Organization record. Both past and current assignments are listed. For any assigned prospect, please contact the Primary Relationship Manager before substantive contact, engagement efforts, or solicitations.	Assigned Fundraisers
Briefing	The Briefings section is a sub-tab found within the Prospect Management tab for any Household/Organization record. Briefings contains a table of all briefings prepared for a given prospect and are used to generate prospect profiles and event briefings. The briefings include Constituent Highlights, UCR Affiliations, External Philanthropy, External Awards/Recognition, and Family information. These are manually maintained by PD and should be verified for accuracy before use.	Constituent Notes
Campaign	In Lux a Campaign is used to track marketing or fundraising efforts, including events, appeals, or donor engagement activities. A campaign is required to process any gift or pledge in the system and helps with reporting and ROI tracking. If you require a campaign for an upcoming fundraising activity, please submit a case to Annual Giving to request a campaign and giving page to be setup.	Campaign & Appeal
Campus Financial Contact	A text field found on Designations records in Lux with contact names for the department contact for each designation	UCRF Contact
Campus Oracle Fund ID	A text field found on Designations records in Lux which contains the campus fund number for the Designation. This is the fund to which current-use gifts and annual endowment payouts are deposited on the campus general ledger.	UCRFS Fund Number ID
Cases / Case Management	Requests for updates or assistance submitted in Lux. Cases are assigned to and worked on by other users to help fulfill the request. Case types can include Support Request, Report Assistance, Data Update Requests, and Prospect Research Request.	Does not exist in RE
Chatter	Communication tool that allows users to collaborate and communicate directly or in a group with other users in Lux. Chatter is found on every Constituent/Organization record, and on many other key objects throughout Lux and functions similar to Teams or Slack - you can "@" mention other Lux users. Chatter is for internal purposes only.	Does not exist in RE

Constituent 	In Lux, a Constituent refers to an individual that is contained within the database. Every individual has an dedicated Constituent record. These constituent records are leveraging the out-of-the box Salesforce "Contact" object. You can find any Constituent using the global search bar: as you type in a name you'll see autocomplete suggestions that appear below the search bar and constituents have a purple contact badge like seen to the left and the word "Constituent" underneath the individual's name. In Raiser's Edge a constituent record could refer to any organization or individual; in Lux this is specifically referring to individuals. You can also find Constituents using the Constituent tab in the main Lux navigation bar.	Constituent
Constituent Indicator	On a Constituent overview page, there is a Constituent Indicator box on the left sidebar which includes visual icon badges that correspond to various aspects of the Constituent's experience with UCR. You can hover over an icon to read the corresponding indicator. Indicators include: Alumni, Alumni-Degreed, Alumni-Extension, Alumni-Non Degreed, UCRAA Board Member, Current Student-Grad, Current Student-Undergrad, Current Donor, Lapsed Donor, LYBUNT Donor, SYBUNT Donor, Major Donor, Principal Donor, UCRF Trustee.	Does not exist in RE
Constituent Type	In Lux, this is a multi-select picklist with values that provide was to classify and group all Constituents (or individuals) within the database. Values include: Alumni-Degreed, Alumni-Non Degreed, Alumni-Extension, Student-Graduate Current, Student-Undergraduate Current, Student-Graduate Former, Student-Undergraduate Former, Parent-Current, Parent-Former, Faculty-Current, Faculty-Emeritus, Faculty-Former, Staff-Current, Staff-Emeritus, Staff-Former, Trustee-Current, Trustee-Former, UCRAA Board-Current, UCRAA Board-Former, and Friend. A given Constituent's type is found on the Constituent Overview page of the individual's record.	Constituent Codes
Contact Report	The documented engagement or outreach attempt made by a development officer or someone representing UCR. Report should document any significant interaction with the constituent. These are found on the Prospect Management tab of any Constituent or Organization record.	Action
Designation	In Raiser's Edge, a "Fund" represents a specific designation for which donations are made (e.g. John Doe Endowed Scholarship Fund, Athletic Director's Discretionary Fund). In Lux, designations are used for the same purpose, to identify the fund where a specific payment/pledge/gift will be allocated.	Fund
Designation Background	A text field on Designations records that outlines specifically the donor background for the Designation, when available, as outlined in the fund establishing document.	Fund Notes
Designation Beneficiary (Student Recipient, Chair Holder)	A constituent who has been awarded a donor-funded scholarship is called a Student Recipient. A constituent who has been named as a donor-funded endowed chair is called a Chair Holder. These will be documented as a Designation Beneficiary with the respective beneficiary type on the Beneficiaries Tab of the Designation record.	Fund Relationship (Fund Recipient, Chair Holder)

Designation Documents URL	This will be a URL link to gift documentation (e.g. gift agreement, fund agreement) within the University Advancement Shared Drive.	Does not exist in RE
Designation Endowment Financials	For endowment designations, entries will be made annually with the Endowment Market Value as of June 30 and will be located on the Endowment Financials tab within a Designation record.	Does not exist in RE
Designation ID	The specific Lux CRM Designation identifier that is utilized for gift processing, foundation accounting, and designation reporting.	Fund ID
Designation Name	Name of the Designation	Fund Name
Designation Notes	A text field on the Designation record page that outlines any additional notes for the designation that do not apply to the purpose or background of the designation.	Fund Annotation
Designation Purpose	A text field on the Designation record that outlines specifically the purpose and criteria of the designation from the fund establishing document.	Fund Notes
Designation Steward	Constituents who are deemed Fund Establishing Donor, Fund Report Recipient, Fund Manager, or for which the Designation is In Honor Of, will be documented as a Designation steward with the respective steward type on the Stewardship Tab of the Designation record.	Fund Relationship (Fund Establishing Donor, Fund Report Recipient, Fund Manager, or In Honor Of)
Early Cultivation or Late Cultivation (Stage of Readiness)	Once a DO has qualified a Constituent (household/organization) through a substantive contact report entry, the Constituent's Stage of Readiness will move to Early Cultivation. Once the Proposal/Opportunity automatically generated for that constituent has been updated to include an ask date, amount, and indicates a benefitting unit, the Stage of Readiness will move to Late Cultivation indicating a solicitation is planned.	Cultivation (Prospect Stage)
Files	A sub-tab of the Prospect Management tab for any Constituent / Organization / Household record that serves as a container for storing files related to the Constituent. This should be used sparingly as files take up a lot of storage space. Please contact Prospect Development or Gift Admin prior to uploading a file to ensure this is an appropriate place to store this information.	Attachments
Former Name	Any former name that is no longer in use by a Constituent in Lux. There is no specific indicator for Maiden Names in Lux, so those would be captured under Former Name, as would any other prior names used by the constituent.	Maiden Name
Funding Interest	Funding Interest is a sub-tab of the Constituent/Organization Details page on any constituent, household, or organization. These are used to track demonstrated philanthropic interests and are predominantly populated using 3rd party vendor information based on the prospect's external giving (Standard Funding Interest). In addition to the standard type, there are UCR Funding Interests which directly tie to UCR specific priorities as identified through proactive research or communicated by the prospect to a DO/staff member. On the Unit Work Plan, UCR Funding Interests can be tied to a particular unit to indicate the annual priorities which helps with prospect identification.	Does not exist in RE

Giving Society	Membership status in the Bell Tower Society, Tartan Society, Highlander Society, 1907 Society, and Athletics Association will be tracked via the Giving Society object. Memberships in these societies use rule sets to determine the level of membership and update on an automated schedule. These can be found as a sub-tab of the Constituent or Organization Detail page on any constituent, household, or organization.	Membership (Giving Recognition Society)
Hard & Soft Credit	In Lux, every gift transaction that is processed automatically generates an explicit Hard Credit record to the last legal entity to possess the gift prior to transferring to UCR. Additionally, gifts can include Soft Credit records to indicate an entity's influence or involvement in making the gift, though they won't receive legal hard/tax credit. This often includes Spouses which can be setup to automatically receive Soft Credit.	Hard & Soft Credit
Household	Two or more Constituent records which have been grouped together in a single Household account. These are using out-of-the-box Salesforce "Account" objects and are a type of Organization record, meaning that Households will be found on the Organization tab. Within a Household important information belonging to each individual Constituent (contact reports, giving history, etc.) is stored in one place. Households typically represent Spouses. In Lux we are using Households as the primary "prospect" entity, so proposals and prospect assignments among other items are maintained at the Household level.	Constituent Relation
HOUSEHOLD Proposal (Opportunity) Stage - Ask Made	The DO has documented the official ask date, amount, benefitting unit and anticipated funding date. A solicitation has been made to the prospect.	Opportunity (Proposal) Stage - Ask Made/Response Pending
HOUSEHOLD Proposal (Opportunity) Stage - Declined	The constituent has declined the ask; this is a sub-stage of "Closed"	Opportunity (Proposal) Stage - Ask Declined
HOUSEHOLD Proposal (Opportunity) Stage - Draft	This is the automatic stage of an opportunity/proposal that was created when the stage of readiness changed from either Qualification or moved from Stewardship back to Early Cultivation. This is also the first stage if a DO is creating a proposal manually and is used to begin planning towards a solicitation.	Does not exist in RE
HOUSEHOLD Proposal (Opportunity) Stage - Funded	Gift Administration has marked the opportunity as funded upon receipt and entry of gift and necessary documentation into the system; this is a sub-stage of "Closed"	Opportunity (Proposal) Stage - Ask Funded
HOUSEHOLD Proposal (Opportunity) Stage - Planned	A gift/pledge type, planned ask date, amount and benefitting unit has been identified which will move the proposal from stage Draft to Planned automatically.	Opportunity (Proposal) Stage - Planning to Solicit
HOUSEHOLD Proposal (Opportunity) Stage - Withdrawn	The opportunity/proposal was discontinued to reasons relating to UCR instead of the constituent; this is a sub-stage of "Closed"	Opportunity (Proposal) Stage - Proposal Discontinued
Involvement	In Lux, Involvements tracks any ways in which a given Constituent has engaged with UCR and covers a wide range of activities including Alumni Network involvement, UCR Associations, board committees, Greek life, Awards & Honors, Media Features, Sports Teams, Student Activities, and Volunteer activities. You can see a list of a given record's involvements as a sub-tab of the Constituent or Organization Details tab on any constituent, household, or organization.	Attribute / Custom Fields
Knowtify	This displays an alert on the Constituent or Organization overview page containing critical or sensitive information contained about the given constituent or organization record.	Annotation

Match Companion Designation	A field on the Designation record details page. In instances where a UC Riverside Foundation Fund has a UC Regents Matching Fund (example: Presidential Match Challenge, Student Success Match Challenge), or vice versa, this new field will link directly to the companion Fund for convenience.	Does not exist in RE
Membership	Memberships that must be purchased at one time such as for 1954 Society and Friends of the Botanic Gardens will be tracked as memberships.	Membership (Purchased Membership)
Names	In Lux, Constituent and Organizations records have a "Names" sub-tab within the Details tab of their record pages. All current and former names are tracked here. Unlike RE which had only Name and Alias, the Lux Names object has a variety of name types for specificity including: Alias, Directory, Former, Full Name, and Nickname.	Name / Alias
Notes	There is a notes sub-tab under Prospect Management tab on Constituent, Household, and Organization records. This can be used to store miscellaneous information about the record that does not have a dedicated place elsewhere. However, this should be used VERY sparingly. Before creating a new note, please contact Prospect Development or Gift Administration to review.	Notes
Opportunity	Within Lux, Opportunity is an out-of-the-box Salesforce object type. Ascend has created a variety of Opportunity record types to track both proposals and gifts. When viewing an opportunity, you can reference the Opportunity Record Type field on the left sidebar to confirm the type. Values include: Household Proposal, Organization Proposal, Gift, Recurring Gift, Pledge, Matching Gift, One-Time Membership, Auto Renewing Membership. Depending on the record type, the fields and layout of the page will be different.	Does not exist in RE
Opportunity Stage (Gifts/Pledges - NOT proposal)	In Lux, the Opportunity Stages track the status of a given opportunity (e.g., Gift/Pledge). Stages include Paid, Funded, Cancelled, Adjusted, Active, Written Off, etc. For questions about a specific opportunity's stage please contact Gift Administration.	Gift Status
Organization 	In Lux, an Organization refers to a non-individual record (e.g., Company, Foundation, Household) that is contained within the database. Every Household or Organization has an dedicated Organization record. These organization records are leveraging the out-of-the box Salesforce "Account" object. You can find any Organization using the global search bar: as you type in a name you'll see autocomplete suggestions that appear below the search bar and organizations have a blue account badge like seen to the left and the word "Organization" underneath the entity's name. In Raiser's Edge an organization is tracked as a constituent record; in Lux an Organization is specifically referring to non-individual entities whereas Constituent is referring to individuals. You can also find Organizations using the Organizations tab in the main Lux navigation bar. Note: Households are a type of Organization record containing two or more individuals grouped into a household Organization entity.	Constituent
ORGANIZATION Proposal (Opportunity) Stage - Discontinued	Proposals with stage Discontinued are cancelled/withdrawn proposals no longer active. These proposals require a substage selected from the following options: No Campus Interest, PI Decision, or Campus Policy/Procedure	Opportunity (Proposal) Stage - Proposal Discontinued

ORGANIZATION Proposal (Opportunity) Stage - Lost	Proposals with stage Lost were not successfully funded by the organization for some reason. A proposal of Lost stage requires a substage selected from the following options: No Response, Declined.	
ORGANIZATION Proposal (Opportunity) Stage - Negotiation	This stage refers to a proposal where a solicitation has been made, a response has been received and there may be communication back and forth between UCR and the organization to negotiate final outcome.	Opportunity (Proposal) Stage - Ask Made/Response Pending
ORGANIZATION Proposal (Opportunity) Stage - Planned	This proposal stage indicates that there is a planned solicitation in progress. This stage requires a substage selected from the following options: Internal Approvals, LOI in Progress or Proposal in Progress	Opportunity (Proposal) Stage - Planning to Solicit
ORGANIZATION Proposal (Opportunity) Stage - Referral	The Organization Proposal Stage of Referral is similar to the Household Proposal stage of Draft. Referral is the starting point of an orgazational opportunity/proposal.	Opportunity (Proposal) Stage - Planning to Solicit
ORGANIZATION Proposal (Opportunity) Stage - Submitted	The Submitted stage indicates that a proposal of some kind has been submitted to the organization for their review/response. This stage requires a substage selected from the following options: LOI Submitted or Proposal Submitted	Opportunity (Proposal) Stage - Ask Made/Response Pending
ORGANIZATION Proposal (Opportunity) Stage - Won	Gift Administration has marked the opportunity as funded upon receipt and entry of gift and necessary documentation into the system. The proposal has been successfully funded at some amount.	Opportunity (Proposal) Stage - Ask Funded
Outright Gift	A one-time donation made by an individual or organization.	Cash Gift
Phones	Lux breaks each phone type out into one to one relationship record on the Phones sub-tab found on the Constituent or Organization Details tab. There will be one phone record for each phone type (e.g., Home, Business, Mobile, Fax). There are status indicators to determine if a particular phone number is active, preferred, suspect, or invalid.	Phones
Pledge (Opportunity)	In Lux, a Pledge is a record type of the Opportunity object, with custom fields to track pledge amounts, installment schedules, and payment due dates.	Pledge
Preferred Address	The address (regardless of type e.g. Home, Business, or Seasonal) marked as preferred in Lux will be the address used for mailings.	Preferred Address
Primary Relationship Manager	The Development Officer who has the strongest connection to the constituent	Relationship Coordinator
Pronouns	The field allows constituents to select from a predefined list of pronouns or enter a custom value, enabling them to express their gender identity in accordance with UCOP guidance re: the Gender Recognition/Lived Name policy.	Pronouns
Proposal (Opportunity)	A proposal refers to an opportunity record used to track planned and active solicitations with household and organization records.	Opportunity (Proposal)
Proposal Manager / Proposal Team Member	At the Proposal (Opportunity) level, users can configure the Proposal Team. By default the assigned Primary Relationship Manager will be added as the Proposal Manager, but this can be manually changed. Others involved in the solicitation can be added as a Proposal Team Member. When a gift is received and the proposal is marked as Funded, any users that are added to the proposal team will receive credit for the funded proposal.	Solicitor
Recognition Name	Found on the Constituent Overview page, the recognition name refers to how a donor or individual is acknowledged publicly, such as in a donor listing, gift naming, or annual report.	Recognition Name
Related Lists	The relationships between records. They allow users to view records that are linked to the currently viewed record on the same page. Related lists can be customized to include desired fields and the order for which they appear.	Constituent Relationship to a fund, any UCR Involvement in Consituent Attribute, Action with UCR through different channels

Related Organizations	This describes various business and structural relationships between organizations, including vendor partnerships, parent-subsidiary hierarchies, client associations, and corporate acquisitions.	Relationship (Organization to Organization)
Relationship	A Lux custom object that ties a Constituent to another Constituent record. This object is used to store spousal relationships, which generate Salutation records and update fields on the Constituents Overview. This object is also used for all other individual to individual Relationship Types (i.e. Sibling, Aunt/Uncle, etc.)	Relationship (Constituent to Constituent)
Salutations	Lux implements name formats as "salutations", with type, inside salutation, and addressee line fields to assist with mailings and communications. Find them as a sub-tab of the Constituent Details Tab. By default there is a Formal and Informal UCR Standard salutation generated using custom logic for every constituent (as well as a version for joint salutations if a spousal record exists). It is possible to add custom salutations for constituents that have specific preferences by making a request to Gift Administration.	Primary Addressee
Secondary Relationship Manager	A secondary staff member that assists in managing that prospect's relationship and engagement with UCR. In addition to Secondary Relationship Manager, there are additional specific assignment types in Lux that did not exist in RE. These are intended to provide greater clarity in the assignment team's roles with the given prospect, including: Gift Planning Consultant, Principal Giving Consultant, CFR Consultant, and Board Liaison	Secondary Relationship Coordinator
Service Indicators	Where a constituent has expressed opt-in/opt-out preferences of engagement types, no contact, no solicitation, etc.	Solicit Codes
Sessions	Sessions are how gifts are processed in Lux by Gift Administration. Creating a session then allows Gift Administration to enter many gifts in a row and then process them all at once.	Batch
Social Media	In Raiser's Edge, "Links" were considered phone types - in Lux, there is a Social Media section on the Constituent/Organization Details tab where social media handles are stored.	Links
Stage of Readiness	The development pipeline point (stage) that the constituent (household) is at (formerly known as the Prospect Stage which includes qualification, cultivation, solicitation, and stewardship.)	Prospect Stage
Stage of Readiness	The prospect moves management stages that track where on the development pipeline a given prospect is at. Values include: Identification, Qualification, Early Cultivation, Late Cultivation, Solicitation, Stewardship, Permanent Stewardship, Temporary Disqualification, and Permanent Disqualification.	Action (also) as it relates to Prospect Stages
Strategies / Strategy	In Lux, a dedicated section within the Prospect Management tab for every Household and Organization where the Primary Relationship Manager works in conjunction with secondary assignment and proposal team members to document and track the overall prospect strategy will be for qualification, cultivation, solicitation, or stewardship, for a given Household or Organization.	Action (as it relates to Strategy Plans)

Task	An action or task/to do item assigned to users in Lux. Users can assign tasks to themselves and to other users. Users can manage tasks from their homepage which shows all open tasks under "My Tasks and Cases" tab. You can also search for the Tasks object in the App Launcher for a more robust task management view. Utilizing tasks helps all users maintain a 360-view of engagement that is ongoing with a given organization or constituent, as well as providing users a convenient way to manage workload.	Does not exist in RE
Tender Type	In Lux, the method of payment for gifts (ACH/Wire, Cash, Check, etc.) is tracked as the Tender Type on the gift Opportunity record. In Raiser's Edge this was tracked using a gift type categorization.	Gift Type
Tributes	In Lux, Tributes are a stand alone object allowing all In Memory of / In Honor of recognition to be tracked. Tributes are connected to the constituent or organization that made the tribute, the constituent that is being recognized by the tribute, the constituent that should be notified of the tribute, and the pledge/gift that generated the tribute. There is also a mechanism on the tribute record to track that a notification was sent.	Honor/Memorial
Work Plan	Each development officer and unit have a work plan developed on a fiscal year basis to track specified metrics/goals, top prospects to be cultivated or solicited, and particular funding priorities. This provides a transparent way to document annual performance goals, and is used to help track and measure against these work plan goals as activities (e.g., contact reports, proposals, qualification efforts, etc.) take place in Lux.	Does not exist in RE