Financial Services Cloud Developer Guide

Salesforce, Summer '18

'18

CONTENTS

Contents

FINANCIAL SERVICES CLOUD DEVELOPER GUIDE

Use the fields, objects, and metadata that extend Salesforce for Financial Services Cloud. Apex trigger information is also provided.

Fields and objects in the package have the `FinServ` namespace prefix. For example, `FinServ__IndividualId__c` is a custom field on Account. `FinServ__FinancialAccount__c` is a custom object. To refer to the standard Salesforce objects, see the *Object Reference for Salesforce*.

> 📝 **Note:** The API version for objects included in the Financial Services Cloud packages is one version behind core Salesforce. For example, if your org's API version is 40, the packaged Financial Services Cloud elements including custom objects, components, classes, and triggers are API version 39.

FINANCIAL SERVICES CLOUD STANDARD AND CUSTOM OBJECTS

Account Custom Fields

Represents information about an individual that pertains to their dealings with your firm, such as their review frequency or service tier. Custom fields extend the standard Account object for use in Financial Services Cloud.

Fields

Field Name	Details
AUM__c	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of this individual's financial accounts that your firm manages. Calculated as the sum of `TotalAUMPrimaryOwner__c` and `TotalAUMJointOwner__c`.
BankNumber__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies a financial institution for electronic purposes.
BorrowingHistory__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Rating of this individual's borrowing history. Valid values: • Excellent • Moderate • Poor • Limited to No History

Field Name	Details
BorrowingPriorities__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Primary goal for loan application. Valid values: • Build Equity • Debt Consolidation • Education • Investments • Large Capital Purchases • Property Purchase • Renovations
BranchCode__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies an office or building of a financial institution. Code format is based on the financial institution. Record type for this account. The value is copied from `RecordType.Name` and can't be changed.
BranchName__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Location name for a financial institution office. Record type for this account. The value is copied from `RecordType.Name` and can't be changed.
ClientCategory__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Rates the value of this individual's business with your firm. Label is `Category`. Valid values:

Field Name	Details
	• Platinum
	• Gold
	• Silver
	• Bronze
	• Investments

Field Name	Details
CreditRating__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Assessment of creditworthiness. Valid values: • Excellent • Good • Fair • Poor
CreditScore__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Numerical rating of borrower's creditworthiness.
CustomerID__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial institution's identification number for this individual (80 characters) Record type for this account. The value is copied from `RecordType.Name` and can't be changed.
CustomerSegment__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Individual's market segment. Valid values:

Field Name	Details
	• Borrower • Long-Term Growth • Mass Affluent • Mass Market • Millennial • Transactional • Wealth Accumulation

Field Name	Details
CustomerType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual's financial category. Valid values: • Borrower • Investor • Relational • Transaction
FinancialInterests__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** This individual's financial areas of interest. Valid values: • Municipal Bonds • Fixed Income • Energy • Technology • CRM • AAPL • GOOG • Retirement • College Planning
IndividualId__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description
	Read only. Unique ID that relates this individual's account record to its contact record.

Field Name	Details
IndividualType__c	**Type**
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Type of individual. Valid values:

- Individual
- Group
- (Blank) - If this value is blank, then the Individual Type is Business.

> 📝 **Note:** This field is for Salesforce internal-use only. This field can't be changed.

Field Name	Details
InvestmentExperience__c	**Type**
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	This individual's investment experience. Valid values:

- Experienced
- Moderately Experienced
- Moderately Inexperienced
- Inexperienced

Field Name	Details
InvestmentObjectives__c	**Type**
	multipicklist
	Properties
	Create, Filter, Nillable, Update
	Description
	This individual's preference for growth versus income investments. Valid values:

- Conservative Income
- Income
- Balanced
- Growth
- Aggressive Growth

Field Name	Details
KYCDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the Know Your Customer compliance program was completed for this individual.
LastInteraction__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last meeting or call.
LastReview__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last review.
LastTransactionDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last transaction.
LastTransactionDateJointOwner__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last transaction - joint owner.
LastTransactionDatePrimaryOwner__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Date of the last transaction - primary owner.
LastUsedChannel__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Most recent contact channel. Valid values: • Branch • Call Center • Mobile • Web • Other
LengthOfRelationship__c	**Type** double **Properties** Filter, Nillable, Sort **Description** Individual's tenure with the financial institution.
LifetimeValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Individual's lifetime net asset value to your financial institution.
MarketingSegment__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Market segments that characterize this individual. Valid values: • Mass Affluent • High Net Worth • Female Investor • Millennial

Field Name	Details
NetWorth__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Value of this individual's assets minus liabilities.
NextInteraction__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the next meeting or call.
NextReview__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the next review.
Notes__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Important notes about the individual. Label is `Important Notes`.
PersonalInterests__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Personal areas of interest. Valid values: • Cooking • College Basketball • Environment • Hiking • Biking • Wine

Field Name	Details
PrimaryContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Read only. ID of the contact record associated with this individual's account record.
RecordTypeName__c	**Type** string **Properties** Filter, Nillable, Sort **Description** Record type for this account. The value is copied from `RecordType.Name` and can't be changed.
ReferredByContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact referring this individual.
ReferredByUser__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Internal Salesforce user who made the referral.
RelationshipStartDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date this individual started working with your company.
ReviewFrequency__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Frequency of reviews. Valid values: • Monthly • Quarterly • Annually
RiskTolerance__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Level of risk this individual is comfortable with. Valid values: • Aggressive • Conservative • Moderate • None
ServiceModel__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Service level assigned to this individual. Valid values: • Tier 1 • Tier 2 • Tier 3
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies this individual in an external data source.
Status__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual's status with your firm. Valid values:

Field Name	Details
	• Active
	• Closed
	• Deceased
	• Delinquent
	• Dormant
	• Inactive
	• Onboarding
	• Prospect
`TimeHorizon__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual's investment time frame. Valid values: • Long Term • Medium Term • Short Term
`TotalAUMJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of financial accounts that your company manages, for which this individual is the joint owner of jointly owned accounts.
`TotalAUMPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of financial accounts that your company manages, for which this individual is the primary owner of either separately owned or jointly owned accounts.
`TotalBankDeposits__c`	**Type** currency **Properties** Filter, Nillable, Sort

Field Name	Details
	Description Value of this individual's accounts. Calculated as the sum of `TotalBankDepositsPrimaryOwner__c` and `TotalBankDepositsJointOwner__c`.
`TotalBankDepositsJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of accounts, for which this individual is the joint owner of jointly owned accounts.
`TotalBankDepositsPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of accounts, for which this individual is the primary owner of either separately owned or jointly owned accounts.
`TotalFinAcctsJointOwner__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of financial account balances (excluding insurance policies), for which this individual is the joint owner of jointly owned accounts. Label is `Total Financial Accounts Joint Owner`.
`TotalFinAcctsPrimaryOwner__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of financial account balances (excluding insurance policies), for which this individual is the primary owner of either separatley owned or jointly owned accounts. Label is `Total Financial Accounts Primary Owner`.
`TotalFinancialAccounts__c`	**Type** currency

Field Name	Details
	Properties Filter, Nillable, Sort **Description** Value of all financial accounts, excluding insurance policies. Calculated as the sum of `TotalBankDeposits__c` and `TotalInvestments__c`.
`TotalHeldFinAcctsJointOwner__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of held financial account balances, for which this individual is the joint owner of jointly owned accounts. Label is `Total Held Financial Accounts Joint`.
`TotalHeldFinAcctsPrimaryOwner__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total value of held financial account balances, for which this individual is the primary owner of either separately owned or jointly owned accounts. Label is `Total Held Financial Accounts Primary`.
`TotalInsurance__c`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of this individual's insurance policies. Calculated as the sum of `TotalInsurancePrimaryOwner__c` and `TotalInsuranceJointOwner__c`.
`TotalInsuranceJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of insurance policies, for which the individual is the joint owner of jointly owned accounts.

Field Name	Details
TotalInsurancePrimaryOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of insurance policies, for which the individual is the primary owner of either separately owned or jointly owned accounts.
TotalInvestments__c	**Type** currency **Properties** Filter, Nillable, Sort **Description** Value of investment accounts. Calculated as the sum of `TotalInvestmentsPrimaryOwner__c` and `TotalInvestmentsJointOwner__c`.
TotalInvestmentsJointOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of investment accounts, for which the individual is the joint owner of jointly owned accounts.
TotalInvestmentsPrimaryOwner__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of investment accounts, for which the individual is the primary owner of either separately owned or jointly owned accounts.
TotalLiabilities__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Value of individual's liabilities, stored as a negative value. Calculated as the sum of `TotalLiabilitiesPrimaryOwner__c` and `TotalLiabilitiesJointOwner__c`.

Field Name	Details
`TotalLiabilitiesJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of liabilities, for which this individual is the joint owner of jointly owned liabilities.
`TotalLiabilitiesPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of liabilities, for which this individual is the primary owner of either separately owned or jointly owned liabilities.
`TotalNonfinancialAssets__c`	**Type** double **Properties** Filter, Nillable, Sort **Description** Value of tangible assets such as collectibles or precious metals. Calculated as the sum of `TotalNonfinancialAssetsPrimaryOwner__c` and `TotalNonfinancialAssetsJointOwner__c`.
`TotalNonfinancialAssetsJointOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of tangible assets such as collectibles or precious metals, for which this individual is the joint owner of jointly owned assets.
`TotalNonfinancialAssetsPrimaryOwner__c`	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Total value of tangible assets such as collectibles or precious metals, for which this individual is the primary owner of either separately owned or jointly owned assets.

Field Name	Details
TotalPremium__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Policyholder's total annual premium.
WalletShare__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Read only. Percentage of this individual's financial assets that your company manages or administers. Calculated as the percent of financial accounts that are held (`FinancialAccount__c.HeldAway` is false).

AccountAccountRelation

Represents a relationship between two accounts, such as between a household and a business account.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Account__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account that `RelatedAccount__c` is related from.
Active__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the relationship is active (`true`) or not (`false`). The default value is `true`.
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
EndDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship ended.
ExternalId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.
InverseRelationship__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Uniquely identifies the relationship between `Account` and `RelatedAccount__c` so that it can be referenced by a trigger that creates the inverse relationship record.
Name	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Auto-number identifier for the relationship. Label is `Account Relation Name`.
OwnerId	**Type** reference

Field	Details
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	ID of the user who created the relationship record.
`RelatedAccount__c`	**Type**
	reference
	Properties
	Filter, Group, Nillable, Sort
	Description
	Account that `Account__c` is related to.
`Role__c`	**Type**
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Role that describes how `RelatedAccount__c` is related to `Account__c`.
`SourceSystemId__c`	**Type**
	string
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	ID that uniquely identifies the relationship in an external data source.
`StartDate__c`	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date when the relationship started.

AccountContactRelation Standard and Custom Fields

Represents the relationship between an individual (specifically the contact part of the individual) and the household (account) that the individual is a member of. AccountContactRelation is a standard object that is available through the Shared Contacts feature. Custom fields extend the AccountContactRelation standard object for use in Financial Services Cloud.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), update(), upsert()`

Fields

Field	Details
AccountId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the household (account) that the individual is a member of.
ContactId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the contact that partially represents the individual.
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
EndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the individual's status as a household member is no longer in effect.
IncludeInGroup__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Includes this account in a related individual's primary group.

Field	Details
IsActive	**Type** boolean **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Indicates whether the individual's status as a household member is in effect (`true`) or not (`false`). Label is `Active`.
IsDirect	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the account-to-contact relationship is direct, which means that it relates the account and contact parts of an individual to represent a single individual (`true`). Otherwise, the relationship is indirect, which means that it relates the contact part of an individual to the household the individual belongs to (`false`). Label is `Direct`.
Primary__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates the primary member of a group (`true`) or not (`false`).
PrimaryGroup__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates a person's primary group. You can roll up summary fields only to a person's primary group if `PrimaryGroup__c` is set to `true`.
Roles	**Type** picklist **Properties** Create, Filter, Nillable, Update **Description** Role that the individual plays within the household. Valid values: • Influencer • Evaluator • Business User

Field	Details
	• Technical Buyer
	• Economic Buyer
	• Other
	• Decision Maker
	• Economic Decision Maker
	• Executive Sponsor
	✏ **Note:** Replace these default picklist values with appropriate values for the roles that clients occupy within households, such as client, spouse, domestic partner, and dependent.
Rollups__c	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Records associated with the individual that are included in household roll-up summaries. Valid values: • All • Tasks • Events • Financial Accounts • Assets and Liabilities • Financial Goals
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.
StartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the individual's status as a household member took effect.

Alert

Represents notifications to alert advisors about their client accounts.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Account__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A lookup field to an account that alerts are related to.
Active__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether an alert is active.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The financial account that alerts are related to.
Message__c	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The main content of an alert.
MessageDescription__c	**Type** string

Field	Details

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

An optional description for the main content of an alert as specified in the `Message__c` field. This text appears below the main content.

Priority__c

Type

picklist

Properties

Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

An indication of the urgency of an alert. Valid values:

- High
- Low
- Medium

Severity__c

Type

picklist

Properties

Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update

Description

The type of alert. Valid values:

- Error
- Info
- Warning

SourceSystemId__c

Type

string

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

The ID of a record from the external system that triggered the alert.

AssetsAndLiabilities

Represents assets or liabilities that are not represented in a client's financial accounts, such as real estate or collectibles.

Supported Calls

```
create(),delete(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),
retrieve(),search(),undelete(),update(),upsert()
```

Fields

Field	Details
Amount__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount of an asset (positive) or liability (negative).
AssetsAndLiabilitiesSource__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Data source. Label is `Source`. Valid values: • Manual Entry • Yodlee
AssetsAndLiabilitiesType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of asset or liability. Label is `Type`. Valid values: • Auto Loan • Mortgage • Other • Personal Loan • Real Estate • Equipment • Automobile • Collection • Gold • Jewelry • Cash

25

Field	Details
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
Description__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of this asset or liability.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial account that this asset or liability is related to.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this asset or liability is associated with.
JointOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Joint owner, if any, for this asset or liability.
LastReferencedDate	**Type** date **Properties** Filter, Nillable, Sort, **Description** Timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this asset or liability.
OwnerId	**Type** reference **Properties** Create, Defaulted on createFilter, Group, Sort, Update **Description** ID of the user who created the asset or liability record.
Ownership__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of ownership for this asset or liability. Valid values: • Individual • Joint • Trust
OwnerType__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client's ownership role (primary or joint) for this asset or liability. The value is specified by a trigger.
PrimaryOwner__c	**Type** reference

27

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Primary owner of this asset or liability.
RecordTypeId	**Type** reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the record type associated with this asset or liability.
SourceSystemId__c	**Type** string
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description ID that uniquely identifies the asset or liability in an external data source.

BillingStatement

Represents a billing statement for an individual's financial account.

Supported Calls

create(), delete(), describeLayout(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()

Fields

Field	Details
BalanceTransfers__c	**Type** currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Balance transfer details.

Field	Details
BillingPeriodEnd__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Billing period end date.
BillingPeriodStart__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Billing period start date.
CashAdvances__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash advance amount for the billing period.
Deposits__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Deposit made to the account during the billing period.
EndingBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Balance due on the account during the billing period.
FeesCharged__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee charged during the billing period.

Field	Details
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Financial account associated with this billing statement.
InterestThisPeriod__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest charged on the account during the billing period.
InterestYTD__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest charged year to date.
LastPaymentDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last payment made on the account.
MinimumPaymentDue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Minimum payment required by the due date.
OtherCredits__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Other credits made during the billing period.

Field	Details
PastDueAmount__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount past due as of the statement date.
PaymentDueDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date a payment is due.
Payments__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Payment received since the last statement.
PreviousBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Account balance at the end of the previous billing period.
Purchases__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total purchases made during the current billing period.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.

Field	Details
StatementDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the current statement was generated.
Withdrawals__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash withdrawal made during the billing period.

Card

Represents credit or debit card associated with this financial account.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AccountHolder__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual credit or debit holder associated with this card.
Active__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the account is active (`true`) or inactive (`false`). Default is `true`.

Field	Details
BinNumber__c	**Type** double **Properties** CreateFilter, Nillable, SortUpdate **Description** Bank Identification number for this account.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial account associated with this card.
OwnershipType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of ownership for this card. Valid values: • Primary • Authorized • Other
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the financial account in an external data source.
ValidUntil__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date card is no longer valid.

ChargesAndFees

Represents agreed-to fees and charges for servicing an individual's financial account.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
AnnualAccountCharge__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual fee for maintaining an account.
AnnualMembershipFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual fee for credit card membership.
APR__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual percentage rate.
APRType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Annual percentage rate type. Valid values: • Fixed • Other • Variable

Field	Details
ATMFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** ATM fee.
BalanceTransferAPR__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** APR for balance transfers.
CashAdvanceFee__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Fee for withdrawing cash from a credit card account.
CashAPR__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual percentage rate applied to cash withdrawals.
CashAPRType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** APR applied to cash borrowed from a credit card account. Valid values: • Fixed • Other • Variable
ForeignTransactionFee__c	**Type** currency

Field	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Fee for making a credit card purchase in a foreign currency.
InsufficientFundsFee__c	**Type**
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Fee for attempting to make a purchase or payment from an account with insufficient funds.
InterestRate__c	**Type**
	percent
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Interest rate on a loan account (APR%).
LatePaymentFee__c	**Type**
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Fee for not paying the minimum payment by the due date.
MaximumTransactionFee__c	**Type**
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Fee for exceeding the maximum monthly transaction limit.
MonthlyServiceFee__c	**Type**
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Monthly account maintenance charge.
OverdraftFees__c	**Type**
	currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update
	Description Fee for a withdrawal that exceeds the available balance.
ReplacementCardFee__c	**Type** currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Fee for debit or credit card replacement.
ReturnedCheckFee__c	**Type** currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Fee for writing or receiving a check returned due to insufficient funds.
SourceSystemId__c	**Type** string
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description ID that uniquely identifies the individual in an external data source.
StatementFee__c	**Type** currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Fee for mailing an account statement.
StopPaymentFee__c	**Type** currency
	Properties Create, Filter, Nillable, Sort, Update
	Description Fee for requesting a stop payment on a check or payment that hasn't been processed yet.

Contact Custom Fields

Represents information about an individual that pertains to their personhood, irrespective of their relationship with your firm, such as their birthdate or tax ID number. Custom fields extend the Contact object for use in Financial Services Cloud.

Fields

Field Name	Details
Affiliations__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Memberships in clubs, organizations, and alumni associations.
Age__c	**Type** double **Properties** Filter, Nillable, Sort **Description** Age. Calculated from `Contact.Birthdate`.
AgeAsText__c	**Type** string **Properties** Filter, Nillable, Sort **Description** Age expressed in years, months, and days. Calculated from `Contact.Birthdate`. Label is **Age Text**.
AnnualIncome__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual income.
BillingAddress__c	**Type** string **Properties** Filter, Nillable, Sort

Field Name	Details
	Description The compound form of the billing address. Based on these address fields: `Account.BillingStreet`, `Account.BillingCity`, `Account.BillingState`, `Account.BillingPostalCode`, and `Account.BillingCountry`.
`Citizenship__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Citizenship.
`CommunicationPreferences__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Preferred communication channel. Valid values: • Balance Activities:Email • Balance Activities:Phone • Balance Activities:SMS • Fraud:Email • Fraud:Phone • Fraud:SMS • Promotions:Email • Promotions:Phone • Promotions:SMS
`ContactPreference__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Preferred communication method. Valid values: • Email • Mobile • Phone

39

Field Name	Details
CountryOfBirth__c	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** This individual's country of birth. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba • Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin • Bermuda • Bhutan • Bolivia, Plurinational State of • Bonaire, Sint Eustatius and Saba • Bosnia and Herzegovina • Botswana • Bouvet Island • Brazil

Field Name	Details
	• British Indian Ocean Territory • Brunei Darussalam • Bulgaria • Burkina Faso • Burundi • Cambodia • Cameroon • Canada • Cape Verde • Cayman Islands • Central African Republic • Chad • Chile • China • Christmas Island • Cocos (Keeling) Islands • Colombia • Comoros • Congo • Congo, the Democratic Republic of the • Cook Islands • Costa Rica • Cote d'Ivoire • Croatia • Cuba • Curaçao • Cyprus • Czech Republic • Denmark • Djibouti • Dominica • Dominican Republic • Ecuador • Egypt • El Salvador • Equatorial Guinea • Eritrea • Estonia

Field Name	Details
	- Ethiopia - Falkland Islands (Malvinas) - Faroe Islands - Fiji - Finland - France - French Guiana - French Polynesia - French Southern Territories - Gabon - Gambia - Georgia - Germany - Ghana - Gibraltar - Greece - Greenland - Grenada - Guadeloupe - Guatemala - Guernsey - Guinea - Guinea-Bissau - Guyana - Haiti - Heard Island and McDonald Islands - Holy See (Vatican City State) - Honduras - Hungary - Iceland - India - Indonesia - Iran, Islamic Republic of - Iraq - Ireland - Isle of Man - Israel - Italy

Field Name	Details
	- Jamaica - Japan - Jersey - Jordan - Kazakhstan - Kenya - Kiribati - Korea, Democratic People's Republic of - Korea, Republic of - Kuwait - Kyrgyzstan - Lao People's Democratic Republic - Latvia - Lebanon - Lesotho - Liberia - Libyan Arab Jamahiriya - Liechtenstein - Lithuania - Luxembourg - Macao - Macedonia, the former Yugoslav Republic of - Madagascar - Malawi - Malaysia - Maldives - Mali - Malta - Martinique - Mauritania - Mauritius - Mayotte - Mexico - Moldova, Republic of - Monaco - Mongolia - Montenegro - Montserrat

Field Name	Details
	• Morocco
	• Mozambique
	• Myanmar
	• Namibia
	• Nauru
	• Nepal
	• Netherlands
	• New Caledonia
	• New Zealand
	• Nicaragua
	• Niger
	• Nigeria
	• Niue
	• Norfolk Island
	• Norway
	• Oman
	• Pakistan
	• Palestine
	• Panama
	• Papua New Guinea
	• Paraguay
	• Peru
	• Philippines
	• Pitcairn
	• Poland
	• Portugal
	• Qatar
	• Reunion
	• Romania
	• Russian Federation
	• Rwanda
	• Saint Barthélemy
	• Saint Helena, Ascension and Tristan da Cunha
	• Saint Kitts and Nevis
	• Saint Lucia
	• Saint Martin (French part)
	• Saint Pierre and Miquelon
	• Saint Vincent and the Grenadines

Field Name	Details
	• Samoa
	• San Marino
	• Sao Tome and Principe
	• Saudi Arabia
	• Senegal
	• Serbia
	• Seychelles
	• Sierra Leone
	• Singapore
	• Sint Maarten (Dutch part)
	• Slovakia
	• Slovenia
	• Solomon Islands
	• Somalia
	• South Africa
	• South Georgia and the South Sandwich Islands
	• South Sudan
	• Spain
	• Sri Lanka
	• Sudan
	• Suriname
	• Svalbard and Jan Mayen
	• Swaziland
	• Sweden
	• Switzerland
	• Syrian Arab Republic
	• Taiwan
	• Tajikistan
	• Tanzania, United Republic of
	• Thailand
	• Timor-Leste
	• Togo
	• Tokelau
	• Tonga
	• Trinidad and Tobago
	• Tunisia
	• Turkey
	• Turkmenistan

Field Name	Details
	• Turks and Caicos Islands
	• Tuvalu
	• Uganda
	• Ukraine
	• United Arab Emirates
	• United Kingdom
	• United States
	• Uruguay
	• Uzbekistan
	• Vanuatu
	• Venezuela, Bolivarian Republic of
	• Vietnam
	• Virgin Islands, British
	• Wallis and Futuna
	• Western Sahara
	• Yemen
	• Zambia
	• Zimbabwe

CountryOfResidence__c

Type
string

Properties
Create, Filter, Group, Nillable, Sort, Update

Description
Country of primary residence.

CreatedFromLead__c

Type
boolean

Properties
Create, Defaulted on create, Filter, Group, Sort, Update

Description
Indicates whether this individual was created from a converted lead (`true`) or not (`false`).

CurrentEmployer__c

Type
string

Properties
Create, Filter, Group, Nillable, Sort, Update

Description
Name of current employer.

Field Name	Details
CustomerTimezone__c	**Type**
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Primary time zone.
	Valid values:
	• Africa/Cairo
	• Africa/Johannesburg
	• Africa/Nairobi
	• America/Anchorage
	• America/Bogota
	• America/Buenos_Aires
	• America/Caracas
	• America/Chicago
	• America/Denver
	• America/El_Salvador
	• America/Halifax
	• America/Indianapolis
	• America/Lima
	• America/Los_Angeles
	• America/Mexico_City
	• America/New_York
	• America/Panama
	• America/Phoenix
	• America/Puerto_Rico
	• America/Santiago
	• America/Sao_Paulo
	• America/St_Johns
	• America/Tijuana
	• Asia/Baghdad
	• Asia/Bangkok
	• Asia/Calcutta
	• Asia/Colombo
	• Asia/Dacca
	• Asia/Dubai
	• Asia/Hong_Kong
	• Asia/Jakarta

Field Name	Details
	• Asia/Jerusalem
	• Asia/Kabul
	• Asia/Kamchatka
	• Asia/Karachi
	• Asia/Katmandu
	• Asia/Kuala_Lumpur
	• Asia/Kuwait
	• Asia/Manila
	• Asia Rangoon
	• Asia/Riyadh
	• Asia/Saigon
	• Asia/Seoul
	• Asia/Shanghai
	• Asia/Singapore
	• Asia/Taipei
	• Asia/Tashkent
	• Asia/Tbilisi
	• Asia/Tehran
	• Asia/Tokyo
	• Asia/Yekaterinburg
	• Atlantic/Bermuda
	• Atlantic/Cape_Verde
	• Atlantic/South_Georgia
	• Australia/Adelaide
	• Australia/Brisbane
	• Australia/Darwin
	• Australia/Lord_Howe
	• Australia/Perth
	• Australia/Sydney
	• Europe/Amsterdam
	• Europe/Athens
	• Europe/Berlin
	• Europe/Bucharest
	• Europe/Brussels
	• Europe/Dublin
	• Europe/Helsinki
	• Europe/Istanbul
	• Europe/Lisbon

Field Name	Details
	• Europe/London
	• Europe/Minsk
	• Europe/Moscow
	• Europe/Paris
	• Europe/Prague
	• Europe/Rome
	• GMT
	• Pacific/Auckland
	• Pacific/Chatham
	• Pacific/Enderbury
	• Pacific/Fiji
	• Pacific/Guadalcanal
	• Pacific/Honolulu
	• Pacific/Kiritimati
	• Pacific/Niue
	• Pacific/Norfolk
	• Pacific/Pago_Pago
	• Pacific/Tongatapu

Field Name	Details
EmailVerified__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the individual's email address has been verified (`true`), or not (`false`).
EmployedSince__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Tenure with current employer.
Facebook__c	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Facebook profile URL.

Field Name	Details
FaxVerified__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the individual's fax number has been verified (`true`), or not (`false`).
Gender__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Gender. Valid values: • Female • Male • Decline to Specify • Other
HomeOwnership__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist Sort, Update **Description** Relationship to primary residence. Valid values: • Rent • Own • Other
HomePhoneVerified__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the home phone number has been verified (`true`), or not (`false`).
IndividualId__c	**Type** string

Field Name	Details
	Properties Filter, Nillable, Sort **Description** Unique ID that relates this individual's contact record to its account record. Calculated from `Account.IndividualId__c`.
`IndividualType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of individual. Valid values: • Individual
`LanguagesSpoken__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Languages spoken.
`LastFourDigitSSN__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Last four digits of the individual's Social Security number. This field is encrypted.
`LinkedIn__c`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** LinkedIn profile URL.
`MailingAddress__c`	**Type** string **Properties** Filter, Nillable, Sort

Field Name	Details
	Description The compound form of the mailing address. Based on these address fields: `MailingStreet`, `MailingCity`, `MailingState`, `MailingPostalCode`, and `MailingCountry`.
MaritalStatus__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Marital status. Valid values: • Single • Married • Separated • Divorced • Widowed
MarketingOptOut__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indication that the individual has opted out of receiving marketing materials. (`true`) or not (`false`).
MobileVerified__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates the mobile phone number has been verified (`true`), or not (`false`).
MostUsedChannel__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Most frequent communication channel. Valid values:

Field Name	Details
	• Mobile
	• Web
	• Branch
	• Call Center
	• Other
MotherMaidenName__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Maiden name of the individual's mother.
NextLifeEvent__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Next major life event. Valid values: • Children • Critical Family Event • Enter Workforce • First Home Purchase • Higher Education • Moving • Promotion • Renovations • Retirement • Returning to Workforce
NumberOfChildren__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of children.

Field Name	Details
NumberOfDependents__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of dependents.
Occupation__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Occupation.
OtherAddress__c	**Type** string **Properties** Filter, Nillable, Sort **Description** The compound form of the other address. Based on these address fields: `OtherStreet`, `OtherCity`, `OtherState`, `OtherPostalCode`, and `OtherCountry`.
PreferredName__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** This individual's preferred name.
PrimaryAddressIsBilling__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the billing address is the primary address (`true`) or not (`false`).
PrimaryAddressIsMailing__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field Name	Details
	Description Indicates whether the mailing address is the primary address (`true`) or not (`false`).
`PrimaryAddressIsOther__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the other address is the primary address (`true`) or not (`false`).
`PrimaryAddressIsShipping__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the shipping address is the primary address (`true`) or not (`false`).
`PrimaryCitizenship__`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Country of primary citizenship. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba • Australia • Austria

Field Name	Details
	- Azerbaijan - Bahamas - Bahrain - Bangladesh - Barbados - Belarus - Belgium - Belize - Benin - Bermuda - Bhutan - Bolivia, Plurinational State of - Bonaire, Sint Eustatius and Saba - Bosnia and Herzegovina - Botswana - Bouvet Island - Brazil - British Indian Ocean Territory - Brunei Darussalam - Bulgaria - Burkina Faso - Burundi - Cambodia - Cameroon - Canada - Cape Verde - Cayman Islands - Central African Republic - Chad - Chile - China - Christmas Island - Cocos (Keeling) Islands - Colombia - Comoros - Congo - Congo, the Democratic Republic of the - Cook Islands

Field Name	Details
	- Costa Rica - Cote d'Ivoire - Croatia - Cuba - Curaçao - Cyprus - Czech Republic - Denmark - Djibouti - Dominica - Dominican Republic - Ecuador - Egypt - El Salvador - Equatorial Guinea - Eritrea - Estonia - Ethiopia - Falkland Islands (Malvinas) - Faroe Islands - Fiji - Finland - France - French Guiana - French Polynesia - French Southern Territories - Gabon - Gambia - Georgia - Germany - Ghana - Gibraltar - Greece - Greenland - Grenada - Guadeloupe - Guatemala - Guernsey

Field Name	Details

- Guinea
- Guinea-Bissau
- Guyana
- Haiti
- Heard Island and McDonald Islands
- Holy See (Vatican City State)
- Honduras
- Hungary
- Iceland
- India
- Indonesia
- Iran, Islamic Republic of
- Iraq
- Ireland
- Isle of Man
- Israel
- Italy
- Jamaica
- Japan
- Jersey
- Jordan
- Kazakhstan
- Kenya
- Kiribati
- Korea, Democratic People's Republic of
- Korea, Republic of
- Kuwait
- Kyrgyzstan
- Lao People's Democratic Republic
- Latvia
- Lebanon
- Lesotho
- Liberia
- Libyan Arab Jamahiriya
- Liechtenstein
- Lithuania
- Luxembourg
- Macao

Field Name	Details
	- Macedonia, the former Yugoslav Republic of - Madagascar - Malawi - Malaysia - Maldives - Mali - Malta - Martinique - Mauritania - Mauritius - Mayotte - Mexico - Moldova, Republic of - Monaco - Mongolia - Montenegro - Montserrat - Morocco - Mozambique - Myanmar - Namibia - Nauru - Nepal - Netherlands - New Caledonia - New Zealand - Nicaragua - Niger - Nigeria - Niue - Norfolk Island - Norway - Oman - Pakistan - Palestine - Panama - Papua New Guinea - Paraguay

Field Name	Details
	- Peru - Philippines - Pitcairn - Poland - Portugal - Qatar - Reunion - Romania - Russian Federation - Rwanda - Saint Barthélemy - Saint Helena, Ascension and Tristan da Cunha - Saint Kitts and Nevis - Saint Lucia - Saint Martin (French part) - Saint Pierre and Miquelon - Saint Vincent and the Grenadines - Samoa - San Marino - Sao Tome and Principe - Saudi Arabia - Senegal - Serbia - Seychelles - Sierra Leone - Singapore - Sint Maarten (Dutch part) - Slovakia - Slovenia - Solomon Islands - Somalia - South Africa - South Georgia and the South Sandwich Islands - South Sudan - Spain - Sri Lanka - Sudan - Suriname

Field Name	Details
	• Svalbard and Jan Mayen
	• Swaziland
	• Sweden
	• Switzerland
	• Syrian Arab Republic
	• Taiwan
	• Tajikistan
	• Tanzania, United Republic of
	• Thailand
	• Timor-Leste
	• Togo
	• Tokelau
	• Tonga
	• Trinidad and Tobago
	• Tunisia
	• Turkey
	• Turkmenistan
	• Turks and Caicos Islands
	• Tuvalu
	• Uganda
	• Ukraine
	• United Arab Emirates
	• United Kingdom
	• United States
	• Uruguay
	• Uzbekistan
	• Vanuatu
	• Venezuela, Bolivarian Republic of
	• Vietnam
	• Virgin Islands, British
	• Wallis and Futuna
	• Western Sahara
	• Yemen
	• Zambia
	• Zimbabwe
PrimaryLanguage__c	**Type** picklist

Field Name	Details

Properties

Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Description

This individual's primary language.

Valid values:

- Abkhaz
- Adyghe
- Afrikaans
- Akan
- Albanian
- American Sign Language
- Amharic
- Arabic
- Aragonese
- Aramaic
- Armenian
- Aymara
- Balinese
- Basque
- Betawi
- Bosnian
- Breton
- Bulgarian
- Cantonese
- Catalan
- Cherokee
- Chickasaw
- Chinese
- Coptic
- Cornish
- Corsican
- Crimean Tatar
- Croatian
- Czech
- Danish
- Dawro
- Dutch
- English

Field Name	Details
	- Esperanto - Estonian - Ewe - Fiji Hindi - Filipino - Finnish - French - Galician - Georgian - German - Greek, Modern - Greenlandic - Haitian Creole - Hawaiian - Hebrew - Hindi - Hungarian - Icelandic - Indonesian - Inuktitut - Irish (Gaelic) - Italian - Japanese - Javanese - Kabardian - Kalasha - Kannada - Kashubian - Khmer - Kinyarwanda - Korean - Kurdish/Kurdî - Ladin - Latgalian - Latin - Lingala - Livonian - Lojban

Field Name	Details
	• Low German
	• Lower Sorbian
	• Macedonian
	• Malay
	• Malayalam
	• Mandarin
	• Manx
	• Maori
	• Mauritian Creole
	• Min Nan
	• Mongolian
	• Norwegian
	• Oriya
	• Pangasinan
	• Papiamentu
	• Pashto
	• Persian
	• Pitjantjatjara
	• Polish
	• Portuguese
	• Quenya
	• Rapa Nui
	• Romanian
	• Russian
	• Scots
	• Scottish Gaelic
	• Serbian
	• Serbo-Croatian
	• Sinhalese
	• Slovak
	• Slovene
	• Spanish
	• Swahili
	• Swedish
	• Tagalog
	• Tajik
	• Tamil
	• Tarantino

Field Name	Details
	• Telugu
	• Thai
	• Tok Pisin
	• Turkish
	• Twi
	• Ukrainian
	• Upper Sorbian
	• Urdu
	• Uzbek
	• Venetian
	• Vietnamese
	• Vilamovian
	• Võrro
	• Welsh
	• Xhosa
	• Yiddish
	• Zazaki
ReferredByContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact referring this individual.
ReferredByUser__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Internal Salesforce user who made the referral.
ReferrerScore__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A value of 0 to 100. A high score reflects a high rate of referral conversion.

Field Name	Details
SecondaryCitizenship__	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Country of secondary citizenship. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba • Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin • Bermuda • Bhutan • Bolivia, Plurinational State of • Bonaire, Sint Eustatius and Saba • Bosnia and Herzegovina • Botswana • Bouvet Island • Brazil

Field Name	Details
	• British Indian Ocean Territory
	• Brunei Darussalam
	• Bulgaria
	• Burkina Faso
	• Burundi
	• Cambodia
	• Cameroon
	• Canada
	• Cape Verde
	• Cayman Islands
	• Central African Republic
	• Chad
	• Chile
	• China
	• Christmas Island
	• Cocos (Keeling) Islands
	• Colombia
	• Comoros
	• Congo
	• Congo, the Democratic Republic of the
	• Cook Islands
	• Costa Rica
	• Cote d'Ivoire
	• Croatia
	• Cuba
	• Curaçao
	• Cyprus
	• Czech Republic
	• Denmark
	• Djibouti
	• Dominica
	• Dominican Republic
	• Ecuador
	• Egypt
	• El Salvador
	• Equatorial Guinea
	• Eritrea
	• Estonia

Field Name	Details
	- Ethiopia - Falkland Islands (Malvinas) - Faroe Islands - Fiji - Finland - France - French Guiana - French Polynesia - French Southern Territories - Gabon - Gambia - Georgia - Germany - Ghana - Gibraltar - Greece - Greenland - Grenada - Guadeloupe - Guatemala - Guernsey - Guinea - Guinea-Bissau - Guyana - Haiti - Heard Island and McDonald Islands - Holy See (Vatican City State) - Honduras - Hungary - Iceland - India - Indonesia - Iran, Islamic Republic of - Iraq - Ireland - Isle of Man - Israel - Italy

Field Name	Details
	• Jamaica
	• Japan
	• Jersey
	• Jordan
	• Kazakhstan
	• Kenya
	• Kiribati
	• Korea, Democratic People's Republic of
	• Korea, Republic of
	• Kuwait
	• Kyrgyzstan
	• Lao People's Democratic Republic
	• Latvia
	• Lebanon
	• Lesotho
	• Liberia
	• Libyan Arab Jamahiriya
	• Liechtenstein
	• Lithuania
	• Luxembourg
	• Macao
	• Macedonia, the former Yugoslav Republic of
	• Madagascar
	• Malawi
	• Malaysia
	• Maldives
	• Mali
	• Malta
	• Martinique
	• Mauritania
	• Mauritius
	• Mayotte
	• Mexico
	• Moldova, Republic of
	• Monaco
	• Mongolia
	• Montenegro
	• Montserrat

Field Name	Details
	• Morocco
	• Mozambique
	• Myanmar
	• Namibia
	• Nauru
	• Nepal
	• Netherlands
	• New Caledonia
	• New Zealand
	• Nicaragua
	• Niger
	• Nigeria
	• Niue
	• Norfolk Island
	• Norway
	• Oman
	• Pakistan
	• Palestine
	• Panama
	• Papua New Guinea
	• Paraguay
	• Peru
	• Philippines
	• Pitcairn
	• Poland
	• Portugal
	• Qatar
	• Reunion
	• Romania
	• Russian Federation
	• Rwanda
	• Saint Barthélemy
	• Saint Helena, Ascension and Tristan da Cunha
	• Saint Kitts and Nevis
	• Saint Lucia
	• Saint Martin (French part)
	• Saint Pierre and Miquelon
	• Saint Vincent and the Grenadines

Field Name	Details
	• Samoa
	• San Marino
	• Sao Tome and Principe
	• Saudi Arabia
	• Senegal
	• Serbia
	• Seychelles
	• Sierra Leone
	• Singapore
	• Sint Maarten (Dutch part)
	• Slovakia
	• Slovenia
	• Solomon Islands
	• Somalia
	• South Africa
	• South Georgia and the South Sandwich Islands
	• South Sudan
	• Spain
	• Sri Lanka
	• Sudan
	• Suriname
	• Svalbard and Jan Mayen
	• Swaziland
	• Sweden
	• Switzerland
	• Syrian Arab Republic
	• Taiwan
	• Tajikistan
	• Tanzania, United Republic of
	• Thailand
	• Timor-Leste
	• Togo
	• Tokelau
	• Tonga
	• Trinidad and Tobago
	• Tunisia
	• Turkey
	• Turkmenistan

Field Name	Details
	• Turks and Caicos Islands
	• Tuvalu
	• Uganda
	• Ukraine
	• United Arab Emirates
	• United Kingdom
	• United States
	• Uruguay
	• Uzbekistan
	• Vanuatu
	• Venezuela, Bolivarian Republic of
	• Vietnam
	• Virgin Islands, British
	• Wallis and Futuna
	• Western Sahara
	• Yemen
	• Zambia
	• Zimbabwe
`SecondaryLanguage__c`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** This individual's secondary language. Valid values: • Abkhaz • Adyghe • Afrikaans • Akan • Albanian • American Sign Language • Amharic • Arabic • Aragonese • Aramaic • Armenian • Aymara • Balinese

Field Name	Details
	• Basque
	• Betawi
	• Bosnian
	• Breton
	• Bulgarian
	• Cantonese
	• Catalan
	• Cherokee
	• Chickasaw
	• Chinese
	• Coptic
	• Cornish
	• Corsican
	• Crimean Tatar
	• Croatian
	• Czech
	• Danish
	• Dawro
	• Dutch
	• English
	• Esperanto
	• Estonian
	• Ewe
	• Fiji Hindi
	• Filipino
	• Finnish
	• French
	• Galician
	• Georgian
	• German
	• Greek, Modern
	• Greenlandic
	• Haitian Creole
	• Hawaiian
	• Hebrew
	• Hindi
	• Hungarian
	• Icelandic

Field Name	Details
	- Indonesian - Inuktitut - Irish (Gaelic) - Italian - Japanese - Javanese - Kabardian - Kalasha - Kannada - Kashubian - Khmer - Kinyarwanda - Korean - Kurdish/Kurdî - Ladin - Latgalian - Latin - Lingala - Livonian - Lojban - Low German - Lower Sorbian - Macedonian - Malay - Malayalam - Mandarin - Manx - Maori - Mauritian Creole - Min Nan - Mongolian - Norwegian - Oriya - Pangasinan - Papiamentu - Pashto - Persian - Pitjantjatjara

Field Name	Details
	- Polish - Portuguese - Quenya - Rapa Nui - Romanian - Russian - Scots - Scottish Gaelic - Serbian - Serbo-Croatian - Sinhalese - Slovak - Slovene - Spanish - Swahili - Swedish - Tagalog - Tajik - Tamil - Tarantino - Telugu - Thai - Tok Pisin - Turkish - Twi - Ukrainian - Upper Sorbian - Urdu - Uzbek - Venetian - Vietnamese - Vilamovian - Võrro - Welsh - Xhosa - Yiddish - Zazaki

Field Name	Details
ShippingAddress__c	**Type** string **Properties** Filter, Nillable, Sort **Description** The compound form of the shipping address. Based on these address fields: `Account.ShippingStreet`, `Account.ShippingCity`, `Account.ShippingState`, `Account.ShippingPostalCode`, and `Account.ShippingCountry`.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies this individual in an external data source.
TaxBracket__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Rate at which this individual is taxed. Valid values: • 10% • 15% • 25% • 28% • 33% • 35%
TaxId__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Tax Identification Number or Social Security number.
Twitter__c	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Twitter profile URL.
WeddingAnniversary__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of wedding anniversary.

ContactContactRelation

Represents the relationship between any two individuals.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Active__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the relationship is active (`true`) or not (`false`). The default value is `true`.
Contact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Contact that `RelatedContact__c` is related from.
CurrencyIsoCode	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
EndDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship ended.
ExternalId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.
InverseRelationship__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Uniquely identifies the relationship between `Contact` and `RelatedContact__c` so that it can be referenced by a trigger that creates the inverse relationship record.
Name	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Auto-number identifier for the relationship. Label is `Contact Relation Name`.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the relationship record.

Field	Details
RelatedContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Contact that `Contact__c` is related to.
Role__c	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Role that describes how `RelatedContact__c` is related to `Contact__c`
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the relationship in an external data source.
StartDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the relationship started.

Education

Represents an individual's educational background.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Contact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual's contact record.
EducationLevel__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Level of education. Valid values: • Declined to Comment • Graduate • High School • Post Graduate
GraduationDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of graduation from the corresponding education level.
Institution__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the educational institution that awarded the degree.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.

Employment

Represents information about an individual's employment history.

Supported Calls

create(), delete(), describeLayout(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()

Fields

Field	Details
AnnualIncome__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Gross annual income as reported on the most recent tax return.
Contact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual's contact record.
EmployerAddress__c	**Type** textarea **Properties** Create, Nillable, Update **Description** Address of the individual's employer.
EmployerPhoneNumber__c	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Phone number of the employer.
EmploymentStatus__c	**Type** picklist

Field	Details

Properties

Create, Filter, Group, Restricted picklist, Nillable, Sort, Update

Description

Employment status. Valid values:

- Employed
- Self-Employed
- Homemaker
- Retired
- Student
- Unemployed with Income
- Unemployed Without Income

EndDate__c

Type

date

Properties

Create, Filter, Group, Nillable, Sort, Update

Description

End date at former employer.

LengthOfEmployment__c

Type

double

Properties

Create, Filter, Nillable, Sort, Update

Description

Length of employment in years (to two decimal places).

Occupation__c

Type

picklist

Properties

Create, Filter, Group, Restricted picklist, Nillable, Sort, Update

Description

Job category. Valid values:

- Architecture and Engineering
- Arts, Design, Entertainment, Sports, and Media
- Building and Grounds Cleaning or Maintenance
- Community and Social Service
- Computer and Mathematical
- Construction and Extraction
- Education, Training, and Library
- Farming, Fishing, and Forestry

Field	Details
	• Food Preparation and Serving
	• Healthcare Practitioners and Technical
	• Healthcare Support
	• Installation, Maintenance, and Repair
	• Legal
	• Life, Physical, and Social Science
	• Management
	• Office Admin
	• Other
	• Personal Care and Service
	• Production
	• Protective Service
	• Sales
	• Transportation and Material Moving
Position__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Job title.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the individual in an external data source.
StartDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the individual began working for current employer.

Event Custom Fields

Represents an event associated with a client. Custom fields extend the standard Event object for use in Financial Services Cloud.

Fields

Field Name	Details
Expectations__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client expectations that this event relates to.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household associated with the client.
NextSteps__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Next steps for this client event.
Objectives__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Client objectives that this event relates to.
Regarding__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The nature of the most recent interaction. Valid values: • Prospecting • Onboarding • Client Retention • Service

FinancialAccount

Represents a financial account such as an investment account, bank account, or insurance policy.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
Address1__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street address line 1 for mailing address.
Address2__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street address line 2 for mailing address.
ApplicationDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when this individual submitted the financial account application.
APY__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Annual percentage yield. (Can be fractional.)
AssetRebalance__c	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Sort, Update **Description** Indicates whether automatic portfolio rebalancing applies to this financial account (`true`) or not (`false`).
AvailableCredit__c	**Type** currency **Properties** Create, , Filter, Nillable, Sort, Update **Description** Total current available credit for this financial account.
AverageBalance__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Average amount of money in the financial account, over a time period.
Balance__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Amount of money in the financial account.
BalanceLastStatement__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Account balance posted on last statement.
BookedDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date charge or credit booked to account.

Field	Details
CashBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash available in the financial account.
CashLimit__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Maximum cash withdrawal or advance amount.
City__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** City for mailing address.
CloseDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when this financial account was closed.
CollateralDesc__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of collateral provided for loan.
Country__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Country for mailing address.

Field	Details
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
CurrentPostedBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current posted balance in account.
DailyWithdrawalLimit__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount that can be withdrawn in one day.
Description__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the financial account.
Discretionary__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the advisor has discretionary trading authority for this financial account (`true`) or not (`false`).
DrawPeriodMonths__c	**Type** double **Properties** CreateFilter, Nillable, SortUpdate

Field	Details
	Description Number of months an individual can withdraw funds from a credit account.
EscrowBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current balance in escrow account.
ExpectedCloseDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Expected date when the debit account or loan closes.
FinancialAccountChargesAndFees__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reference to Charges and Fees record for the account.
FinancialAccountNumber__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the financial account in an external data source. Label is `Account Number`.
FinancialAccountSource__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Data source. Label is `Source`. Valid values: • Integrator • Manual Entry • Pending

Field	Details
FinancialAccountType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of financial account. Label is `Type`. Valid values: • 401(a) • 401(k) • 403(b) • 529 Plan • Brokerage • Cash Management Account • CD • Checking • Credit Card • Discount Brokerage • Fixed Annuity • Individual Life • IRA • Mutual Fund • Profit Sharing • Rollover IRA • Roth IRA • Savings • Term Life • Variable Life • Whole Life
HeldAway__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this financial account is managed or administered externally (`true`) or in-house (`false`).
HoldingCount__c	**Type** double **Properties** Filter, Nillable, Sort

Field	Details
	Description Number of holdings within this financial account. Calculated by roll-up summary. Label is `Number of Holdings`.
`Household__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this financial account rolls up to.
`InsuredAmount__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The insured value that an insurance policy covers.
`InterestRate__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest rate as a percent.
`InvestmentObjectives__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Purpose of this financial account. Valid values: • Safety • Income • Growth • Tax Optimization • Liquidity
`JointOwner__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	Joint owner of this financial account.
LastActivityDate	**Type**
	date
	Properties
	Filter, Group, Nillable, Sort
	Description
	Timestamp for when this financial account last had a task or event action associated with the record.
LastReferencedDate	**Type**
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Timestamp for when the current user last viewed a record related to this record.
LastTransactionDate	**Type**
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Timestamp for the last transaction on the account.
LastUpdated__c	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Timestamp for when data for the financial account was last updated by an external data source.
LastViewedDate	**Type**
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Timestamp for when the current user last viewed this record.
LienHolder__c	**Type**
	string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Name of lien holder on the financial account.
LoanAmount__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Amount of the loan.
LoanEndDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** End date for the loan.
LoanTermMonths__c	**Type** double **Properties** CreateFilter, Nillable, SortUpdate **Description** Loan term in months.
Managed__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this financial account is managed or administered (`true`), or not (`false`).
MinimumBalance__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Minimum balance requirement for this financial account.

Field	Details
MinimumPayment__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Minimum monthly payment on account.
ModelPortfolio__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Model asset allocation for the financial account. Valid values: • Conservative • Moderate • Balanced • Growth • Aggressive
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of the financial account.
NickName__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Nickname of the financial account.
OpenDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the financial account was opened.

Field	Details
OverDraftAllowed__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the financial account allows an overdraft (true) or not (false).
OverDraftLinkedAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Reference to the linked overdraft account.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the financial account record.
Ownership__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of ownership for the account. Valid values: • Individual • Joint • Trust
OwnerType__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual's ownership role (primary or joint) for the account.
PaperlessDelivery__c	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Account owner elects to receive electronic delivery of financial account documents (`true`) or not (`false`).
PaymentAmount__c	**Type** currency **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Minimum monthly payment on account.
PaymentDueDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when payment due on the account.
PaymentFrequency__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency of payments on the account. Valid values: • Weekly • Biweekly • Monthly • Quarterly • Semiannually • Annually
PendingDeposits__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Deposits pending on the account.

Field	Details
PendingWithdrawals__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** WIthdrawals pending on the account.
Performance1Yr__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past year.
Performance3Yr__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past three years.
PerformanceMTD__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past month-to-date.
PerformanceQTD__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past quarter-to-date.
PerformanceYTD__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Performance measured over the past calendar year-to-date.

Field	Details
PolicyTerm__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The period of coverage provided by the policy.
PostalCode__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Postal code for mailing address.
Premium__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount paid to the insurer for insurance policy coverage.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of the financial account.
PrincipalBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Principal balance on the loan account.
ProductName__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Policy product name.

Field	Details
RebalanceFrequency__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency of portfolio rebalancing for this financial account. Valid values: • Monthly • Quarterly • Semiannually • Annually
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this financial account.
RecordTypeName__c	**Type** string **Properties** Filter, Nillable, Sort **Description** Record type for this financial account. The value is copied from `RecordType.Name` and can't be changed. Label is `Record Type`.
RenewalDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when insurance policy renewal is due.
RepaymentPeriodMonths__c	**Type** double **Properties** CreateFilter, Nillable, SortUpdate **Description** Repayment period in months.

99

Field	Details
RoutingNumber__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Bank routing number.
ServiceProvider__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Custodian or recordkeeper of this financial account.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the financial account in an external data source.
State__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** State for mailing address.
StatementFrequency__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Frequency statements are issued. Valid values: • Monthly • Biweekly • Quarterly • Annually
Status__c	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Status of this financial account. Valid values: • Open • Closed • On Hold • Pending
TaxID__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Tax Identification Number associated with this financial account.
TaxStatus__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of tax treatment this financial account qualifies for. Valid values: • Nonqualified • Qualified
TimeHorizon__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Investment time frame for this financial account. Valid values: • Long Term • Medium Term • Short Term
TotalCreditLimit__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Total credit limit.
Type__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of account. Valid values: • Brokerage • Discount Brokerage • CD • Checking • Cash Management Account • Credit Card • Savings • Mutual Fund, Fixed Annuity • Variable Annuity • Managed Account • Individual Life • Term Life • Variable Life • Whole Life

FinancialAccountRole

Represents the role occupied by a person or organizational entity that is involved with a financial account, such as a beneficiary or trustee.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()

Fields

Field	Details
Active__c	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the organizational entity or person currently occupies this role (`true`) or not (`false`).
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
Editable__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this field is editable (`true`) or not (`false`).
EndDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** End date when the organizational entity or person relinquished this role.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Financial account that this role is related to.
Name	**Type** string **Properties** Defaulted on create, Filter, idLookup, Sort **Description** Name of the financial account role.

Field	Details
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this financial account role.
RelatedAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the organizational entity that is involved with the financial account.
RelatedContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the person who is involved with the financial account.
Role__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Role that describes how the organizational entity or person is involved with the financial account. Valid values: When the record type is set to Account Role: • Corporation • Foundation When the record type is set to Contact Role: • Trustee • Beneficiary • Grantor • Accountant • Business Manager
SourceSystemId__c	**Type** string

Field	Details
	Properties
	Create, Filter, Group, idLookup, Nillable, Sort, Update
	Description
	ID that uniquely identifies the role in an external data source.
StartDate__c	**Type**
	date
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Start date when the organizational entity or person assumed this role. The default value is the current date.

FinancialAccountTransaction

Represents information about a single financial account transaction.

Supported Calls

create(), delete(), describeLayout(), getDeleted(), getUpdated(), query(), retrieve(), undelete(), update(), upsert()

Fields

Field	Details
Amount__c	**Type**
	currency
	Properties
	Create, Filter, Sort, Update
	Description
	Amount of the transaction.
BillingStatement__c	**Type**
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Billing statement record associated with the account.

Field	Details
CardAccountID__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Card number linked to the transaction.
Description__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the transaction.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial account to which the transaction pertains.
MerchantCategoryCode__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Merchant category code.
PostDate__c	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date the transaction posted to the account.
RunningBalance__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Running balance for the transaction.

Field	Details
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Record ID from an external data source.
SourceTransactionType__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Source transaction type from an external data source.
TransactionDate__c	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Date of the transaction.
TransactionId__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID that uniquely identifies the transaction in an external data source.
TransactionStatus__c	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Nillable, Sort, Update **Description** Status of the transaction. • Pending • Posted
TransactionType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Type of transaction. • Credit • Debit

FinancialGoal

Represents a client's financial goal, such as college funds or a major purchase.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
`ActualValue__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current amount saved toward goal.
`CompletionDate__c`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the goal was reached.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.

Field	Details
Description__c	**Type** textarea **Properties** Create, Nillable, Update **Description** Description of the goal.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this goal is associated with.
InitialValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Starting amount saved toward goal.
LastActivityDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** Timestamp for when this goal last had a task or event action associated with the record.
LastReferencedDate	**Type** date **Properties** Filter, Nillable, Sort, **Description** Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when the current user last viewed this record.

Field	Details
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this goal.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the financial goal record.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of this goal.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the goal in an external data source.
Status__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of goal. Valid values: • Completed • In Progress • Not Started
TargetDate__c	**Type** date

Field	Details
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date when the goal is expected to be reached.
TargetValue__c	**Type**
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Amount required for the goal.
Type__c	**Type**
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Purpose of goal. Valid values:
	• Education
	• Home Purchase
	• Other
	• Retirement

FinancialHolding

Represents a financial holding in an investment account, such as shares of stock.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
AssetCategory__c	**Type**
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details

Description

Subcategory of asset type. Valid values:

- U.S. Equity
- Sector Equity
- Allocation
- International Equity
- Alternative
- Commodities
- Taxable Bond
- Municipal Bond

AssetCategoryName__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Market capitalization and investing style. Valid values: - Large Growth - Large Value - Large Blend - Small Growth - Small Value - Small Blend - Mid-Cap Growth - Mid-Cap Value - Mid-Cap Blend
AssetClass__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Major category of asset type. Valid values: - Equities - Fixed Income - Cash Equivalents - Alternative Investments

Field	Details
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Financial account that this holding is related to.
GainLoss__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Change in value since purchase.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Household that this holding rolls up to.
LastActivityDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** Timestamp for when this financial holding last had a task or event action associated with the record.
LastReferencedDate	**Type** date **Properties** Filter, Nillable, Sort,

Field	Details
	Description Timestamp for when the current user last viewed a record related to this record.
LastUpdated__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when data for this holding was last updated by an external data source.
LastViewedDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when the current user last viewed this record.
MarketValue__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current market value.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this holding.
PercentChange__c	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Percent change in value since purchase.
Price__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Current price per share.
PrimaryOwner__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Primary owner of this holding.
PurchasePrice__c	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Price per-share at time of purchase.
Securities__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the securities held. Label is `Symbol`.
Shares__c	**Type** double **Properties** Create, Filter, Sort, Update **Description** Number of shares held.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the holding in an external data source.
Symbol__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Ticker symbol for the securities held. The value is copied from `Securities__c` and can't be changed.

IdentificationDocument

Represents information about documents used to verify an individual's identity.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
`Account__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account object related to the identification document.
`DocumentNumber__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number listed on the identification document.
`DocumentType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Type of document used to verify the person's identity. Valid values: • Green Card • License • Other

Field	Details

| | • Passport |
| | • Visa |

ExpirationDate__c	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date the document expires.

IssueDate__c	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Date the document was issued.

IssuingCountry__c	**Type**
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The country in which the document was issued. Valid values:
	• Afghanistan
	• Aland Islands
	• Albania
	• Algeria
	• Andorra
	• Angola
	• Anguilla
	• Antarctica
	• Antigua and Barbuda
	• Argentina
	• Armenia
	• Aruba
	• Australia
	• Austria
	• Azerbaijan
	• Bahamas
	• Bahrain

Field	Details
	- Bangladesh - Barbados - Belarus - Belgium - Belize - Benin - Bermuda - Bhutan - Bolivia, Plurinational State of - Bonaire, Sint Eustatius and Saba - Bosnia and Herzegovina - Botswana - Bouvet Island - Brazil - British Indian Ocean Territory - Brunei Darussalam - Bulgaria - Burkina Faso - Burundi - Cambodia - Cameroon - Canada - Cape Verde - Cayman Islands - Central African Republic - Chad - Chile - China - Christmas Island - Cocos (Keeling) Islands - Colombia - Comoros - Congo - Congo, the Democratic Republic of the - Cook Islands - Costa Rica - Cote d'Ivoire - Croatia

Field	Details
	- Cuba - Curaçao - Cyprus - Czech Republic - Denmark - Djibouti - Dominica - Dominican Republic - Ecuador - Egypt - El Salvador - Equatorial Guinea - Eritrea - Estonia - Ethiopia - Falkland Islands (Malvinas) - Faroe Islands - Fiji - Finland - France - French Guiana - French Polynesia - French Southern Territories - Gabon - Gambia - Georgia - Germany - Ghana - Gibraltar - Greece - Greenland - Grenada - Guadeloupe - Guatemala - Guernsey - Guinea - Guinea-Bissau - Guyana

Field	Details
	- Haiti - Heard Island and McDonald Islands - Holy See (Vatican City State) - Honduras - Hungary - Iceland - India - Indonesia - Iran, Islamic Republic of - Iraq - Ireland - Isle of Man - Israel - Italy - Jamaica - Japan - Jersey - Jordan - Kazakhstan - Kenya - Kiribati - Korea, Democratic People's Republic of - Korea, Republic of - Kuwait - Kyrgyzstan - Lao People's Democratic Republic - Latvia - Lebanon - Lesotho - Liberia - Libyan Arab Jamahiriya - Liechtenstein - Lithuania - Luxembourg - Macao - Macedonia, the former Yugoslav Republic of - Madagascar - Malawi

Field	Details
	- Malaysia - Maldives - Mali - Malta - Martinique - Mauritania - Mauritius - Mayotte - Mexico - Moldova, Republic of - Monaco - Mongolia - Montenegro - Montserrat - Morocco - Mozambique - Myanmar - Namibia - Nauru - Nepal - Netherlands - New Caledonia - New Zealand - Nicaragua - Niger - Nigeria - Niue - Norfolk Island - Norway - Oman - Pakistan - Palestine - Panama - Papua New Guinea - Paraguay - Peru - Philippines - Pitcairn

Field	Details
	• Poland
	• Portugal
	• Qatar
	• Reunion
	• Romania
	• Russian Federation
	• Rwanda
	• Saint Barthélemy
	• Saint Helena, Ascension and Tristan da Cunha
	• Saint Kitts and Nevis
	• Saint Lucia
	• Saint Martin (French part)
	• Saint Pierre and Miquelon
	• Saint Vincent and the Grenadines
	• Samoa
	• San Marino
	• Sao Tome and Principe
	• Saudi Arabia
	• Senegal
	• Serbia
	• Seychelles
	• Sierra Leone
	• Singapore
	• Sint Maarten (Dutch part)
	• Slovakia
	• Slovenia
	• Solomon Islands
	• Somalia
	• South Africa
	• South Georgia and the South Sandwich Islands
	• South Sudan
	• Spain
	• Sri Lanka
	• Sudan
	• Suriname
	• Svalbard and Jan Mayen
	• Swaziland
	• Sweden

Field	Details
	• Switzerland
	• Syrian Arab Republic
	• Taiwan
	• Tajikistan
	• Tanzania, United Republic of
	• Thailand
	• Timor-Leste
	• Togo
	• Tokelau
	• Tonga
	• Trinidad and Tobago
	• Tunisia
	• Turkey
	• Turkmenistan
	• Turks and Caicos Islands
	• Tuvalu
	• Uganda
	• Ukraine
	• United Arab Emirates
	• United Kingdom
	• United States
	• Uruguay
	• Uzbekistan
	• Vanuatu
	• Venezuela, Bolivarian Republic of
	• Vietnam
	• Virgin Islands, British
	• Wallis and Futuna
	• Western Sahara
	• Yemen
	• Zambia
	• Zimbabwe
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the financial account in an external data source.

Field	Details
VerifiedBy__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the person who verified the document.
VerifiedOn__c	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date the identification document was verified.

IdentityVerification

Represents information about methods used to verify a client's identity.

Supported Calls

create(), delete(), describeLayout(), getDeleted(), getUpdated(), query(), retrieve(), undelete(),
update(), upsert()

Fields

Field	Details
Account__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account object related to the identity verification.
IsVerified__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the client's identity has been verified.

Field	Details
`VerificationMethod__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Method used to verify the client's identity. Valid values: • External • Last 4 digits of ID • License • Manual • Mother's Maiden Name
`VerifiedBy__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual who verified the client's identity.
`VerifiedOn__c`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date the client's identity was verified.

Lead Custom Fields

Represents a lead associated with an individual. Custom fields extend the Lead object for use in Financial Services Cloud.

Fields

Field Name	Details
`CreatedByMe__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field Name	Details
	Description Indicates whether the user contact was converted from this lead.
CreatedFromLead__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a contact converted from this lead sets the value of `Contact.CreatedFromLead__c` as (`true`) or not (`false`).
Employer__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lead's employer information that converts to the individual's contact record upon lead conversion.
ExpressedInterest__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lead's expressed area of interest. Label is `Category`. Valid values: • Mortgage • Personal Loan • Credit Card • Savings Account • Checking Account • HELOC • Day to Day Banking • Manage Money • Property Purchase • Investments • Education • Manage Debt
Household__c	**Type** reference

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household record associated with the lead record.
PotentialValue__c	**Type** currency **Properties** Filter, Nillable, Sort **Description** Potential value from converting the lead.
ReferredByContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact who made the referral.
ReferredByUser__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Internal Salesforce user who made the referral.
ReferrerScore__c	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A value of 0 to 100. A high score reflects a high rate of referral conversion.
RelatedAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual or household account related to a lead.

LifeEvent

Represents a client's life event, such as a birth or marriage.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
Client__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Individual the life event is related to.
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
DiscussionNote__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes from past discussions.
EventDate__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the life event.
EventType__c	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Type of life event. Valid values: • College • New Baby • New Business • New Home • New Job • Retirement
FinancialGoal__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial goal that the life event is related to.
GoalType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of financial goal implied by the life event. Valid values: • Saving for College • Saving for Retirement
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the goal in an external data source.

Opportunity Custom Fields

Represents an opportunity associated with an individual. Custom fields extend the Opportunity object for use in Financial Services Cloud.

Fields

Field Name	Details
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the billing address is this individual's primary address (`true`) or not (`false`).
ReferredByContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact referring this opportunity.
ReferredByUser__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Internal user referring this opportunity.

ReciprocalRole

Represents the other entity's corresponding role in a one-to-one relationship between entities.

Supported Calls

create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()

Fields

Field	Details
CreateInverseRole__c	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the corresponding reciprocal role record is created automatically for the inverse role (`true`) or not (`false`).
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
InverseRelationship__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Uniquely identifies the relationship between `Role` and `InverseRole__c` so that it can be referenced by a trigger that creates the inverse relationship record.
InverseRole__c	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The role that the other entity occupies in the relationship, such as a grandparent to a grandchild, or an owned business to a proprietor.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.

Field	Details
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of this reciprocal role.
OwnerId	**Type** reference **Properties** Create, Defaulted on createFilter, Group, Sort, Update **Description** ID of the user who created the reciprocal role record.
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the record type associated with this reciprocal role.
RelationshipType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of entities involved in the relationship. Valid values: • All • Contact Contact Relation • Account Account Relation
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the reciprocal role in an external data source.

Securities

Represents a security, such as a stock or bond.

Supported Calls

`create(), delete(), describeLayout(), describeSObjects(), getDeleted(), getUpdated(), query(), retrieve(), search(), undelete(), update(), upsert()`

Fields

Field	Details
CurrencyIsoCode	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies is enabled, contains the currency ISO code associated with the record.
CUSIP__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Committee on Uniform Securities Identification Procedures identification number for the securities.
Exchange__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Exchange on which the securities are traded. Valid values: • NYSE • NASDAQ
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed a record related to this record.

Field	Details
LastUpdated__c	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Timestamp for when data for the securities was last updated by an external data source.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Defaulted on create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of the securities. Label is `Symbol`.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the securities record.
Price__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current price of the securities.
SecuritiesName__c	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name that uniquely identifies the securities.

Field	Details
SecurityId__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the securities.
SourceSystemId__c	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies the securities in an external data source.

Task Custom Fields

Represents a task associated with a client. Custom fields extend the standard Task object for use in Financial Services Cloud.

Fields

Field Name	Details
Expectations__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Expectations that this task relates to.
Household__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household associated with the individual.
NextSteps__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Next steps for this task.
Objectives__c	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Objectives that this task relates to.
Regarding__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The nature of this task. Valid values: • Prospecting • Onboarding • Client Retention • Service

Revenue

Represents data from Financial Services Cloud and external systems to aggregate revenue streams for an advisor's book of business.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
Account__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Account that `Revenue__c` is related from. This field or `FinancialAccount__c` requires an entry but not both.
`Amount__c`	**Type** currency **Properties** Create, Filter Sort, Update **Description** Revenue amount.
`Date__c`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** Date when this revenue was made.
`FinancialAccount__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Financial Account that `Revenue__c` is related from. This field or `Account__c` requires an entry but not both.
`SourceSystemId__c`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** A value that uniquely identifies the revenue in an external data source.
`SubType__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subtype of revenues. Valid values: Transaction, Advisory, Investment, Custodian, Planning.
`Type__c`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The type of revenues. Valid values: Fees, Commission.

User Custom Fields

Represents a user in your organization.

Supported Calls

```
create(),describeLayout(),describeSObjects(),getDeleted(),getUpdated(),query(),retrieve(),
search(),,update(),upsert()
```

Fields

Field	Details
ReferrerScore__c	**Type** double
	Properties Create, Filter, Nillable, Sort, Update
	Description A value of 0 to 100. A high score reflects a high rate of referral conversion.

WealthAppConfig

Represents configuration information for Financial Services Cloud functionality.

Supported Calls

```
create(),delete(),describeLayout(),getDeleted(),getUpdated(),query(),retrieve(),undelete(),
update(),upsert()
```

Fields

Field	Details
InteractionUpdateFrequency	**Type** double **Properties** Create, Defaulted on create, Filter,Nillable, Sort, Update **Description** Frequency (in minutes) with which the Last Interaction and Next Interaction dates are automatically updated. Default is 15 min.
RejectedReferralStatus	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lead status used to identify rejected referrals.

Financial Services Cloud Custom Metadata Types

Use custom metadata types and fields that help deliver additional features for Financial Services Cloud.

Fields and custom metadata types in the package have the `FinServ` namespace prefix. For example, `FinServ__AccountRecordType__c` is a custom field on Individual Record Type Mapper. `FinServ__IndividualRecordTypeMapper__mdt` is a custom metadata type.

Not all fields are listed for some custom metadata types. To verify the complete list of fields for a custom metadata type, use a describe call from the API, inspect the WSDL, or use a schema viewer.

SEE ALSO:

Custom Metadata Types

IndividualRecordTypeMapper

Maps a new custom Individual record type to the standard Individual record type from Financial Services Cloud.

📝 **Note:** New custom fields can't be added to managed custom metadata types.

Supported Calls

`describeLayout(), describeSObjects(), query(), retrieve(), search()`

Field	Details
`AccountRecordTypeNamespace__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace for Account record type being mapped.
`AccountRecordType__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of your new custom Individual record type being mapped to the Financial Services Cloud Individual record type.

Field	Details
	Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.
ContactRecordTypeNamespace__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace for Contact record type being mapped.
ContactRecordType__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Contact record type being mapped to the Financial Services Cloud Individual record type.
DetailPage__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Salesforce internal-use only.
IndividualType__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Type of Individual being mapped.
LeadRecordTypeNamespace__c	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Lead namespace for your custom record type's org.
LeadRecordType__c	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description Lead Record Type to be used when converting Lead records. Leave this field blank to use any record type. All available record types are converted to an Individual record type unless there is another mapping specified.

GroupRecordTypeMapper

Maps a new custom Group record type to the standard Group record type from Financial Services Cloud.

📝 **Note:** New custom fields can't be added to managed custom metadata types.

Supported Calls

`describeLayout(), describeSObjects(), query(), retrieve(), search()`

Field	Details
`AccountRecordType__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of your new custom Group record type being mapped to the Financial Services Cloud Group record type. 📝 **Note:** This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.
`AccountRecordTypeNamespace__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace for Account record type being mapped.

Financial Services Cloud Custom Triggers

Custom triggers ensure that data flows properly through the custom-designed objects and fields for Financial Services Cloud.

Custom triggers that are provided for you, and use the `FinServ` namespace prefix. For example, FinServ__AccountTrigger is a custom trigger on Account that performs tasks on Account, Contact, and the relationship object AccountAccountRelation.

Table 1: Financial Services Cloud Quick Reference for Triggers

Host Object	Trigger Name
AccountAccountRelation	FinServ__AccountAccountRelationTrigger.trigger
AccountContactRelation	FinServ__AccountContactRelationTrigger.trigger
Account	FinServ__AccountTrigger.trigger
Alert	FinServ__AlertTrigger.trigger
AssetsAndLiabilities	FinServ__AssetsAndLiabilitiesTrigger.trigger
ContactcontactRelation	FinServ__ContactContactRelationTrigger.trigger
Contact	FinServ__ContactTrigger.trigger
Event	FinServ__EventTrigger.trigger
FinancialAccountRole	FinServ__FinancialAccountRoleTrigger.trigger
FinancialAccount	FinServ__FinancialAccountTrigger.trigger
FinancialGoal	FinServ__FinancialGoalTrigger.trigger
FinancialHolding	FinServ__FinancialHoldingTrigger.trigger
Lead	FinServ__LeadTrigger.trigger
RBLFilterCriteria	FinServ__RBLFilterCriteriaTrigger.trigger
ReciprocalRole	FinServ__ReciprocalRoleTrigger.trigger
Revenue	FinServ__RevenueTrigger.trigger
RollupByLookupConfig	FinServ__RollupByLookupConfigTrigger.trigger
Securities	FinServ__SecuritiesTrigger.trigger
Task	FinServ__TaskTrigger.trigger

Trigger Behavior

The package provides triggers on SObjects, Relation SObjects, and Rollup SObjects. Each object type's trigger checks for various conditions and then performs tasks based on what it finds. Each object has only one trigger, the following list explains trigger behavior by object.

SObjects

Account

> **Before insert:** Checks the record type to see if the account is a portion of an individual. If it isn't, the `IndividualType` field is set to blank.
>
> **After insert:** Creates an individual contact linked to the account if the user creates an account of record type Individual. Also assigns topics based on the value in the field after a new account has been created.
>
> Steps to create an individual contact and assign topics:
>
> - For each account created, create a contact.
> - For each contact, associate the `AccountId`.
> - For each account, associate the `ContactId`. This is done in a **future** method.
> - Set `IndividualId__c` to the `AccountId`, and set to the current date.
>
> **Before update:** Validates that the update on the account:
>
> - Doesn't change the account's record type from individual to another record type, and doesn't change from one individual record type to another.
> - Doesn't change the account's record type from another record type to an individual record type.
>
> **After update:** Updates the `Account Name` when the `Contact Name` for that client is updated. Also assigns topics based on the values in the field after a new account has been created.
>
> **Before delete:** Helps perform cascade deletes. Gathers all rollup objects related to the account to be deleted.
>
> **After delete:** Rolls back the rollup objects related to the deleted account.

Contact

> **Before insert:** Creates an individual (Account - Representing Party) when the individual contact is promoted as an individual.
>
> - For each account that is passed, create a contact entity.
> - For each contact, associate the `AccountId`.
> - For each account, associate the `ContactId`. This is done in a **future** method.
> - Set `IndividualId__c` to the `AccountId`, and set the current datetime.
>
> **After insert:** Validates that the referenced individual account does not already have a contact associated with it. This check is bypassed during a lead conversion.
>
> **Before update:** Validates that the update on the account record:
>
> - Doesn't change the record type of the account from individual to another record type.
> - Doesn't change the record type of the account from any other record type to an individual.
> - Validates that the referenced individual account does not already have a contact associated with it.
>
> **After update:** Syncs the account associated with the updated contact to reflect the updated fields. The following fields are synced:
>
> - `AccountName`
> - `OwnerId`
> - `IndividualType__c`

- `RecordTypeId`

> **Note:** Revenue and Securities SObjects don't have triggers.

Relation SObjects

AccountContactRelation (ACR)

Before insert: Populates the `RecordTypeId` and the `Date` for each ACR record to be inserted. Ensures that each ACR obeys the following requirements:

- No multiple primary members for a given household
- Contact portion can't be a member of multiple households
- No multiple ACR records with the same `AccountId` and `ContactId` combination

After insert: Recalculates the rollups for all groups in which member or business ACRs are changed.

Before update: Performs the same actions as before the insert.

After update: Performs the same actions as after the insert.

Before delete: Ensures that none of the ACRs to be deleted are of the record type Group. Also recalculates rollups for all groups when any member or business ACRs are changed.

AccountAccountRelation (AAR)

After insert: Creates the inverse record if the auto-create inverse setting is selected.

Before update: Checks to see if records are being deactivated. If so, sets `EndDate__c` as the day of the update, and deactivates the inverse record if the auto-create inverse setting is selected.

Before delete: Deletes the inverse record of the AAR if the auto-create inverse setting is selected.

ContactContactRelation (CCR)

After insert: Creates the inverse record if the auto-create inverse setting is selected.

Before update: Checks to see if records are being deactivated. If so, sets the `EndDate__c` as today, and deactivates the inverse record if the auto-create inverse setting is selected.

Before delete: Deletes the inverse record of the CCR if the auto-create inverse setting is selected.

Rollup SObjects

> **Note:** Rollup SObject triggers generally revolve around updating the `Household__c` field, which points to the account portion of the group that they roll up to. In most cases, the rollup calculation is also calculated.

Financial Account

Before insert: Sets the value of the owner type when an existing FinancialAccount record is updated, then sets the `Household__c` field to the account portion of the group that it's rolling up to.

After insert: At a minimum, creates the primary owner role for a new financial account, along with joint owner roles and user-selected roles if any. Also, performs a rollup calculation.

Before update: Sets the value of the owner type when a financial account is updated, then sets the `Household__c` field to the account portion of the group that it's rolling up to.

After update:

- Creates a primary owner role for a new financial account.
- Creates joint owner roles and user-selected roles if any.

- Performs rollup calculation.

  After delete: Performs rollup calculation.

Assets and Liabilities

Before insert: Sets the value of the owner type when a financial account is updated, then sets the `Household__c` field to the account portion of the group that it's rolling up to.

Before update: Sets the value of the owner type when a financial account is updated, then sets the `Household__c` field to the account portion of the group that the financial account is rolling up to.

Financial Goals

Before insert: Sets the `Household__c` field of the FinancialGoal record to the account portion of the group that the financial goal is rolling up to.

After insert: No validation or action.

Before update: Sets the `Household__c` field of the financial goal to the account portion of the group that the financial goal is rolling up to.

Financial Account Role (FAR)

Before insert: Checks the `RelatedContact__c` field of the FAR record to see if it's associated with an individual account. Updates the `RelatedAccount__c` field to that of the individual account if it is.

Before update:

- Checks the `RelatedContact__c` field of the FAR record to see if it's associated with an individual account. Updates the `RelatedAccount__c` field if it is.

- Sets the end day to the day of the update on the FARs that were deactivated.

Financial Holdings

Before insert: Retrieves financial account fields based on the FinancialHolding record and then populates the `Household__c` and `PrimaryOwner` fields on the financial holding to be inserted.

> Note: Financial holdings are not part of the rollup objects, so no rollup is performed.