Financial Services Cloud Developer Guide

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@salesforcedocs

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CONTENTS

FINANCIAL SERVICES CLOUD DEVELOPER GUIDE 1

FINANCIAL SERVICES CLOUD STANDARD AND CUSTOM OBJECTS 2

Account Custom Fields 2
AccountAccountRelation 18
AccountContactRelation Standard and Custom Fields 20
AccountParticipant 23
Alert 25
AssetsAndLiabilities 27
AuthorizedInsuranceLine 31
Award 32
Banker 36
BatchCalcJobDefinitionView 38
BatchJob 41
BatchJobPart 44
BatchJobPartFailedRecord 47
BillingStatement 48
BranchUnit 52
BranchUnitBusinessMember 55
BranchUnitCustomer 57
BranchUnitRelatedRecord 59
BusinessLicense 61
BusinessMilestone 66
BusinessProfile 70
Card 72
CaseGatewayRequest 74
ChargesAndFees 76
Claim 80
ClaimCase 87
ClaimCoverage 89
ClaimItem 92
ClaimParticipant 95
ClaimPaymentSummary 97
Contact Custom Fields 99
ContactContactRelation 138
CoverageType 141
CustomerProperty 146
DistributorAuthorization 155
DocumentChecklistItem 158

DocumentType 162
Education 163
Employment 164
Event Custom Fields 167
FinancialAccount 168
FinancialAccountRole 187
FinancialAccountTransaction 190
FinancialGoal 193
FinancialHolding 196
IdentificationDocument 201
IdentityDocument 209
IdentityVerification 211
InsuranceClaimAsset 213
InsurancePolicy 215
InsurancePolicyAsset 227
InsurancePolicyCoverage 231
InsurancePolicyMemberAsset 238
InsurancePolicyParticipant 240
InsurancePolicySurcharge 245
InsurancePolicyTransaction 248
InsuranceProfile 251
Interaction 255
InteractionAttendee 257
InteractionSummary 258
InteractionSummaryParticipant 261
Lead Custom Fields 263
LifeEvent 266
LoanApplicant 267
LoanApplicantAddress 275
LoanApplicantAsset 279
LoanApplicantDeclaration 281
LoanApplicantEmployment 287
LoanApplicantIncome 294
LoanApplicantLiability 297
LoanApplicationAsset 299
LoanApplicationFinancial 306
LoanApplicationLiability 315
LoanApplicationProperty 320
LoanApplicationTitleHolder 325
Opportunity Custom Fields 327
OpportunityParticipant 328
ParticipantRole 329
PersonEducation 331
PersonLifeEvent 335

PolicyPaymentMethod . . . 338
Producer . . . 340
ProducerCommission . . . 342
ProducerPolicyAssignment . . . 346
ProductCoverage . . . 348
ReciprocalRole . . . 350
ResidentialLoanApplication . . . 353
Revenue . . . 364
Securities . . . 366
SecuritiesHolding . . . 369
Task Custom Fields . . . 373
User Custom Fields . . . 374
WealthAppConfig . . . 375
WorkerCompCoverageClass . . . 375

FINANCIAL SERVICES CLOUD SETUP OBJECTS . . . 379
BatchCalcJobDefinition . . . 379
BatchJobDefinition . . . 382

FINANCIAL SERVICES CLOUD ASSOCIATED OBJECTS . . . 388
StandardObjectNameFeed . . . 388
StandardObjectNameHistory . . . 394
StandardObjectNameOwnerSharingRule . . . 397
StandardObjectNameShare . . . 399

FINANCIAL SERVICES CLOUD BUSINESS APIS . . . 402
REST Reference . . . 402

FINANCIAL SERVICES CLOUD METADATA API . . . 484
AccountRelationhipShareRule . . . 484
BatchCalcJobDefinition . . . 485
Flow for Financial Services Cloud . . . 498
Icon . . . 498
IndustriesSettings . . . 500
ParticipantRole . . . 503

FINANCIAL SERVICES CLOUD STANDARD INVOCABLE ACTIONS . . . 506
Create Financial Records Actions . . . 506
Data Processing Engine Actions . . . 508

FINANCIAL SERVICES CLOUD CUSTOM METADATA TYPES . . . 510
Financial Services Cloud Custom Metadata Types . . . 510
IndividualRecordTypeMapper . . . 510
GroupRecordTypeMapper . . . 512

ReferralRecordTypeMapper 512

FINANCIAL SERVICES CLOUD CUSTOM TRIGGERS 514
Financial Services Cloud Custom Triggers 514

FINANCIAL SERVICES CLOUD PLATFORM EVENT 520
BatchJobStatusChangedEvent 520

DATA PROCESSING ENGINE AND MONITOR WORKFLOW SERVICES . . 522

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 custom objects, components, classes, and triggers delivered in the Financial Services Cloud managed package are one API version behind the core Salesforce API. Financial Services Cloud standard objects have the same API version as core Salesforce. For example, if your org's API version is 43, the custom objects in the Financial Services Cloud managed package are API version 42, and the standard Financial Services Cloud objects are API version 43.

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.
`ClaimsOnHouseholdPolicies__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total number of claims raised for the active policies that the policyholder's primary household owns.

Field Name	Details
`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: • Platinum • Gold • Silver • Bronze • Investments
`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.

Field Name	Details
`CustomerSegment__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Individual's market segment. Valid values: • Borrower • Long-Term Growth • Mass Affluent • Mass Market • Millennial • Transactional • Wealth Accumulation
`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

Field Name	Details
	• Retirement • College Planning
`HouseholdPolicies__c`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total number of active policies that the policyholder's primary household owns.
`IndividualId__c`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Read only. Unique ID that relates this individual's account record to its contact record.
`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.
`InvestmentExperience__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This individual's investment experience. Valid values: • Experienced • Moderately Experienced • Moderately Inexperienced

Field Name	Details
	• Inexperienced
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
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

Field Name	Details
	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 **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

Field Name	Details
	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
`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`.

Field Name	Details
`PersonalInterests__c`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Personal areas of interest. Valid values: • Cooking • College Basketball • Environment • Hiking • Biking • Wine
`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

Field Name	Details
	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 **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

Field Name	Details
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: • 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.

Field Name	Details
`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 **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.
`TotalClaimAmountPaid__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount paid for all claims for the active policies for a policyholder's primary household.

Field Name	Details
`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 **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

Field Name	Details
	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`.
`TotalHouseholdPremiums__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total premiums for all active policies for a policyholder's primary household.
`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.
`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

Field Name	Details
	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`.
`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

Field Name	Details
	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.
`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

Field Name	Details
	Description Read only. Percentage of this individual'sfinancial 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 **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.

Field	Details
`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 **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

Field	Details
	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

Field	Details
	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.
`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`.

Field	Details
`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 • Technical Buyer • Economic Buyer • Other • Decision Maker • Economic Decision Maker • Executive Sponsor

Field	Details
	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.

AccountParticipant

Represents information about a participant in the context of an account record. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the account related to the participant.
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes about this participant.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this participant is active.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description An automatically generated name for the participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the user or group related to the participant.
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the object-based role for this participant.

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

Field	Details
	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 **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

Field	Details
	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

Field	Details
	• 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
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.

Field	Details
`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.
`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.

Field	Details
`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 **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.

AuthorizedInsuranceLine

Represents the insurance lines that an insurance company is authorized to sell. This object is available in API version 48.0 and later.

Supported Calls

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

Fields

Field	Details
`Country`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country where the insurance company can sell this insurance line.
`InsuranceLine`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance line that the insurance company is authorized to sell. Possible values are: • `Disability` • `Life` • `Property`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LegalEntityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Legal entity ID of the insurance company that this authorization has been issued to.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-number identifier for the insurance line.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

AuthorizedInsuranceLineFeed
Feed tracking is available for the object.

AuthorizedInsuranceLineHistory
History is available for tracked fields of the object.

AuthorizedInsuranceLineSharingRule
Sharing rules are available for the object.

AuthorizedInsuranceLineShare
Sharing is available for the object.

Award

Represents a person's or organization's professional awards.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the organization receiving the award.
`AwardDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date award was received.
`AwardedBy`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the issuing organization.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Person who received the award and is listed as a contact.
`Identifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Issuing organization's identifier for the award recipient.

Field	Details
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Award name.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Award status. Example values:

Field	Details
	• Inactive • Revoked • Draft • Verified
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who received the award and is listed as a user.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Current award status. Example values: • Authorized • Pending • Unverified
`VerifiedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Award was validated on this date.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

AwardFeed
Feed tracking is available for the object.

AwardHistory
History is available for tracked fields of the object.

AwardOwnerSharingRule
Sharing rules are available for the object.

AwardShare
Sharing is available for the object.

Banker

Represents a business unit member who is assigned the banker role for a branch unit. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`CurrentBranchId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the branch associated with this banker's current work.
`CurrentBranchStartTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when this banker made this branch assignment current.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Information about the assignment of this person to the banker role.
`JobCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An identifier that relates the banker to an external system.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description**
`Level`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the organizational level of the banker. Possible values are: • `1` • `2` • `3` • `4` • `5` • `6` • `7` • `8` • `9` • `10` The default value is '1'.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of this assignment of a banker to a branch.

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`ServiceResourceId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a service resource that lets this user be assigned to service territories.
`UserOrContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The contact or user associated with the banker.

BatchCalcJobDefinitionView

Represents the details of a Data Processing Engine definition. The definition can also be a file-based definition that is available in your Salesforce org. This object is available in API version 51.0 and later.

Supported Calls

`describeSObjects(),query()`

Fields

Field	Details
`Description`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The description of a Data Processing Engine definition.

Field	Details
`DurableId`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier for the field. Always retrieve this value before using it, as the value isn't guaranteed to stay the same from one release to the next. Simplify queries by using this field instead of making multiple queries.
`InstalledPackageName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the package used to add the definition to the org.
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the definition is active.
`IsTemplate`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the definition is a template. You can make a copy of a template definition and update it based on your requirements.
`LastModifiedBy`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the user who modified the definition last.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	Description Indicates the manageable state of the definition if it is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The label of the Data Processing Engine definition.
`Name`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the Data Processing Engine definition.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the namespacePrefix__componentName notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.

Field	Details
	• In organizations that are not Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
`ProcessType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The process type of the definition. Possible values are: • `DataProcessingEngine`—Standard • `Rebates` • `Loyalty` • `FSCHierarchyRollUp`

BatchJob

Represents an instance of a batch job that is either running and has been run. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`BatchJobDefinitionId`	**Type** reference **Properties** Filter, Group, Sort **Description** The unique identifier of the associated batch job definition.
`BatchJobDefinitionName`	**Type** string **Properties** Filter, Group, Sort

Field	Details
	Description The developer name of the associated batch job definition.
`EndTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the batch job run was completed.
`ErrorDescription`	**Type** string **Properties** Filter, Nillable, Sort **Description** The error message in case the batch job run failed.
`ExternalReference`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the process that's running or has run the batch job.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed the batch job.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this item.
`Name`	**Type** string **Properties** Filter, Group, idLookup, Sort

Field	Details
	Description The name of the batch job.
`OwnerId`	**Type** reference **Properties** Filter, Group, Sort **Description** Unique identifier of the user who initiated the batch job run.
`ProcessGroup`	**Type** string **Properties** Filter, Group, Sort **Description** The group or team for which the batch job is run.
`RetryCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of times the batch job run is automatically rerun in case it fails.
`RuntimeParameter`	**Type** textarea **Properties** Nillable **Description** The values of the input variables that are used as filter criterias in a Batch Management job.
`StartTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the batch job run was started.
`Status`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort

Field	Details
	Description The status of the batch job run. Possible values are: • `Cancelled`—Canceled • `Completed` • `CompletedWithFailures`—Completed With Failures • `Failed` • `InProgress`—In Progress • `Submitted`
`Type`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** The type of batch job that is run. Possible values are: • `Calc`—Data Processing Engine • `Flow`

BatchJobPart

Represents one part of a batch job. This object is available in API version 51.0 and later.

When a batch job is run, it is divided in to multiple parts. Each part is used to process a specific number of records.

Supported Calls

`describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`

Fields

Field	Details
`BatchJobId`	**Type** reference **Properties** Filter, Group, Sort **Description** The unique identifier of the associated batch job.

Field	Details
`EndTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the batch job part was processed.
`ErrorDescription`	**Type** string **Properties** Filter, Nillable, Sort **Description** The error message in case the batch job part failed.
`FailedRecordCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of records that the batch job part couldn't process.
`InputRecordCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of records that the batch job part must process.
`Name`	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** The name of the batch job part.
`OutputRecordCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of records the batch job part has processed.

Field	Details
`ParentBatchJobPartId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the part batch job part associated with the batch job part.
`RetryCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of times the batch job part is automatically rerun in case it fails.
`StartTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the batch job part's run was started.
`Status`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** The status of the batch job part. Possible values are: • `Cancelled`—Canceled • `Completed` • `Failed` • `InProgress`—In Progress
`Type`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of node in case the associated batch job is of the type Calc (Data Processing Engine). Possible values are:

Field	Details
	• Aggregate • Append • Compute • Datasink • Filter • Join • Slice • Source • Transform • Writeback

BatchJobPartFailedRecord

Represents records that a batch job part couldn't successfully process. This object is available in API version 51.0 and later.

Supported Calls

`describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`

Fields

Field	Details
BatchJobId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the associated batch job.
BatchJobPartId	**Type** reference **Properties** Filter, Group, Sort **Description** The unique identifier of the associated batch job part.
ErrorDescription	**Type** string

Field	Details
	Properties Filter, Nillable, Sort **Description** The error message that indicates why the batch job part couldn't process the records.
`Name`	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** The name of the batch job part failed record.
`Record`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the batch record that processed the failed records.

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.
InsurancePolicy__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy associated with the 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.

Field	Details
OtherCredits__c	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Other credits made during the billing period.
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.

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

BranchUnit

Represents details about a branch of an organization. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The ID of an account that contains additional information about a branch. The value must be unique within this organization.
`BranchCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An identifier that relates this branch to an external system.
`BranchManagerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a user who is the manager or main point of contact for the branch unit.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date the branch most recently stopped being active.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the branch is currently active and can be used for banker assignments and automatic associations. The default value is 'false'.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a location where the branch does business.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description**
`OperatingHoursId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of an operating hours record that specifies the hours when the branch is open for normal business operations.
`OperationalState`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the operational readiness of a branch.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.

Field	Details
`ParentBranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this branch's parent branch unit, if it has one.
`ServiceTerritoryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a service territory that corresponds to this branch unit.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date the branch most recently became active.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the branch interaction type with customers. Possible values are: • `Physical`—The branch only operates at a physical location • `PhysicalAndVirtual`—Physical and Virtual • `Virtual`—The branch only operates as a virtual entity

BranchUnitBusinessMember

Represents a user or contact who can perform a specific role for a branch. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`BranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the branch unit associated with this assignment.
`BusinessUnitMemberId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** A user or contact with a predefined role that can be performed at this branch.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date that this person stopped fulfilling this role for this branch unit.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this role assignment can be used for this branch unit. The default value is 'false'.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of this branch unit business member assignment.
`ServiceTerritoryMemberId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a service territory member record for the same user who can be assigned to service appointments in a service territory.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date that this person was assigned this role for this branch unit.

BranchUnitCustomer

Represents a customer account that is assigned to or attributed to a branch unit. This object is available in API version 5`.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of a customer account associated with the branch.
`AssociationLevel`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates the branch's level of responsibility for managing the customer account. Possible values are: • `Primary` • `Secondary` The default value is 'Primary'.
`BranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The branch that is handling the associated customer account.
`LastInteractionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the customer account was associated with the branch.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the branch unit customer relationship.

BranchUnitRelatedRecord

Represents a record such as a case or account that is associated with or attributed to a branch unit. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a customer account associated with the related record.
`BranchUnitId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description The ID of the branch unit that's associated with the related record.
`BusinessUnitMemberId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the business unit member who was active at the branch when this association was made.
`Comment`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Comments about the relationship between the related record and the branch.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date when a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the branch unit related record association.
`Reason`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies a reason or rationale for associating the record with the branch.
`RelatedObjectName`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The object name or record type of the related record. Possible values are: • `Account` • `Lead`Lead and Referral
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the related record.

BusinessLicense

Represents the licenses of a party role like healthcare provider or producer.

Supported Calls

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

Fields

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

Field	Details
	Description ID of the organization holding the license.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who holds the license and is listed as a contact.
`Identifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Issuer's ID for the licensee.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the license is active.
`Issuer`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** License issuer's name.
`JurisdictionCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Country where license is valid.
`JurisdictionOther`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Name of other jurisdiction.
`JurisdictionState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** State where license is valid.
`JurisdictionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Jurisdiction for the license. Example values: • State • County • Province • Country
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`LicenseClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The class that the distributor's license belongs to. This field is available from API version 48.0 and later. Possible values are: • `Insurance Producer` • `Managing General Agent` • `Public Adjuster`
`LineOfAuthority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The line of authority that the distributor is licensed for. This field is available from API version 48.0 and later. Possible values are: • `Accident & Health or Sickness` • `Casualty` • `Property`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the business or professional license.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`PeriodEnd`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** License's expiration date.

Field	Details
`PeriodStart`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** License's effective start date.
`ResidenceStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Residence status of the producer. This field is available from API version 48.0 and later. Possible values are: • `Non-resident` • `Resident`
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Current status of the license. Example values: • Inactive • Revoked • Draft • Verified
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Person who holds the license and is listed as a user.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Current status for the license. Example values: • Authorized • Pending • Unverified
`VerifiedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** License was validated on this date.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

BusinessLicenseFeed
Feed tracking is available for the object.

BusinessLicenseHistory
History is available for tracked fields of the object.

BusinessLicenseOwnerSharingRule
Sharing rules are available for the object.

BusinessLicenseShare
Sharing is available for the object.

BusinessMilestone

Represents the milestones of a business, such as acquisition, market listing, and expansion. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
ExpirationDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the business milestone expired.
ExpirationDescription	**Type** textarea **Properties** Create, Nillable, Update **Description** The reason why the business milestone expired.
IsExpired	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the business milestone has expired. The default value is False.
IsTentative	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the exact date of the business milestone is not known. The default value is False.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MilestoneDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date on which the business milestone occurred.
`MilestoneDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the business milestone.
`MilestoneSiteId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the business milestone occurred. For example, the location where a business deal was won.
`MilestoneType`	**Type** picklist **Properties** Create, Filter, Group, Sort **Description** The type of the business milestone. Possible values are: • `Award` • `Bankruptcy` • `Executive Change` • `Expansion` • `Incorporation` • `Market Listing` • `Merger & Acquisition` • `New Funding`

Field	Details
	• `New Partnership` • `New Product Launch`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** An auto-generated number assigned to this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`PrimaryAccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The primary business account this business milestone is related to.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of this record in the source system. This field is unique within your organization.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

BusinessMilestoneFeed
Feed tracking is available for the object.

BusinessMilestoneHistory
History is available for tracked fields of the object.

BusinessProfile

Represents the insurance-related attributes for the insured business. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the account related to this business profile.
`ConsecWorkersCompCoverage`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of consecutive years for which the insured business had workers' compensation coverage.
`CreditTypesUsed`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The credit types used by the insured business.
`HasDishonoredPolicies`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the business has canceled policies, has not renewed policies, or has been denied policies in the past.
HasSufferedBankruptcy	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the business has reported any bankruptcies in the past.
HasUncorrectedSafetyViolations	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the business has any uncorrected safety violations.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.

Field	Details
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of this record in the source system. This field is unique within your organization.
WorkersCompClaims	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of workers' compensation claims raised.
WorkersCompMedicalClaims	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of workers' compensation medical claims raised.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

BusinessProfileFeed
Feed tracking is available for the object.

BusinessProfileHistory
History is available for tracked fields of the object.

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`.
`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:

Field	Details
	• 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.

CaseGatewayRequest

Holds the JSON output from the Financial Services Cloud flows and serves as an endpoint for integration with backend systems. It records the data interchange between the integrated systems.

Supported Calls

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

Fields

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the associated case.
`IntegrationPayload`	**Type** textarea

Field	Details
	Properties Create, Update **Description** The data payload for the integration, in JSON format. Here's an example. `{ "FlowName": "", "ServiceRequestNumber": "", "ServiceRequestId": "", "AccountId": "", "FinancialAccountId": "" }`
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated string assigned to this record.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.
`StatusCode`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The status code of the transmission.
`StatusMessage`	**Type** string

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The status of the transmission.

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.

Field	Details
APRType__c	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Annual percentage rate type. Valid values: • Fixed • Other • Variable
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

Field	Details
	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 **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

Field	Details
	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 **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

Field	Details
	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.

Claim

Represents the types of claims, such as life, auto, or home.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the claim.
`ActualAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual amount that was billed for the repair of damages.
`ApprovedAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The amount that was approved for the repair of damages based on an agent's inspection.
`AssessmentDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was officially assessed.
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the case that created the claim.
`ClaimReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for initiating the claim.
`ClaimReasonType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the claim reason belongs to. For example, natural disaster, accident.
`ClaimType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the claim. For example, home, auto, annuity, or life.
`EstimatedAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The estimated cost of damages given by the owner or the repair shop.
`FinalizedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was marked resolved, with claim status as approved or rejected.
`FnolChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The channel through which the loss was reported. Possible values are: • `Chatbot` • `Mobile` • `Phone` • `Web`
`IncidentSite`	**Type** address **Properties** Filter, Nillable **Description** The place where the accident took place. This is a compound field of type Address and combines these fields: IncidentSiteCity, IncidentSiteCountry, IncidentSiteGeocodeAccuracy, IncidentSiteLatitude, IncidentSiteLongitude, IncidentSitePostalCode, IncidentSiteState, and IncidentSiteStreet. For more information, see Address Compound Fields.
`InitiationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was initiated.

Field	Details
`InsuredAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the asset that is insured.
`IsAuthoritiesNotified`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the authorities have been informed about the accident. The default value is False.
`IsClosed`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the claim has been closed. The default value is False.
`IsDrivable`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the vehicle is drivable after the accident. The default value is False.
`IsInhabitable`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the property is inhabitable after the accident. The default value is False.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LossDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the accident took place.
LossType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the loss for which the claim was initiated. For example, partial loss, repair, replacement.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The claim number in the claims management system.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
PolicyNumberId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** ID of the parent insurance policy related to the claim.
`RenewalChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The channel through which the insurance policy associated with this claim was renewed. This field is deprecated in API version 48.0 and will be removed in API version 52 (the Summer '21 release). Possible values are: • `Chatbot` • `Mobile` • `Phone` • `Web`
`RepairShop`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the repair shop where the damaged vehicle was repaired.
`RepairShopLocation`	**Type** textarea **Properties** Create, Nillable, Update **Description** The location of the repair shop where the damaged vehicle was repaired.
`ReportDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp for when the accident report was filled out.

Field	Details
`ReportNumber`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The number of the accident report.
`ReportingAuthority`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the authority who filled out the accident report.
`Severity`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The severity of the claim. For example, high, medium, or low.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The status of the claim.

Field	Details
Summary	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the claim.
VisitDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp for when the agent visited the site of the accident or the place where the vehicle was moved after the accident.
VisitSite	**Type** textarea **Properties** Create, Nillable, Update **Description** The site that the agent visited.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ClaimFeed
Feed tracking is available for the object.

ClaimHistory
History is available for tracked fields of the object.

ClaimOwnerSharingRule
Sharing rules are available for the object.

ClaimShare
Sharing is available for the object.

ClaimCase

A junction object that associates the Claim object with the Case object. You see this object only if you have enabled the Use Many-to-Many Relationships org pref.

Supported Calls

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

Fields

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the case that was opened to handle this claim.
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the claim.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.

Field	Details
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ClaimCaseFeed
Feed tracking is available for the object.

ClaimCaseHistory
History is available for tracked fields of the object.

ClaimCoverage

Represents the insurance policy coverage for a claim. This object stores the information about financial activities related to the claim, including payouts and reserves. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The claim associated with this claim coverage.
`ClaimItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The item associated with the claim.
`ClaimParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim participant associated with this claim coverage.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the coverage for the claim.
`ExpenseReserveAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of expense reserve held for this claim coverage.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy asset associated with this claim coverage.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The insurance policy coverage associated with the claim.
`InternalReserveMode`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the rule for determining the loss reserve amount and expense reserve amount for the coverage of the claim. If the rule is Coverage Reserve, the reserve amounts are stored in the Loss Reserve and Expense Reserve fields of the Claim Coverage object. If the rule is Reserve Worksheet, the reserve amounts are stored in the Claim Coverage Reserve object. The values are added to and displayed in the Loss Reserve and Expense Reserve fields of the Claim Coverage object. Possible values are: • `CoverageReserve`—Coverage Reserve • `ReserveWorksheet`—Reserve Worksheet
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LossReserveAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of loss reserve held for a claim coverage.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the claim coverage.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of a claim coverage. Possible values are: • `Closed` • `Denied` • `Open`

ClaimItem

Represents claim items (such as collision damage, roadside assistance, rental care) and their coverage details. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`Category`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the category of the claim item. This field is available from API version 51.0 and later. Possible values are: • `Damaged Property` • `Involved Injury`
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The parent claim that includes this claim item.
`ClaimParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim participant associated with the claim item. This field is available from API version 51.0 and later.
`CurrentAddress`	**Type** address **Properties** Filter, Nillable **Description** The location of the claim item. This field is available from API version 51.0 and later. This is a compound field of type Address and combines these fields: City, Country, GeocodeAccuracy, Latitude, Longitude, PostalCode, State, and Street. For more information, see Address Compound Fields.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the claim item.

Field	Details
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy asset associated with the claim item. This field is available from API version 51.0 and later.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the coverage that covers this claim item.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the item that's included in the claim.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

ClaimItemFeed
Feed tracking is available for the object.

ClaimItemHistory
History is available for tracked fields of the object.

ClaimParticipant

A junction object that associates the Claim object with the Account object. This object represents the participants of a claim. Claim participants include insured, claimants, and witnesses.

Supported Calls

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

Fields

Field	Details
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the claim in which this participant has one or more roles.
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the insurance policy participant associated with this claim. This field is available from API version 51.0 and later.
`IsInjured`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the claim participant was injured in the accident. The default value is False.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`ParticipantAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the claim participant's account.
`ParticipantContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the claim participant's contact.
`Roles`	**Type** multipicklist **Properties** Create, Filter, Update **Description** The roles that the claim participant can have in the claim. For example, witness, victim, defendant, claimant.

Field	Details
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

ClaimParticipantFeed
Feed tracking is available for the object.

ClaimParticipantHistory
History is available for tracked fields of the object.

ClaimPaymentSummary

Represents the amount of money that's paid to a claimant or claim participant to cover a claim. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The ID of the claim associated with this claim payment.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the claim payment summary.
`PaymentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of the payment.
`PaymentDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the date when the claim payment was initiated.
`PaymentIdentifier`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** A unique identifier for the payment record assigned by the financial transaction system.
`PaymentStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the claim payment. Possible values are: • `Canceled` • `Paid` • `Pending Payment` • `Stopped`

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`.

Field Name	Details
`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 **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

Field Name	Details
	• 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
`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

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
`CountryOfResidence__c`	**Type** string

Field Name	Details
	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.
`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

Field Name	Details
	• 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 • 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

Field Name	Details
	• 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 • 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
`EmailVerified__c`	**Type** boolean

Field Name	Details
	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.
`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

Field Name	Details
	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 **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.

Field Name	Details
`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 **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.

Field Name	Details
	(`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: • 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

Field Name	Details
	• 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.
`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

Field Name	Details
	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 **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.

Field Name	Details
	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 • British Indian Ocean Territory • Brunei Darussalam • Bulgaria • Burkina Faso • Burundi • Cambodia

Field Name	Details
	• 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 • Ethiopia • Falkland Islands (Malvinas) • Faroe Islands • Fiji • Finland • France

Field Name	Details
	• 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 • Jamaica • Japan • Jersey • Jordan • Kazakhstan • Kenya

Field Name	Details
	• 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 • Morocco • Mozambique • Myanmar • Namibia • Nauru • Nepal

Field Name	Details
	• 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 • Samoa • San Marino • Sao Tome and Principe • Saudi Arabia • Senegal • Serbia

Field Name	Details
	• 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 • Turks and Caicos Islands • Tuvalu • Uganda • Ukraine • United Arab Emirates • United Kingdom

Field Name	Details
	• 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 **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

Field Name	Details
	• 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 • Indonesian • Inuktitut • Irish (Gaelic) • Italian • Japanese • Javanese

Field Name	Details
	• 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 • Polish • Portuguese • Quenya • Rapa Nui • Romanian • Russian

Field Name	Details
	• 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
`ReferredByContact__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact referring this individual.

Field Name	Details
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.
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

Field Name	Details
	• 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 • Cuba

Field Name	Details
	• 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 • Haiti

Field Name	Details
	• 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 • Malaysia

Field Name	Details
	• 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 • Poland

Field Name	Details
	• 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 • Switzerland

Field Name	Details
	• 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
`SecondaryLanguage__c`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** This individual's secondary language. Valid values:

Field Name	Details
	• 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 • Esperanto • Estonian • Ewe • Fiji Hindi • Filipino

Field Name	Details
	• 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 • Low German • Lower Sorbian • Macedonian • Malay • Malayalam

Field Name	Details
	• 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 • Telugu • Thai • Tok Pisin • Turkish • Twi

Field Name	Details
	• Ukrainian • Upper Sorbian • Urdu • Uzbek • Venetian • Vietnamese • Vilamovian • Võrro • Welsh • Xhosa • Yiddish • Zazaki
`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%

Field Name	Details
	• 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 **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

Field	Details
	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 **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

Field	Details
	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.
`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.

CoverageType

Represents the type of coverage, such as liability, earthquake, or collision damage. You see this object only if you have enabled the Access Master List of Coverage Types org pref.

Supported Calls

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

Fields

Field	Details
`BenefitPaymentFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the payment if the benefit or coverage entails a recurring payout to the insured.
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the coverage belongs to. For example, benefit, clause, deductible, rider.
`CategoryCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A carrier-specific code that identifies the coverage. For example, benefit, clause, or deductible.
`CategoryGroup`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The specific category group. For example, for a liability coverage record, benefit is the category and liability is the category group.

Field	Details
`CategoryGroupType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the category group.
`CategoryGroupTypeValue`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Identifies the coverage limit type. For example, for a liability coverage of USD 1000 per person and USD 1500 per occurrence, Amount per Person and Amount per Occurrence are the category group type values.
`CoverageCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A carrier-specific code that identifies the policy limit code in the source system.
`DeathBenefitOptionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The method for the payment of death benefit.
`DeductibleAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The deductible amount that the customer must pay.
`Description`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description The description of the coverage type.
`Discount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The discount that was given on the coverage or the benefit.
`EffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the coverage is in effect.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the coverage expires.
`IncomeOptionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the income option given to the policy participant. For example, periodic payment is an income option type, and annuity is an income option.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LimitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The limit of the fixed coverage amount. For example, uninsured motorist coverage of USD 1000.
`LimitDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which the coverage limit is in effect. For example, an annuity benefit is valid only after the insured is 60 years old.
`LimitPercentage`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the actuals covered by this coverage.
`LimitRange`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The range of the coverage limit. For example, bodily injury coverage with limits as USD 100,000 per person and USD 300,000 per accident.
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description An auto-generated number assigned to this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`PremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium paid by the customer for this coverage.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this coverage record in the source system.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

CoverageTypeFeed
Feed tracking is available for the object.

CoverageTypeHistory
History is available for tracked fields of the object.

CoverageTypeOwnerSharingRule
Sharing rules are available for the object.

CoverageTypeShare
Sharing is available for the object.

CustomerProperty

Represents the insurable and insured properties of a customer.

Supported Calls

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

Fields

Field	Details
`Address`	**Type** address **Properties** Filter, Nillable **Description** The location of the property. This is a compound field of type Address and combines these fields: City, Country, GeocodeAccuracy, Latitude, Longitude, PostalCode, State, and Street. For more information, see Address Compound Fields.
`AnnualMileage`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The distance that the vehicle is expected to be driven in a year.
`AssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the asset associated with this customer property.
`BathroomCount`	**Type** double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The total number of bathrooms in the property.
`BedroomCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total number of bedrooms in the property.
`BuiltUpArea`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The property's usable area, which is also known as the carpet area.
`CeilingType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the ceiling the property has. For example, conventional, beam, shed, cove, tray, suspended.
`ConstructionClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the property's construction. For example, framed, masonry non-combustible, modified, semi-resistive, or fire resistive.
`DaysDrivenTowork`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of days that the vehicle was used to drive to work.

Field	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the asset.
`DwellingType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The property's dwelling type on the policy creation date. For example, ranch, single family, or condo.
`EngineDisplacementVolume`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The engine capacity of the vehicle.
`FactoryPrice`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The price of the vehicle billed by the manufacturer.
`FairMarketValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The estimated market price of the vehicle on the policy creation date.
`FinancingType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The type of financing used to purchase the asset.
`FloorCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of stories in the property.
`FloorType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the floor the property had on the policy creation date. For example, ceramic tile, porcelain tile, floating wood tile.
`FoundationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the property's foundation. For example, pier and beam, slab.
`FuelType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The fuel system of the vehicle.
`GarageSpaceCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of parking spaces available in the property.
`GarageType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The type of the garage the property has.
`GrossVehicleWeight`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's weight.
`IsBasementIncluded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the property has a basement. The default value is False.
`IsChimneyIncluded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the property has a chimney. The default value is False.
`IsPassedSmogCheck`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the vehicle has passed the smog check. The default value is False.
`IsSwimmingPoolIncluded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the property has a swimming pool. The default value is False.
`KitchenCount`	**Type** double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The total number of kitchens in the property.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LeasePeriod	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current lease period for the property.
LienHolderName	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The bank or the financial firm that legally owns the asset.
LoadCapacity	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's load-carrying capacity.

Field	Details
LotArea	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The total area of the plot on which the property is constructed, including the construction area and the open area on all sides.
Make	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The brand of the vehicle.
MakeYear	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The year in which the vehicle was manufactured.
MilesDrivenToWork	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of miles that the vehicle covered when it was used to drive to work.
ModelName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The model name of the vehicle.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort

Field	Details
	Description An auto-generated number assigned to this record.
`OdometerReading`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's odometer reading on the policy creation date.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`PassengerSeatCapacity`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The legal seating capacity of the vehicle.
`PrimaryOwnerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the primary owner of the asset.
`PrimaryUse`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** What the vehicle is primarily going to be used for.
`PurchaseDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date on which this property was purchased.
PurchasePrice	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of money paid by the owner to purchase this property.
RegistrationNumber	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Vehicle's license plate number.
RegistrationType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's registration type. For example, antique, combo, apportioned, commercial.
RoofType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the roof the property has.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this property record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The ID of this property record in the source system.
`TransmissionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The transmission type of the vehicle.
`Vin`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Vehicle's identification number.
`YearBuilt`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The year in which the property was constructed.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

CustomerPropertyFeed
Feed tracking is available for the object.

CustomerPropertyHistory
History is available for tracked fields of the object.

CustomerPropertyOwnerSharingRule
Sharing rules are available for the object.

CustomerPropertyShare
Sharing is available for the object.

DistributorAuthorization

Represents the official authorization from an insurance company granting a distributor the permission to act as its agent. This object is available in API version 48.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the distributor's business account.
`AuthorizedInsuranceLineId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance line that the insurance company is authorized to sell.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the contact associated with the producer.
`EffectiveDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this authorization is in effect.
`ExpirationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this authorization expires.

Field	Details
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the authorization is active (true) or inactive (false). The default value is false.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LicenseId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The distributor's business license against which the distributor is authorized.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-number identifier for this distributor authorization.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The ID of the record owner.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The authorization status of the distributor. Possible values are: • `Appointed` • `Terminated`
`TerminationCause`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for the termination of the distributor's authorization.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

DistributorAuthorization
Feed tracking is available for the object.

DistributorAuthorization
History is available for tracked fields of the object.

DistributorAuthorization
Sharing rules are available for the object.

DistributorAuthorization
Sharing is available for the object.

DocumentChecklistItem

Represents a checklist item for a file documentation upload. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
AccountId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the account the document checklist item belongs to.
DocumentTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the document type for the document checklist item.
Instruction	**Type** textarea **Properties** Create, Nillable, Update **Description** Instructions associated with the document checklist item.
IsAccepted	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the file has been accepted. The default value is False.
IsFrozen	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the item can no longer be modified. The default value is False.
IsRequired	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort

Field	Details
	Description Indicates if the document checklist item is required. The default value is False.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the document checklist item.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
ParentRecordId	**Type** reference **Properties** Create, Filter, Group,, Sort, Update **Description** Original parent object the document checklist item belonged to.
Status	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Uploaded document checklist item status. Possible values are: • `Accepted` • `New` • `Pending` • `Rejected` The default value is New.
`UploadedById`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** Person who uploaded the file.
`WhoId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Person that the uploaded documentation pertains to.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

DocumentChecklistItemFeed
Feed tracking is available for the object.

DocumentChecklistItemHistory
History is available for tracked fields of the object.

DocumentChecklistItemOwnerSharingRule
Sharing rules are available for the object.

DocumentChecklistItemShare
Sharing is available for the object.

DocumentType

Represents the type of file being uploaded or attached. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Document type description.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance may slow while Salesforce generates one for each record.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the document type is active.
`Language`	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the document type.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The label for the picklist value that appears in the UI.

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

Field	Details
	• 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

Field	Details
	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 **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

Field	Details
	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 • 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

Field	Details
	• 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

Field Name	Details
	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 **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

Field	Details
	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.
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

Field	Details
	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.
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

Field	Details
	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 **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.

Field	Details
`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
`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)

Field	Details
	• 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
`HardwareSerial__c`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The serial number of hardware associated with the account.
`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.
`IncomingVolume__c`	**Type** double **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The volume of transactions coming in through the service.
`InsuredAmount__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The insured value that an insurance policy covers.
`InsurancePolicy__c`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy associated with this financial account.
`InterestRate__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest rate as a percent.
`InvestmentObjectives__c`	**Type** multipicklist

Field	Details
	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 **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

Field	Details
	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 **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.

Field	Details
`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.
`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.

Field	Details
`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.
`OutgoingVolume__c`	**Type** double **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The volume of transactions going out through the service.
`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.
`OverdraftProtection__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the customer accepts overdraft protection and its associated fees.
`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 **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

Field	Details
	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.
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

Field	Details
	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.
`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

Field	Details
	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.
`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

Field	Details
`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.
`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

Field	Details
	Description Custodian or recordkeeper of this financial account.
`ServiceType__c`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The type of service undertaken.
`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 **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of this financial account. Valid values:

Field	Details
	• Open • Closed • On Hold • Pending
`TargetLimit__c`	**Type** double **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The limit on items or value that the service processes.
`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

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **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 **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

Field	Details
	Description Name of the financial account role.
`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

Field	Details
`SourceSystemId__c`	**Type** string **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

Field	Details
	Description Billing statement record associated with the account.
CardAccountID__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Card number linked to the transaction.
Claim__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim associated with the financial account 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.
InsurancePolicy__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy associated with the financial account transaction.
MerchantCategoryCode__c	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	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.
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

Field	Details
	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 **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.

Field	Details
`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.
`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.

Field	Details
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.
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.

Field	Details
`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 **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 **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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Major category of asset type. Valid values: • Equities • Fixed Income • Cash Equivalents • Alternative Investments
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

Field	Details
	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, **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

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Percent change in value since purchase.
`Price__c`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **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

Field	Details
	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 **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.

Field	Details
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 • 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

Field	Details
	• 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 • 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

Field	Details
	• 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 • Ethiopia • Falkland Islands (Malvinas) • Faroe Islands • Fiji • Finland • France • French Guiana • French Polynesia • French Southern Territories • Gabon • Gambia • Georgia • Germany • Ghana • Gibraltar

Field	Details
	• 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 • 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

Field	Details
	• 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 • Morocco • Mozambique • Myanmar • Namibia • Nauru • Nepal • Netherlands • New Caledonia • New Zealand • Nicaragua • Niger • Nigeria • Niue • Norfolk Island • Norway

Field	Details
	• 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 • 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

Field	Details
	• 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 • 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

Field	Details
	• 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.
`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.

IdentityDocument

Represents information about documents used to identify Financial Services Cloud clients.

Supported Calls

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

Fields

Field	Details
`ExpirationDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Date when the document expires.
`IdDocumentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of the document that's used to verify the client's identity.
`IssueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when the document was issued.
`IssuingAuthority`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The authority that issued the document.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the document.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created this record.
`RelatedLegalEntityId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the legal entity related to this document.
`VerifiedById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the person who verified this document.
`VerifiedOn`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date when this 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.
`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.

Field	Details
VerifiedOn__c	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date the client's identity was verified.

InsuranceClaimAsset

A junction object that associates the Claim object with the InsurancePolicyAsset object. You see this object only if you have enabled the Use Many-to-Many Relationships org pref.

Supported Calls

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

Fields

Field	Details
ClaimId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the originating claim.
InsurancePolicyAssetId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the asset associated with this claim.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

InsuranceClaimAssetFeed
Feed tracking is available for the object.

InsuranceClaimAssetHistory
History is available for tracked fields of the object.

InsurancePolicy

Represents the type of insurance policy, such as auto, home, life, or annuity.

Supported Calls

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

Fields

Field	Details
`AuditTerm`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the audit. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.
`CancellationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the insurance policy was canceled.
`CancellationReason`	**Type** textarea **Properties** Create, Nillable, Update **Description** The reason for canceling the insurance policy.
`CancellationReasonType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the cancellation reason belongs to.

Field	Details
CashSurrenderValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The cash surrender value of the insurance policy.
ChangeSubtype	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A further categorization of the change type. For example, childbirth, marriage.
ChangeType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the change in the policy. For example, life event, house renovation.
DateRenewed	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the policy was last renewed.
Discount	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The discount that was given on the policy.
EffectiveDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the policy is in effect.

Field	Details
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the policy expires.
`FinalRenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The final date on which the policyholder can renew the insurance policy.
`FnolChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The channel through which the loss for the claim associated with this policy was reported. This field is deprecated in API version 48.0 and will be removed in API version 52 (the Summer '21 release). Possible values are: • `Chatbot` • `Mobile` • `Phone` • `Web`
`GrossWrittenPremium`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total expected premium amount for the insurance policy over the policy period.
`HasAnyAutoCoverage`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the insurance policy has an Any Auto coverage, which extends the coverage to hired and other non-owned vehicles. The default value is False.
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the policy is active. The default value is False.
`IsLoanEligibile`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a loan can be requested against the insurance policy. The default value is False.
`IsRenewedPolicy`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the policy is a renewed policy. The default value is False.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The insurance policy number.
`NameInsuredId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The name of the primary insured.
`OriginalEffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the original policy went into effect. This field is available from API version 51.0 and later.
`OriginalExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Expiration date of the original policy. This field is available from API version 51.0 and later.
`OriginalPolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the original insurance policy. This field is available from API version 51.0 and later.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description ID of the record owner.
`PaidToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date up to which the policy is paid for. This field is available from API version 51.0 and later.
`ParentPolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the parent policy that covers this policy. For example, a parent policy can cover an auto policy and home policy.
`PaymentDueDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the next payment of the premium is due.
`PlanTier`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The class that the insurance policy belongs to. For example, silver, gold, or platinum.
`PlanType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the insurance policy plan. For example, single life, joint last-to-die, or joint first-to-die (primarily applicable for term insurance).

Field	Details
`PolicyDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the insurance policy.
`PolicyName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the insurance policy.
`PolicyTerm`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The time period for which the policy provides coverage. This field is available from API version 51.0 and later. Possible values are: • `Annual` • `Custom` • `Daily` • `Monthly` • `Semi-Annual`
`PolicyType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the insurance policy. For example, home, auto, annuity, or life.
`PremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium paid by the policy owner for the current billing period.

Field	Details
`PremiumCalculationMethod`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The premium calculation method for a payment period. This field is available from API version 51.0 and later. Possible values are: • `Daily` • `Modal`
`PremiumFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the premium payment or billing. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.
`PremiumPaymentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of premium payment, such as Advance or Arrears. This field is available from API version 51.0 and later. Possible values are: • `Advance` • `Arrears`
`PreviousPremium`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium of the policy before it was renewed.
`PreviousRenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date on which the insurance policy was renewed in the last renewal cycle.
`PriorPolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the insurance policy before it was renewed.
`ProducerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the agency or the agent who sold the policy.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product that this policy belongs to. For example, if the customer buys a silver auto policy, this field looks up to the silver auto product in the Product object.
`RenewalChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The channel through which the insurance policy was renewed. Possible values are: • `Chatbot` • `Mobile` • `Phone` • `Web`
`RenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date on which the policy is expected to be renewed. The actual renewal date may be different.
`SaleDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the policy was sold.
`ServicingOffice`	**Type** address **Properties** Filter, Nillable **Description** The address of the office that issued the policy and that services the policy. This is a compound field of type Address and combines these fields: ServicingOfficeCity, ServicingOfficeCountry, ServicingOfficeGeocodeAccuracy, ServicingOfficeLatitude, ServicingOfficeLongitude, ServicingOfficePostalCode, ServicingOfficeState, and ServicingOfficeStreet. For more information, see Address Compound Fields.
`SourceOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the opportunity from which the policy was created.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of this record in the source system.

Field	Details
StandardFeeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
StandardPremiumAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
StandardTaxAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.
Status	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The status of the insurance policy.
Substatus	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The carrier system's substatus code for the insurance policy.
TaxesSurcharges	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The taxes and surcharges levied on the premium for the insurance policy.
`TermFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TotalStandardAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.
`TotalSumInsured`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total insured amount. This field is available from API version 51.0 and later.

Field	Details
UnderwritingEntityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Legal entity that underwrote the insurance policy.
UniversalPolicyNumber	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** A number that uniquely identifies the policy across different source systems.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

InsurancePolicyFeed
Feed tracking is available for the object.

InsurancePolicyHistory
History is available for tracked fields of the object.

InsurancePolicyOwnerSharingRule
Sharing rules are available for the object.

InsurancePolicyShare
Sharing is available for the object.

InsurancePolicyAsset

Represents the customer property insured through the insurance policy.

Supported Calls

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

Fields

Field	Details
AssetName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insured customer property. This field is available from API version 51.0 and later.
CustomerPropertyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the insured customer property.
InsurancePolicyId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the insurance policy that covers this customer property.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort

Field	Details
	Description An auto-generated number assigned to this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`PrimaryPolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the primary participant on the insurance policy. This field is available from API version 51.0 and later.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.
`StandardFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardPremiumAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
StandardTaxAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.
TermFeeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
TermPremiumAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
TermTaxAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
TotalStandardAmount	**Type** currency **Properties** Filter, Nillable, Sort

Field	Details
	Description The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.
`TotalTermAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the expected premium, tax, and fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later. This is a calculated field.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

InsurancePolicyAssetFeed
Feed tracking is available for the object.

InsurancePolicyAssetHistory
History is available for tracked fields of the object.

InsurancePolicyAssetOwnerSharingRule
Sharing rules are available for the object.

InsurancePolicyAssetShare
Sharing is available for the object.

InsurancePolicyCoverage

A junction object that associates the InsurancePolicy object with the ProductCoverage object.

Supported Calls

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

Fields

Field	Details
`BenefitPaymentFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the payment if the benefit or coverage entails a recurring payout to the insured. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the coverage belongs to. For example, benefit, clause, deductible, rider.
`CategoryCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A carrier-specific code that identifies the coverage. For example, benefit, clause, or deductible.
`CategoryGroup`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The specific category group. For example, for a liability coverage record, benefit is the category and liability is the category group.
`CategoryGroupType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the category group.
`CoverageName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name of the coverage.
`CoverageTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the coverage type. This field is available only if the Access Master List of Coverage Types option is enabled.
`DeathBenefitOptionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The method for the payment of death benefit.
`DeductibleAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The deductible amount that the customer must pay.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the coverage.
`Discount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The discount that was given on the coverage or the benefit.

Field	Details
`EffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the coverage is in effect.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the coverage expires.
`IncomeOptionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the income option given to the policy participant. For example, periodic payment is an income option type, and annuity is an income option.
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The asset covered by this coverage.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy associated with this coverage.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LimitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The limit of the fixed coverage amount. For example, uninsured motorist coverage of USD 1000.
`LimitDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which the coverage limit is in effect. For example, an annuity benefit is valid only after the insured is 60 years old.
`LimitPercentage`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the actuals covered by this coverage.
`LimitRange`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The range of the coverage limit. For example, bodily injury coverage with limits as USD 100,000 per person and USD 300,000 per accident.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`PremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium paid by the customer for this coverage.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this coverage record in the source system.
`StandardFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.
`TermFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TotalStandardAmount`	**Type** currency **Properties** Filter, Nillable, Sort

Field	Details
	Description The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

InsurancePolicyCoverageFeed
Feed tracking is available for the object.

InsurancePolicyCoverageHistory
History is available for tracked fields of the object.

InsurancePolicyMemberAsset

A junction object that associates the InsurancePolicyAsset object with the InsurancePolicyParticipant object. You see this object only if you've enabled the Use Many-to-Many Relationships org pref.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the insured asset.
`InsurancePolicyId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the insurance policy associated with the asset. This field is available from API version 51.0 and later.

Field	Details
InsurancePolicyParticipantId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the insured policy participant.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The ID of this record in the source system.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

InsurancePolicyMemberAssetFeed
Feed tracking is available for the object.

InsurancePolicyMemberAssetHistory
History is available for tracked fields of the object.

InsurancePolicyParticipant

A junction object that associates the InsurancePolicy object with the Account object. This object represents the participants of an insurance policy. Insurance policy participants include policy owners and beneficiaries.

Supported Calls

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

Fields

Field	Details
`BeneficiarySharePercentage`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the total benefits that goes to the nominee.
`EffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the participant is active on the policy.
`ExpirationDate`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The date from which the participant is inactive on the policy.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the insurance policy.
`IsActiveParticipant`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the participant is an active participant on the policy. The default value is False.
`IsMinorBeneficiary`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the nominee is a minor. The default value is False.
`IsPolicyholder`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this client owns the policy or is just a participant on the policy. This field is available from API version 51.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LegalGuardianId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The legal guardian of the minor beneficiary. This can be a business account or a person account.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
PrimaryParticipantAccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the primary participant's account.
PrimaryParticipantContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the primary participant's contact.
RelatedParticipantAccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The ID of the related participant's account.
RelatedParticipantContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the related participant's contact.
RelationshipToInsured	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The relationship of the nominee with the insured.
Role	**Type** multipicklist **Properties** Create, Filter, Update **Description** The roles that the participant has in the policy. For example, owner, beneficiary, driver.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.
StandardFeeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The expected fee for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period. This field is available from API version 51.0 and later.
`StandardTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period. This field is available from API version 51.0 and later.
`TermFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TermTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The expected tax on the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later.
`TotalStandardAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the expected premium, fee, and tax for the policy over the policy period. This field is available from API version 51.0 and later. This is a calculated field.
`TotalTermAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the expected premium, tax, and fee for the policy over the policy period, prorated based on the policy's effective dates. This field is available from API version 51.0 and later. This is a calculated field.

Associated Objects

This object has the following associated objects. Unless noted, they're available in the same API version as this object.

InsurancePolicyParticipantFeed
Feed tracking is available for the object.

InsurancePolicyParticipantHistory
History is available for tracked fields of the object.

InsurancePolicySurcharge

Represents the charges calculated for an insurance policy and its related assets, coverages, and participants in a region. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicableObjectType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the item on which the surcharge was applied. Possible values are: • `InsurancePolicyAsset`—Insurance Policy Asset • `InsurancePolicyCoverage`—Insurance Policy Coverage • `InsurancePolicyParticipant`—Insurance Policy Participant
`InsurancePolicyAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy asset associated with the surcharge.
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy coverage associated with the surcharge.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy associated with the surcharge.
`InsurancePolicyParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy participant associated with the surcharge.

Field	Details
InsurancePolicyTransactionId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy transaction associated with the surcharge.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the insurance policy surcharge.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the system from which this insurance policy surcharge was obtained.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description The ID of the insurance policy surcharge record in the source system. This field is unique within your organization.
`SurchargeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The surcharge amount calculated for an insurance policy, insurance policy asset, insurance policy coverage, or an insurance policy participant. This surcharge is calculated based on the tax and fee structure defined for products or can be retrieved from a source system.

InsurancePolicyTransaction

Represents a transaction related to a change that affects the premium of an insurance policy, such as an endorsement, renewal, or cancellation. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy this transaction is related to.
`InsurancePolicyVersionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current version of the insurance policy.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the transaction.
ParentTransactionId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The transaction this insurance policy transaction is related to. For example, a charge transaction is the parent transaction for a payment made against that charge.
TotalTransactionAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** The total amount of transaction, including transaction fee and tax. This is a calculated field.
TransactionAmount	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The transaction amount.
`TransactionEffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date of the transaction.
`TransactionFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The prorated fee for the transaction.
`TransactionNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An identifier for the transaction from an external system.
`TransactionPostedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the amount was charged to the customer.
`TransactionTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The prorated tax on the transaction amount.
`Type`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of transaction. Possible values are: • `Cancellation` • `Credit` • `Deposit` • `Endorsement` • `Loan` • `Premium Payment` • `Renewal` • `Surcharge` • `Surrender` • `Withdrawal`

InsuranceProfile

Represents the insurance-related attributes for the insured member.

Supported Calls

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

Fields

Field	Details
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the contact related to this insurance profile.
`IsAlcoholAbuser`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person has a history of alcohol abuse. The default value is False.
`IsAlcoholConsumer`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person consumes alcohol. The default value is False.
`IsDrugAbuser`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person has a history of drug abuse. The default value is False.
`IsGoodDriver`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person is categorized as a good driver. The default value is False.
`IsGoodStudent`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person is categorized as a good student. The default value is False.
`IsHighRiskOccupation`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person's current employment is a high-risk job. The default value is False.

Field	Details
IsLicenseSuspended	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the insured member's driver's license was ever suspended. The default value is False.
IsTobaccoConsumer	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person consumes tobacco. The default value is False.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
MajorCitationCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of major citations the person had when the policy was created.
MinorCitationCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The number of minor citations the person had when the policy was created.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`NumberOfAccidents`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of accidents the insured member was involved in.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

InsuranceProfileFeed
Feed tracking is available for the object.

InsuranceProfileHistory
History is available for tracked fields of the object.

Interaction

Represents an interaction (phone call, in-person meeting, or video conference) between two or more people (attendees), typically including at least one representative and one customer or partner. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the customer or partner who attended the interaction.
`EndTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time that the interaction ended.
`InteractionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of interaction. Possible values are: • `Conference` • `Email` • `In Person` • `Phone Call`
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location of the interaction.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the interaction.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`StartTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time that the interaction started.

InteractionAttendee

Represents an attendee of an interaction. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AttendeeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of attendee. Possible values are: • `External` • `Internal`
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact who attended the interaction.
`EventId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The event on Salesforce calendar for this attendee.
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The interaction for which this attendee record is created.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the interaction attendee.
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user who attended the interaction.

InteractionSummary

Represents the summary of an interaction, including confidentiality information. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the customer who attended the client interaction.
`ConfidentialityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the level of confidentiality of the information that's recorded in this interaction summary. Possible values are: • `Confidential` • `Public`
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The client interaction related to the interaction summary.
`InteractionPurpose`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the purpose of the client interaction. Possible values are: • `Deal Execution` • `Meet and Greet` • `Quarterly Check-In`
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MeetingNotes`	**Type** textarea **Properties** Create, Nillable, Update **Description** The detailed record of what transpired during the client interaction.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The title of the interaction summary, capturing the summary of the interaction.
`NextSteps`	**Type** textarea **Properties** Create, Nillable, Update **Description** The next steps that were decided during the interaction.
`Offering`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** The offerings that were discussed in the client interaction. Possible values are:

Field	Details
	• `Debt Capital Markets` • `Equity Capital Markets` • `Mergers and Acquisitions Advisory`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`PartnerAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the partner who attended the client interaction.
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the record such as an opportunity associated with a client interaction.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the interaction summary. Possible values are: • `Draft` • `Published`

InteractionSummaryParticipant

Represents a user with whom an interaction summary is shared. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes about this participant.
`InteractionSummaryId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The interaction summary that's shared with this user.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this participant is active.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the interaction summary participant.
ParticipantId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The user or group that the interaction summary is shared with.
ParticipantRoleId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The role assigned to this participant.

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 **Description** Indicates whether the user contact was converted from this lead.
CreatedFromLead__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field Name	Details
	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 **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the household record associated with the lead record.
`PotentialValue__c`	**Type** currency

Field Name	Details
	Properties Filter, Nillable, Sort **Description** Potential value from converting the lead.
`ProductInterest__c`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lead's area of interest. This field is deprecated. Use the `ExpressedInterest__c` field instead.
`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.

LoanApplicant

Represents details of the borrower or co-borrower for the loan application. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicantExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable).
`AsianRaceSubType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Borrower's Asian race. Possible values are: • `Asian Indian` • `Chinese` • `Filipino` • `Japanese` • `Korean` • `Other` • `Vietnamese`
`BorrowerType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Applicant's borrower type. Values are: • `Borrower` • `CoBorrower`

Field	Details
`CitizenshipStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's citizenship status. Possible values are: • `Non-Permanent Resident Alien` • `Permanent Resident Alien` • `U.S. Citizen`
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Contact associated with this borrower.
`DependentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's number of dependents.
`DependentsAge`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Ages of borrower's dependents in a comma-separated list.
`EthnicitySubType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Borrower's ethnicity origin. Possible values are: • `Cuban`

Field	Details
	• Mexican • Other • Puerto Rican
EthnicityType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's ethnicity. Possible values are: • Hispanic or Latino • I do not wish to provide this information • Not Hispanic or Latino
GenderType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's gender. Possible values are: • Female • I do not wish to provide this information • Male
HasMilitaryService	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the borrow is serving in the United States Armed Forces or the borrower or the borrower's deceased spouse served in the past.
IsActiveMilitary	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is currently on active duty with the United States Armed Forces.

Field	Details
IsJointCredit	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is applying for joint credit.
IsSurvivingMilitarySpouse	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is a surviving spouse of a veteran.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LoanApplicationId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Loan application associated with this borrower.
MaritalStatus	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Borrower's marital status. Possible values are: • `Married` • `Separated` • `Unmarried`
`MilitaryTourExpirationMonth`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Month that borrower's tour of service expires.
`MilitaryTourExpirationYear`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Year that borrower's tour of service expires.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan applicant.
`OtherAsianRaceSubType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's Asian race if other is specified.
`OtherEthnicitySubType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's ethnicity if other is selected.

Field	Details
`OtherPacIslandSubType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's native Hawaiian or Pacific Islander race if other is specified.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
`PacIslandSubType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Borrower's native Hawaiian or Pacific Islander race. Possible values are: • `Guamanian or Chamorro` • `Native Hawaiian` • `Other` • `Samoan`
`PreferredLanguage`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's preferred communication language. Possible values are: • `Chinese` • `English` • `I do not wish to respond` • `Korean` • `Other` • `Spanish` • `Tagalog`

Field	Details
	• `Vietnamese`
`RaceType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Borrower's race. Possible values are: • `American Indian or Alaska Native` • `Asian` • `Black or African American` • `I do not wish to provide this information` • `Native Hawaiian or Other Pacific Islander` • `White`
`TribeName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of borrower's enrolled or principal tribe.
`WasActiveMilitary`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is currently retired, discharged, or separated from active military duty.
`WasNonActivatedService`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicantFeed
Feed tracking is available for the object.

LoanApplicantHistory
History is available for tracked fields of the object.

LoanApplicantOwnerSharingRule
Sharing rules are available for the object.

LoanApplicantShare
Sharing is available for the object.

LoanApplicantAddress

Represents borrower's or co-borrower's current address information. This object is available in API version XX.0 and later.

Supported Calls

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

Fields

Field	Details
`AddressExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`AddressOwnership`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies borrower's status at residence. Possible values are: • `Live Rent-Free` • `Own` • `Rent`

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. Possible values are: • `EUR`—Euro • `INR`—Indian Rupee • `USD`—U.S. Dollar
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LoanApplicantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Borrower associated with this applicant address.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Loan application associated with this applicant address.

Field	Details
MonthlyRentPayment	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly rent payment (if applicable).
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the borrower’s address.
ResidenceAdditionalMonthCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Additional months borrower lived at this residence.
ResidenceAddress	**Type** address **Properties** Filter, Nillable **Description** Residence's physical address.
ResidenceCity	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address city.
ResidenceCountry	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address country.

Field	Details
`ResidenceGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
`ResidenceLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
`ResidenceLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
`ResidencePostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address postal code.
`ResidenceState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address state.
`ResidenceStreet`	**Type** textarea

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The address street.
`ResidenceYearCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Years borrower lived at this residence.
`ResidencyType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies borrower's residency status at address. Possible values are: • `Former Residence` • `Mailing Address` • `Present Address`

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicantAddressFeed
Feed tracking is available for the object.

LoanApplicantAddressHistory
History is available for tracked fields of the object.

LoanApplicantAsset

Represents a junction between a borrower and a loan application asset. This object is available in API version 47.0 and later.

Supported Calls

`create()`, `delete()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `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. Possible values are: • `EUR`—Euro • `INR`—Indian Rupee • `USD`—U.S. Dollar
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LoanApplicantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the borrower associated with the asset.
`LoanApplicationAssetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the loan application associated with the asset.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.
`Role`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Identifies borrower's ownership role for the asset. Possible values are: • `Co-Holder` • `Primary` The default value is Co-Holder.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicantAssetHistory
History is available for tracked fields of the object.

LoanApplicantDeclaration

Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`BankruptcyType`	**Type** multipicklist

Field	Details
	Properties Create, Filter, Nillable, Update **Description** Bankruptcy type or types (if applicable). Possible values are: • `Chapter 11` • `Chapter 12` • `Chapter 13` • `Chapter 7`
`BorrowedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount of money borrowed for loan application transaction.
`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. Possible values are: • `EUR`—Euro • `INR`—Indian Rupee • `USD`—U.S. Dollar
`DeclarationExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`HasBorrowedMoney`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether borrower is borrowing money for loan application transaction.
`HasDeclaredBankruptcy`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower declared bankruptcy within the past seven years.
`HasDeedSurrender`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower conveyed title to a property in lieu of foreclosure in past 7 years.
`HasOutstandingJudgement`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether there are one or more outstanding judgments against the borrower.
`HasOwnershipInterest`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower had ownership interest in a property in the last 3 years.
`HasPastShortSale`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past 7 years.
`HasPropertyForeclosed`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower had property foreclosed upon in last 7 years.
`HasUndisclAddlCreditApp`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.
`HasUndisclAddlPropApp`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.
`IsCoSignerUndisclDebt`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.
`IsPartyToLawsuit`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is party to lawsuit with potential personal financial liability.
`IsPresentlyDelinquent`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.
`IsPrimaryResidence`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether property to be borrower's primary residence.
`IsRelatedToSeller`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).
`IsSubjectToPriorityLien`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether application property is to have a priority clean energy lien like Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`LoanApplicantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the borrower making these declarations.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with these declarations.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application declaration.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
`PriorPropertyTitleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies how borrower held title in the ownership interest property. Possible values are: • `Joint With Other Than Spouse` • `Joint With Spouse` • `Yourself`
`PriorPropertyUsageType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Identifies type of property borrower held ownership interest in. Possible values are: • `Investment Property` • `Primary Residence` • `Second Home` • `Secondary Residence`

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicantDeclarationFeed
Feed tracking is available for the object.

LoanApplicantDeclarationHistory
History is available for tracked fields of the object.

LoanApplicantDeclarationOwnerSharingRule
Sharing rules are available for the object.

LoanApplicantDeclarationShare
Sharing is available for the object.

LoanApplicantEmployment

Represents details about the borrower's or co-borrower's current and past employment. This object is available in API version 47.0 and later.

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

Field	Details
	Description If multiple currencies is enabled, contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `INR`—Indian Rupee • `USD`—U.S. Dollar
`CurrentJobAdditionalMonthCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Additional number of months employed at this job (less than 12).
`CurrentJobYearCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of full years employed at this job.
`EmployerAddress`	**Type** address **Properties** Filter, Nillable **Description** Address of borrower's employer or business.
`EmployerCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address city.
`EmployerCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address country.

Field	Details
EmployerGeocodeAccuracy	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
EmployerLatitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
EmployerLongitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
EmployerName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of borrower's employer or business.
EmployerPhone	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Employer's phone number.
EmployerPostalCode	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The address postal code.
`EmployerState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address state.
`EmployerStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address street.
`EmploymentExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's last date of employment at this job.
`IsLessThanQuarterShare`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower owns less than 25 percent of this business (if applicable).

Field	Details
IsRelToTransactionParty	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is employed by a family member, propery seller, real estate agent, or other person party to the loan application transaction.
IsSelfEmployed	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is self-employed or owns the business.
JobTitle	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The borrowers job title or employer's business or industry type.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LoanApplicantId	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description ID of the borrower associated with employment details.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with this borrower's employment information.
`MonthlyBaseIncomeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's base monthly income from this job.
`MonthlyBonusAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly bonus from this job.
`MonthlyCommissionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly commission from this job.
`MonthlyIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly income or loss from this business.
`MonthlyMilitaryEntlAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Borrower's monthly military entitlement from this job.
`MonthlyOtherIncomeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's other monthly income from this job.
`MonthlyOvertimeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly overtime income from this job.
`MonthlyTotalIncomeAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Borrower's total monthly income from this job. **Formula** `MonthlyBaseIncomeAmount + MonthlyOvertimeAmount + MonthlyBonusAmount + MonthlyCommissionAmount + MonthlyMilitaryEntlAmt + MonthlyOtherIncomeAmount`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan applicant employment.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.

Field	Details
StartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date borrower started working at this job.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicantEmploymentFeed
Feed tracking is available for the object.

LoanApplicantEmploymentHistory
History is available for tracked fields of the object.

LoanApplicantEmploymentOwnerSharingRule
Sharing rules are available for the object.

LoanApplicantEmploymentShare
Sharing is available for the object.

LoanApplicantIncome

Represents details about the borrower and co-borrower current monthly income. This object is available in API version 47.0 and later.

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. Possible values are: • `EUR`—Euro

Field	Details
	• INR—Indian Rupee • USD—U.S. Dollar
IncomeExtIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
IncomeSourceType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Source of borrower's monthly non-employment income. Possible values are: • Alimony • Automobile Allowance • Boarder Income • Capital Gains • Child Support • Disability • Foster Care • Housing or Parsonage • Interest and Dividends • Mortgage Credit Certificate • Mortgage Differential Payments • Notes Receivable • Other • Public Assistance • Retirement • Royalty Payments • Separate Maintenance • Social Security • Trust • Unemployment Benefits • VA Compensation

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LoanApplicantId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the borrower associated with this income.
LoanApplicationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with this income or expense.
MonthlyIncomeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount of the borrower's monthly non-employment income from this source.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description Name of the other monthly income.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicantIncomeFeed
Feed tracking is available for the object.

LoanApplicantIncomeHistory
History is available for tracked fields of the object.

LoanApplicantIncomeOwnerSharingRule
Sharing rules are available for the object.

LoanApplicantIncomeShare
Sharing is available for the object.

LoanApplicantLiability

Represents a junction between a borrower and a loan application liability. This object is available in API version 47.0 and later.

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Supported Calls

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

Fields

Field	Details
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description If multiple currencies is enabled, contains the currency ISO code associated with the record. Possible values are: • `EUR`—Euro • `INR`—Indian Rupee • `USD`—U.S. Dollar
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LoanApplicantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the borrower associated with the liability.
`LoanApplicationLiabilityId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the loan application associated with the liability.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description An auto-generated number assigned to this record.
`Role`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Identifies borrower's ownership role for the liability. Possible values are: • `Co-Holder` • `Primary` The default value is Co-Holder.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicantLiabilityHistory
History is available for tracked fields of the object.

LoanApplicationAsset

Represents details about the borrower's and co-borrower's current personal and real property. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account number associated with financial institution holding asset.

Field	Details
`AccountType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies asset account type. Possible values are: • `Bonds` • `Bridge Loan Proceeds` • `Cash Value of Life Insurance` • `Certificate of Deposit` • `Checking` • `Individual Development Account` • `Money Market` • `Mutual Fund` • `Retirement` • `Stock Options` • `Stocks` • `Trust Account`
`AssetClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies which asset class total to include the asset's value in. Possible values are: • `Financial` • `Other` • `Real Estate`
`AssetExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.

Field	Details
AssetType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies type of other asset. Possible values are: • Earnest Money • Employer Assistance • Other • Proceeds from Real Estate Property to be sold on or before closing • Proceeds from Sale of Non-Real Estate Asset • Rent Credit • Secured Borrowed Funds • Sweat Equity • Trade Equity • Unsecured Borrowed Funds
CashOrMarketValue	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Asset's cash or current market value.
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. Possible values are: • EUR—Euro • INR—Indian Rupee • USD—U.S. Dollar
DispositionType	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Real estate asset's planned future use. Possible values are: • `Pending Sale` • `Retained` • `Sold`
`FinancialInstitutionName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of financial institution where financial account is held.
`GrossMonthlyRentalIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly rent income collected on real estate asset.
`IsJointAsset`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates asset is held jointly.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with this asset.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application asset.
`NetMonthlyRentalIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's net monthly income on real estate asset.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
`PresentMarketValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cash value of real estate asset if sold today.
`RealEstateAddress`	**Type** address

Field	Details
	Properties Filter, Nillable **Description** Real estate asset's address.
`RealEstateCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address city.
`RealEstateCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address country.
`RealEstateGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
`RealEstateLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
`RealEstateLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
`RealEstateMonthlyExpense`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.
`RealEstatePostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address postal code.
`RealEstateState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address state.
`RealEstateStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address street.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicationAssetFeed
Feed tracking is available for the object.

LoanApplicationAssetHistory
History is available for tracked fields of the object.

LoanApplicationAssetOwnerSharingRule
Sharing rules are available for the object.

LoanApplicationAssetShare
Sharing is available for the object.

LoanApplicationFinancial

Represents transaction details for a loan application. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`BorrowerClosingCostAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total closing costs due from borrower, including prepaid and initial escrow payments.
`CashFromOrToBorrowerAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Cash the borrower pays or receives at closing, not including reserves or other funds that may still require lender verification. **Formula** `PurchasePriceAmount + RemodelAndRepairsAmount + LandAcquiredSeparatelyAmount + OutstandingLoanAmount + TotalDebtPaidOffAmount + BorrowerClosingCostAmt + DiscountPointCostAmount - LoanExclFinMortInsAmt - FinancedMortgageInsAmt - CreditFromSeller - OtherCredit`
`CounselingAgencyName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown
`CounselingAgencyProvName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.
`CounselingComplBorrName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of borrower or borrowers who completed housing counseling.
`CounselingCompletionDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date borrower completed housing counseling.
`CreditFromSeller`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of closing costs due from seller.
`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. Possible values are: • `EUR`—Euro

Field	Details
	• INR—Indian Rupee • USD—U.S. Dollar
DiscountPointCostAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total cost of discount points purchased by the borrower due at closing.
EdCompletedBorrowerName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of borrower or borrowers who completed homeownership education.
EstFirstMortgagePmtAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly first mortgage payment for loan application property, including principal and interest.
EstHomeownersInsPmtAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly payment for homeowners insurance on application property.
EstMortgageInsPmtAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly mortgage insurance payment on application property.
EstOtherDuesPaymentAmt	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.
`EstOtherPaymentAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed total monthly payment for other housing expenses on application property.
`EstPropertyTaxesPmtAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly payment for real estate taxes on application property.
`EstSubordinateLienPmtAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.
`EstSuppPropertyInsPmtAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.
`FinancedMortgageInsAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of financed mortgage insurance or financed mortgage insurance equivalent.

Field	Details
`FinancialExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`HasCompletedCounseling`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether one or more borrowers completed housing counseling within the last 12 months.
`HasHoEducation`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether one or more borrowers completed homeownership education within the last 12 months.
`HoEducationCompletedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date borrower completed homeownership education.
`HoEducationFormat`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates the format of homeownership education attended by borrower. Possible values are: • `Attended Workshop in Person` • `Completed Web-Based Workshop`

Field	Details
HousingCounselingFormat	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates the format of the housing counseling completed by borrower. Possible values are: • Face-to-Face • Internet • Telephone
HudApprAgencyIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.
HudApprovedProvIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.
LandAcquiredSeparatelyAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Price of land if purchased separately from the building or structure.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LoanAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount of loan including financed mortgage insurance or mortgage insurance equivalent. **Formula** `LoanExclFinMortInsAmt + FinancedMortgageInsAmt`
LoanApplicationId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the loan application associated with this loan transaction.
LoanExclFinMortInsAmt	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application financial.

Field	Details
`OtherCredit`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.
`OtherNewMortgageLoanAmt`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.
`OutstandingLoanAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of all mortgage loans on application property to be paid off by refinance loan.
`PurchasePriceAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Purchase price for the property.
`RemodelAndRepairsAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Cost of any alterations, improvements, and repairs on the property.
`TotalCashDueFromBorrower`	**Type** currency **Properties** Filter, Nillable, Sort

Field	Details
	Description Total cash due from borrower at closing. **Formula** `PurchasePriceAmount + RemodelAndRepairsAmount + LandAcquiredSeparatelyAmount + OutstandingLoanAmount + TotalDebtPaidOffAmount + BorrowerClosingCostAmt + DiscountPointCostAmount`
`TotalCredit`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total borrower credits. **Formula** `CreditFromSeller + OtherCredit`
`TotalDebtPaidOffAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total amount of all non-application property liabilities borrower indicated would be paid off on or before closing.
`TotalEstPaymentAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Proposed total monthly payment for application property. **Formula** `EstFirstMortgagePmtAmt + EstSubordinateLienPmtAmt + EstHomeownersInsPmtAmt + EstSuppPropertyInsPmtAmt + EstPropertyTaxesPmtAmt + EstMortgageInsPmtAmt + EstOtherDuesPaymentAmt + EstOtherPaymentAmt`
`TotalMortgageLoanAndCreditAmt`	**Type** currency **Properties** Filter, Nillable, Sort

Field	Details
	Description Total mortgage loans plus total credits. **Formula** `LoanExclFinMortInsAmt + FinancedMortgageInsAmt + CreditFromSeller + OtherCredit`
`TotalMortgageLoansAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount of loan. **Formula** `LoanExclFinMortInsAmt + FinancedMortgageInsAmt`

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicationFinancialFeed
Feed tracking is available for the object.

LoanApplicationFinancialHistory
History is available for tracked fields of the object.

LoanApplicationLiability

Represents details about the borrower and co-borrower current liabilities. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountNumber`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's account number with lender or creditor.
`AccountType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Personal debt borrower owes like credit card balances, other debts, and leases. Possible values are: • `Installment` • `Lease` • `Open 30-Day` • `Other` • `Revolving`
`CreditLimitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Credit limit of real estate loan or line of credit.
`CreditorName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lender or creditor owed the debt.
`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. Possible values are: • `EUR`—Euro

Field	Details
	• `INR`—Indian Rupee • `USD`—U.S. Dollar
`IsJointLiability`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description**
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LiabilityClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Include the liability's monthly payment in this liability class monthly payment total. Possible values are: • `Financial` • `Other` • `Real Estate`
`LiabilityExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
`LoanApplicationAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application real estate asset associated with a real estate liability.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the loan application associated with this liability.
`LoanType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Existing real estate loan type. Possible values are: • `Conventional` • `Federal Housing Authority` • `Other` • `USDA or Rural Housing Service` • `Veterans Affairs`
`MonthlyPaymentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Borrower's monthly payment required to keep debt account current.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application liability.
`OtherLiabilityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies type of other borrower expense or liability. Possible values are: • `Alimony` • `Child Support` • `Job Related Expenses` • `Other` • `Separate Maintenance`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
`ShouldBePaidInFull`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower to pay off debt on or before closing.
`UnpaidBalanceAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Unpaid liability balance when borrower completed loan application.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicationLiabilityFeed
Feed tracking is available for the object.

LoanApplicationLiabilityHistory
History is available for tracked fields of the object.

LoanApplicationLiabilityOwnerSharingRule
Sharing rules are available for the object.

LoanApplicationLiabilityShare
Sharing is available for the object.

LoanApplicationProperty

Represents details of the property the loan application finances. This object is available in API version 47.0 and later.

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. Possible values are: • `EUR`—Euro • `INR`—Indian Rupee • `USD`—U.S. Dollar
`ExpMonthlyRentalIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.

Field	Details
ExpNetMonthlyRentalInc	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.
IsManufacturedHome	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether application property is a manufactured home.
IsMixedUseProperty	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether application property includes commercial space set aside for business use.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LoanApplicationId	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description Loan application associated with this property.
`LoanPurposeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** What the borrower will use the loan for. Possible values are: • `Other` • `Purchase` • `Refinance`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application property.
`PropertyAddress`	**Type** address **Properties** Filter, Nillable **Description** Physical address of the property to be financed.
`PropertyCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address city.
`PropertyCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address country.

Field	Details
PropertyExtIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.
PropertyGeocodeAccuracy	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates.
PropertyLatitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.
PropertyLongitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.
PropertyPostalCode	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address postal code.
PropertyState	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The address state.
`PropertyStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address street.
`PropertyUseType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Borrower's stated use for the property. Possible values are: • `FHA Secondary Residence` • `Investment Property` • `Primary Residence` • `Secondary Residence`
`PropertyValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Estimated present market value of the application property.
`RequestedLoanAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total loan amount the borrower is applying for.
`UnitsFinancedCount`	**Type** int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Number of units being financed at this address.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicationPropertyFeed
Feed tracking is available for the object.

LoanApplicationPropertyHistory
History is available for tracked fields of the object.

LoanApplicationTitleHolder

Represents details of borrowers who are applying to hold title to the property the loan application finances. This object is available in API version 47.0 and later.

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. Possible values are: • `EUR`—Euro • `INR`—Indian Rupee • `USD`—U.S. Dollar
`IsCurrentTitleHolder`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether person is a current title holder on property to be refinanced.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LoanApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Loan application associated with this title holder.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the loan application title holder.
`TitleHolderExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable). This field is unique within your organization.

Field	Details
TitleHolderName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the person on the title for the property associated with the loan application.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

LoanApplicationTitleHolderFeed
Feed tracking is available for the object.

LoanApplicationTitleHolderHistory
History is available for tracked fields of the object.

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** Financial account associated with this opportunity.
ReferredByContact__c	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External contact referring this opportunity.
ReferredByUser__c	**Type** reference

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Internal user referring this opportunity.

OpportunityParticipant

Represents information about a participant in the context of an opportunity record. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Notes about this participant.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this participant is active.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An automatically generated name for the participant.
`OpportunityId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the opportunity related to the participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the user or group related to the participant.
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the object-based role for this participant.

ParticipantRole

Represents details like the name and associated default access level for a role that a participant can have in the context of a parent record. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
`DefaultAccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The default sharing access granted to the participant role. Valid values are: • `Edit`—Read/Write • `None` • `Read`—Read Only
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the participant role is activated.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the participant role.
`MasterLabel`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name for the participant role.
`ParentObject`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The parent object for the participant role. Valid values are: • `Account` • `InteractionSummary` This value is valid in version 51.0 and later. • `Opportunity`

PersonEducation

Represents information about professional education for a person in a party role.

Supported Calls

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

Fields

Field	Details
`CompletionDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Education's completion date.
`ContactId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who earned the degree and is listed as a contact.
`EducationLevel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Level of education achieved. Example values: • Undergraduate degree • Medical school • Internship • Residency • Fellowship
`GraduationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Graduation date from institution.
`Identifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID issued to the recipient by the educational institution.
`IdentifierIssuer`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Educational institution's name.
`IndividualId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who earned the degree and is listed as an individual.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the degree earned.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
StartDate	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Education's start date.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Current status of education. Valid values: • Inactive • Revoked • Draft • Verified The default value is Inactive.
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who earned the degree and is listed as a user.
`VerificationStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Current educational status. Valid values: • Authorized • None The default value is None.
`VerifiedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Education was validated on this date.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

PersonEducationFeed
Feed tracking is available for the object.

PersonEducationHistory
History is available for tracked fields of the object.

PersonEducationOwnerSharingRule
Sharing rules are available for the object.

PersonEducationShare
Sharing is available for the object.

PersonLifeEvent

Represents the life events of an individual, such as marriage, birth of a child, birthday, engagement.

Supported Calls

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

Fields

Field	Details
`EventDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date on which the life event occurred.
`EventDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the life event.
`EventLocation`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The location where the life event occurred. This is a compound field of type Address and combines these fields: EventLocationCity, EventLocationCountry, EventLocationGeocodeAccuracy, EventLocationLatitude, EventLocationLongitude, EventLocationPostalCode, EventLocationState, and EventLocationStreet. For more information, see Address Compound Fields.
`EventType`	**Type** picklist **Properties** Create, Filter, Group, Sort **Description** The type of the life event. For example, birth, graduation, job, marriage, relocation, car, home, baby, retirement.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The the date when a life event expired.
`ExpirationDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** Describes why the event expired.
`IsExpired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a life event has expired. The default value is False.
`IsTentative`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the exact date of the event is not known. The default value is False.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the life event.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
PrimaryPersonId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the person to whom the life event is related. This field cannot be updated using API.
RelatedPersonId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The person related to the primary person in a life event involving two people, such as marriage.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

PersonLifeEventFeed
Feed tracking is available for the object.

PersonLifeEventHistory
History is available for tracked fields of the object.

PersonLifeEventOwnerSharingRule
Sharing rules are available for the object.

PersonLifeEventShare
Sharing is available for the object.

PolicyPaymentMethod

Represents the premium payment method for a policy, such as credit card, debit card, or internet banking. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
EndDate__c	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the financial account was removed as the active payment method.
FinancialAccount__c	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The financial account that is used to make any payments for the policy. For example, debit card, credit card, bank account.
InsurancePolicy__c	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The policy for which this payment setup is done.
IsActive__c	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether this financial account and its billing configuration are active.
`IsPrimaryAccount__c`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the financial account is the primary billing account for the policy.
`PaymentPercentage__c`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of the total bill amount that is charged to this financial account.
`StartDate__c`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the financial account was added as an active payment method.

Producer

Represents an agent or an agency selling insurance.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the agency's business account.
ContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the contact associated with the producer if the producer is an external agent.
InternalUserId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** If the producer is an internal employee, this field contains the employee's user ID.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** A unique identifier for the agent or the agency.

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
Type	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the producer is an agent or an agency. If the producer reference has agency information, this field value is Agent. Otherwise, it can be an independent agent or agency.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ProducerFeed
Feed tracking is available for the object.

ProducerHistory
History is available for tracked fields of the object.

ProducerOwnerSharingRule
Sharing rules are available for the object.

ProducerShare
Sharing is available for the object.

ProducerCommission

Represents a producer's commission for an insurance policy. The commission can be calculated from the commissionable transactions or can be populated from an external system. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
CommissionAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The calculated commission amount for the insurance policy transaction.
CommissionableAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount on which the commission is applied. This can be a transaction amount or a portion of the premium.
InsurancePolicyAssetId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insured item for which the commission was calculated.
InsurancePolicyCoverageId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the policy coverage for which the commission was calculated.
InsurancePolicyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy for which the commission was calculated.
InsurancePolicyTransactionId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The transaction for which the commission record was created.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the producer commission.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`PaymentDatetime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the commission was paid.
`ProducerId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The producer, broker, brokerage, or other user who receives the commission.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The system from which the producer commission record was sourced.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of the producer commission record in the source system. This field is unique within your organization.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the commission payment. Possible values are: • `Disputed` • `Paid` • `Pending` • `Reversed`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of commission paid to a producer, account, or contact for a commissionable transaction. Possible values are: • `Advance`

Field	Details
	• `Bonus` • `Chargeback` • `Commission` • `Contingent Commission`

ProducerPolicyAssignment

A junction object that associates the Insurance Policy object with the Producer object. This object represents the producers who are managing the same insurance policy. This object is available in API version 47.0 and later. You see this object only if you have enabled the Let Multiple Producers Work on the Same Policy org pref.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The insurance policy that the producer is managing.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`LineOfBusiness`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The producer's line of business. Possible values are: • `Business Liability` • `Commercial Auto` • `Commercial Property`
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`ProducerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of one of the producers who are working on the insurance policy.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ProducerPolicyAssignmentFeed
Feed tracking is available for the object.

ProducerPolicyAssignmentHistory
History is available for tracked fields of the object.

ProducerPolicyAssignmentOwnerSharingRule
Sharing rules are available for the object.

ProducerPolicyAssignmentShare
Sharing is available for the object.

ProductCoverage

A junction object that associates the Product object with the CoverageType object. You see this object only if you have enabled the Access Master List of Coverage Types org pref.

Supported Calls

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

Fields

Field	Details
`CoverageTypeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the coverage type.
`EffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from which the coverage is in effect.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the coverage expires.
`IsCovered`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this coverage is included in the product. The default value is False.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** An auto-generated number assigned to this record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the product that is covered.

Field	Details
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ProductCoverageFeed
Feed tracking is available for the object.

ProductCoverageHistory
History is available for tracked fields of the object.

ProductCoverageOwnerSharingRule
Sharing rules are available for the object.

ProductCoverageShare
Sharing is available for the object.

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 **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

Field	Details
	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 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

Field	Details
	Description ID that uniquely identifies the reciprocal role in an external data source.

ResidentialLoanApplication

Represents details about a loan application from the lender. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the loan application.
`AmortizationTerm`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Duration of the loan in months.
`AmortizationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Amortization type for the loan. Possible values are: • `Adjustable Rate` • `Fixed Rate` • `Other`

Field	Details
`ApplicationExtIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID that uniquely identifies imported data in an external data source (if applicable).
`BalloonTermMonths`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months during which the cumulative loan must be repaid.
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** If multiple currencies are enabled, contains the currency ISO code associated with the record. Values are: • `EUR`—Euro • `INR`—Indian Rupee • `USD`—U.S. Dollar
`EstateHoldType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lender's lien is on both land and structure (fee simple) or just structure (leasehold). Possible values are: • `Fee Simple` • `Leasehold`
`HasOtherLoanFeature`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether loan has other amortization feature.
`HasPrepaymentPenalty`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.
`ImprovementCost`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Construction costs for a construction loan or home improvement costs for a renovation loan.
`InitialBuydownRate`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Initial lesser interest rate for the loan.
`IntOnlyTermMonthCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months that loan payments are interest only.
`InterestRate`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Interest rate for the loan.
`IsBalloon`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is applying for a balloon payment mortgage.
`IsBorrowerCommPropState`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether at least one borrower lives in a community property state.
`IsConstructionConversion`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan proceeds to provide permanent financing replacing interim construction financing.
`IsContractConversion`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan proceeds is to pay off balance due on a contract for deed or land contract.
`IsEnergyRelImprovement`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan is to finance energy-related improvements.
`IsInterestOnly`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is applying for an interest-only mortgage.

Field	Details
IsNegativeAmortization	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.
IsPropertyCommPropState	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether property is located in a community property state.
IsRenovation	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.
IsSingleClosing	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, the loan converts to a traditional mortgage.
IsSubjectToPriorityLien	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.
IsTempIntRateBuydown	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LeaseHoldExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date when leasehold expires if land is leased.
`LoanPurpose`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** What the borrower will use the loan for. Values are: • `Other` • `Purchase` • `Refinance`
`LotAcquiredDate`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Date the property or land was purchased.
`LotOriginalCost`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Original property cost (refinance) or original land cost (construction).
`MonthsBeforeFirstAdj`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months before the first rate adjustment for an adjustable rate loan.
`MonthsBetweenAdjustments`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Number of months between subsequent rate adjustments for an adjustable rate loan.
`MortgageLienType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of mortgage lien associated with this loan application. Possible values are: • `First Lien` • `Subordinate Lien`
`MortgageProgramType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description Type of mortgage program applied for. Values are: • `Conventional` • `FHA` • `Other` • `USDARuralHousingService` • `VA`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the residential loan application.
`NativeLandTenure`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use. Possible values are: • `Alaska Native Corporation Land` • `Fee Simple (On a Reservation)` • `Individual Trust Land (Allotted/Restricted)` • `Tribal Trust Land (Off Reservation)` • `Tribal Trust Land (On a Reservation)`
`OpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the opportunity associated with the loan application.
`OtherAmortizationType`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Description of other amortization type for government loans.
`OtherLoanFeature`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of other loan amortization feature.
`OtherLoanPurpose`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** What the borrower will use the loan for if other was specified.
`OtherMortgageProgramType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the other mortgage type.
`OtherRefinanceProgType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Refinance program name if other was specified.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who owns this record.
`PrepayPenaltyTermMonth`	**Type** double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Number of months during which borrower incurs a penalty for early payoff of the loan balance.
`ProjectType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of project that the property belongs to. Possible values are: • `Condominium` • `Cooperative` • `Planned Unit Development(PUD)` • `Property is not located in a project`
`RefinanceProgramType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicable refinance program type based on the investor, guarantor, or lender guidelines. Possible values are: • `Full Documentation` • `Interest Rate Reduction` • `Other` • `Streamlined without Appraisal`
`RefinanceType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Refinance loan type. Possible values are: • `Cash Out` • `Limited Cash Out` • `No Cash Out`

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates the current status of the loan application. Possible values are: • `Completed` • `New` • `Pending`
`TitleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Way the borrower or borrowers take title for the loan. Possible values are: • `Joint Tenancy with Right of Survivorship` • `Life Estate` • `Other` • `Sole Ownership` • `Tenancy by the Entirety` • `Tenancy in Common`
`TotalFinLiabilityMonthlyAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total monthly amount of borrowers' outstanding financial liabilities payments excluding real estate.
`TotalFinancialAssetAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount of borrowers' financial account assets excluding real estate.

Field	Details
`TotalOtherAssetAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount of borrowers' other assets excluding real estate.
`TotalOtherFinLiabilityMonthlyAmt`	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total monthly amount of borrowers' other monthly liability and expense payments excluding real estate.
`TrustTitleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Title to be held in a living trust or a land trust. Possible values are: • `Title Will be Held by a Land Trust` • `Title Will be Held by an Inter Vivos (Living) Trust`

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

ResidentialLoanApplicationFeed
Feed tracking is available for the object.

ResidentialLoanApplicationHistory
History is available for tracked fields of the object.

ResidentialLoanApplicationOwnerSharingRule
Sharing rules are available for the object.

ResidentialLoanApplicationShare
Sharing is available for the object.

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 **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

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

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

Field	Details
	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.
`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

Field	Details
	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.
`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.

SecuritiesHolding

Represents the securities associated with an insurance policy. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AssetCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subcategory of asset type. Possible values are: • `Allocation` • `Alternative` • `Commodities` • `International Equity` • `Municipal Bond` • `Sector Equity` • `Taxable Bond` • `U.S. Equity`
`AssetCategoryName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The market capitalization and investing style. Possible values are: • `Large Blend` • `Large Growth` • `Large Value` • `Mid-Cap Blend` • `Mid-Cap Growth`

Field	Details
	• `Mid-Cap Value` • `Small Blend` • `Small Growth` • `Small Value`
`AssetClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The major category of asset type. Possible values are: • `Alternative Investments` • `Cash Equivalents` • `Equities` • `Fixed Income`
`GainLoss`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Change in the value of this holding since its purchase.
`HouseholdId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The household this holding rolls up to.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy this holding is related to.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastUpdated`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp for when data for this holding was last updated by an external data source.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MarketValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current market value of this holding.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the holding.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.

Field	Details
`PercentChange`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percent change in the value of this holding since its purchase.
`Price`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Current price per share.
`PrimaryOwnerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary owner of this holding.
`PurchasePrice`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Price per share at the time of purchase.
`Shares`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The number of shares held.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.

Field	Details
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The ID of this record in the source system. This field is unique within your organization.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

SecuritiesHoldingFeed
Feed tracking is available for the object.

SecuritiesHoldingHistory
History is available for tracked fields of the object.

SecuritiesHoldingOwnerSharingRule
Sharing rules are available for the object.

SecuritiesHoldingShare
Sharing is available for the object.

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.

Field Name	Details
`NextSteps__c`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **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

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

Field	Details
	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.

WorkerCompCoverageClass

Represents the compensation coverage class that a worker belongs to. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`InsurancePolicyCoverageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The coverages included in the insurance policy.
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy that covers this compensation coverage class.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the compensation coverage class.

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
`Premium`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium for the insurance policy that covers this compensation coverage class.
`TotalExposure`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The payroll that the employees of this compensation coverage class belong to.
`WorkerClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code that represents the compensation class of the employees. Possible values are: • `1701 Abrasive Wheel Mfg. & Drivers` • `1748 Abrasive Wheel Mfg. & Drivers` • `1860 Abrasive Paper or Cloth Preparation`
`WorkerCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of employees in this compensation coverage class.
`WorkerLocationId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The location where the worker is employed.

Associated Objects

This object has the following associated objects. Unless noted, they are available in the same API version as this object.

WorkerCompCoverageClassFeed
Feed tracking is available for the object.

WorkerCompCoverageClassHistory
History is available for tracked fields of the object.

WorkerCompCoverageClassOwnerSharingRule
Sharing rules are available for the object.

WorkerCompCoverageClassShare
Sharing is available for the object.

FINANCIAL SERVICES CLOUD SETUP OBJECTS

Use setup objects to interact with metadata for declarative development. For example, you can create your own version of Setup, or restrict the amount of data required to push to an app to a mobile phone.

SEE ALSO:

Tooling API Developer Guide

BatchCalcJobDefinition

Represents a Data Processing Engine definition. This object is available in API version 51.0 and later.

Supported SOAP API Calls

`describeSObjects()`, `query()`, `retrieve()`

Supported REST API Methods

`DELETE, GET, HEAD, PATCH, POST, Query`

Fields

Field	Details
`BatchJobDefinitionId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the associated batch job definition.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the Data Processing Engine definition.
`FullName`	**Type** string

Field	Details
	Properties Create, Group, Nillable **Description** The name of the Data Processing Engine definition. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`IsTemplate`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this is a template Data Processing Engine definition.
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language in which this Data Processing Engine definition is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified)

Field	Details
	• `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label of the Data Processing Engine definition.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Data Processing Engine definition's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can

Field	Details
	refer to a component in a managed package by using the ***namespacePrefix__componentName*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are not Developer Edition organizations, `NamespacePrefix` is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
`ProcessType`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The process type for which the Data Processing Engine definition is created. Possible values are: • `DataProcessingEngine`—Standard • `Rebates` • `Loyalty` • `FSCHierarchyRollUp`

BatchJobDefinition

Represents the definition of a batch job. This object is available in API version 51.0 and later.

Supported SOAP API Calls

`describeSObjects()`, `query()`, `retrieve()`

Supported REST API Methods

`DELETE, GET, HEAD, PATCH, POST, Query`

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the batch job definition.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The developer name of the batch job.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language in which the batch job is created. Possible values are: • `af`—Afrikaans • `am`—Amharic • `ar`—Arabic • `ar_AE`—Arabic (United Arab Emirates) • `ar_BH`—Arabic (Bahrain) • `ar_DZ`—Arabic (Algeria) • `ar_EG`—Arabic (Egypt) • `ar_IQ`—Arabic (Iraq) • `ar_JO`—Arabic (Jordan) • `ar_KW`—Arabic (Kuwait) • `ar_LB`—Arabic (Lebanon) • `ar_LY`—Arabic (Libya) • `ar_MA`—Arabic (Morocco) • `ar_OM`—Arabic (Oman) • `ar_QA`—Arabic (Qatar) • `ar_SA`—Arabic (Saudi Arabia)

Field	Details
	• ar_SD—Arabic (Sudan) • ar_SY—Arabic (Syria) • ar_TN—Arabic (Tunisia) • ar_YE—Arabic (Yemen) • bg—Bulgarian • bn—Bengali • bs—Bosnian • ca—Catalan • cs—Czech • cy—Welsh • da—Danish • de—German • de_AT—German (Austria) • de_BE—German (Belgium) • de_CH—German (Switzerland) • de_LU—German (Luxembourg) • el—Greek • en_AU—English (Australian) • en_CA—English (Canadian) • en_GB—English (UK) • en_HK—English (Hong Kong) • en_IE—English (Ireland) • en_IN—English (Indian) • en_MY—English (Malaysian) • en_NZ—English (New Zealand) • en_PH—English (Phillipines) • en_SG—English (Singapore) • en_US—English • en_ZA—English (South Africa) • eo—Esperanto (Pseudo) • es—Spanish • es_AR—Spanish (Argentina) • es_BO—Spanish (Bolivia) • es_CL—Spanish (Chile) • es_CO—Spanish (Colombia) • es_CR—Spanish (Costa Rica) • es_DO—Spanish (Dominican Republic) • es_EC—Spanish (Ecuador)

Field	Details
	• es_GT—Spanish (Guatemala) • es_HN—Spanish (Honduras) • es_MX—Spanish (Mexico) • es_NI—Spanish (Nicaragua) • es_PA—Spanish (Panama) • es_PE—Spanish (Peru) • es_PR—Spanish (Puerto Rico) • es_PY—Spanish (Paraguay) • es_SV—Spanish (El Salvador) • es_US—Spanish (United States) • es_UY—Spanish (Uruguay) • es_VE—Spanish (Venezuela) • et—Estonian • eu—Basque • fa—Farsi • fi—Finnish • fr—French • fr_BE—French (Belgium) • fr_CA—French (Canadian) • fr_CH—French (Switzerland) • fr_LU—French (Luxembourg) • ga—Irish • gu—Gujarati • hi—Hindi • hr—Croatian • hu—Hungarian • hy—Armenian • in—Indonesian • is—Icelandic • it—Italian • it_CH—Italian (Switzerland) • iw—Hebrew • iw_EO—Esperanto RTL (Pseudo) • ja—Japanese • ka—Georgian • km—Khmer • kn—Kannada • ko—Korean

Field	Details
	• lb—Luxembourgish • lt—Lithuanian • lv—Latvian • mi—Te reo • mk—Macedonian • ml—Malayalam • mr—Marathi • ms—Malay • mt—Maltese • my—Burmese • nl_BE—Dutch (Belgium) • nl_NL—Dutch • no—Norwegian • pl—Polish • pt_BR—Portuguese (Brazil) • pt_PT—Portuguese (European) • rm—Romansh • ro—Romanian • ro_MD—Romanian (Moldova) • ru—Russian • sh—Serbian (Latin) • sh_ME—Montenegrin • sk—Slovak • sl—Slovene • sq—Albanian • sr—Serbian (Cyrillic) • sv—Swedish • sw—Swahili • ta—Tamil • te—Telugu • th—Thai • tl—Tagalog • tr—Turkish • uk—Ukrainian • ur—Urdu • vi—Vietnamese • xh—Xhosa • zh_CN—Chinese (Simplified)

Field	Details
	• `zh_HK`—Chinese (Hong Kong) • `zh_SG`—Chinese (Singapore) • `zh_TW`—Chinese (Traditional) • `zu`—Zulu
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label of the batch job.
`ProcessGroup`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The group or team that's using the batch job. This field is only applicable to Batch Management jobs.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The status of the batch job. Possible values are: • `Active` • `Inactive`
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of batch job. Possible values are: • `Calc`—Data Processing Engine • `Flow`

FINANCIAL SERVICES CLOUD ASSOCIATED OBJECTS

This section provides a list of objects associated to Financial Services Cloud standard objects with their standard fields.

Some fields may not be listed for some objects. To see the system fields for each object, see System Fields in the *Object Reference for Salesforce and Lightning Platform*.

To verify the complete list of fields for an object, use a describe call from the API or inspect with an appropriate tool. For example, inspect the WSDL or use a schema viewer.

`StandardObjectName`Feed

`StandardObjectName`Feed is the model for all feed objects associated with standard objects. These objects represent the posts and feed-tracked changes of a standard object.

The object name is variable and uses `StandardObjectName`Feed syntax. For example, AccountFeed represents the posts and feed-tracked changes on an account record. We list the available associated feed objects at the end of this topic. For specific version information, see the documentation for the standard object.

Supported Calls

`delete()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`

Special Access Rules

In the internal org, users can delete all feed items they created. This rule varies in communities where threaded discussions and delete-blocking are enabled. Community members can delete all feed items they created, provided the feed items don't have content nested under them—like a comment, answer, or reply. Where the feed item has nested content, only feed moderators and users with the Modify All Data permission can delete threads.

To delete feed items they didn't create, users must have one of these permissions:

- Modify All Data
- Modify All on the parent object, like Account for AccountFeed
- Moderate Chatter

  Note: Users with the Moderate Chatter permission can delete only the feed items and comments they can see.

  Only users with this permission can delete items in unlisted groups.

For more special access rules, if any, see the documentation for the standard object. For example, for AccountFeed, see the special access rules for Account.

Fields

Field	Details
`BestCommentId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the comment marked as best answer on a question post.
`Body`	**Type** textarea **Properties** Nillable, Sort **Description** The body of the post. Required when `Type` is `TextPost`. Optional when `Type` is `ContentPost` or `LinkPost`.
`CommentCount`	**Type** int **Properties** Filter, Group, Sort **Description** The number of comments associated with this feed item.
`ConnectionId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** When a PartnerNetworkConnection modifies a record that is tracked, the `CreatedBy` field contains the ID of the system administrator. The `ConnectionId` contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.
`InsertedById`	**Type** reference **Properties** Group, Nillable, Sort **Description** ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the `InsertedBy` value is set to the ID of the context user.

Field	Details
`isRichText`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the feed item `Body` contains rich text. If you post a rich text feed comment using SOAP API, set `IsRichText` to `true` and escape HTML entities from the body. Otherwise, the post is rendered as plain text. Rich text supports the following HTML tags: • `<p>` Tip: Though the ` ` tag isn't supported, you can use `<p> </p>` to create lines. • `<a>` • `<b>` • `<code>` • `<i>` • `<u>` • `<s>` • `<ul>` • `<ol>` • `<li>` • `<img>` The `<img>` tag is accessible only through the API and must reference files in Salesforce similar to this example: `<img src="sfdc://069B0000000omjh"></img>` Note: In API version 35.0 and later, the system replaces special characters in rich text with escaped HTML. In API version 34.0 and prior, all rich text appears as a plain-text representation.
`LikeCount`	**Type** int **Properties** Filter, Group, Sort **Description** The number of likes associated with this feed item.
`LinkUrl`	**Type** url **Properties** Nillable, Sort

Field	Details
	Description The URL of a `LinkPost`.
`NetworkScope`	**Type** picklist **Properties** Group, Nillable, Restricted picklist, Sort **Description** Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org. `NetworkScope` can have the following values: • `NetworkId`—The ID of the Experience Cloud site in which the FeedItem is available. If left empty, the feed item is only available in the default Experience Cloud site. • `AllNetworks`—The feed item is available in all Experience Cloud sites. Note the following exceptions for `NetworkScope`: • Only feed items with a Group or User parent can set a `NetworkId` or a null value for `NetworkScope`. • For feed items with a record parent, users can set `NetworkScope` only to `AllNetworks`. • You can't filter a feed item on the `NetworkScope` field.
`ParentId`	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the record that is tracked in the feed. The detail page for the record displays the feed.
`RelatedRecordId`	**Type** reference **Properties** Group, Nillable, Sort **Description** ID of the ContentVersion record associated with a `ContentPost`. This field is null for all posts except `ContentPost`.
`Title`	**Type** string **Properties** Group, Nillable, Sort

Field	Details
	Description The title of the feed item. When the `Type` is `LinkPost`, the `LinkUrl` is the URL and this field is the link name.
`Type`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of feed item. Values are: • `ActivityEvent`—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging). For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence. • `AdvancedTextPost`—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post. • `AnnouncementPost`—Not used. • `ApprovalPost`—generated when a user submits an approval. • `BasicTemplateFeedItem`—Not used. • `CanvasPost`—a post made by a canvas app posted on a feed. • `CollaborationGroupCreated`—generated when a user creates a public group. • `CollaborationGroupUnarchived`—Not used. • `ContentPost`—a post with an attached file. • `CreatedRecordEvent`—generated when a user creates a record from the publisher. • `DashboardComponentAlert`—generated when a dashboard metric or gauge exceeds a user-defined threshold. • `DashboardComponentSnapshot`—created when a user posts a dashboard snapshot on a feed. • `LinkPost`—a post with an attached URL. • `PollPost`—a poll posted on a feed. • `ProfileSkillPost`—generated when a skill is added to a user's Chatter profile. • `QuestionPost`—generated when a user posts a question. • `ReplyPost`—generated when Chatter Answers posts a reply. • `RypplePost`—generated when a user creates a Thanks badge in WDC. • `TextPost`—a direct text entry on a feed. • `TrackedChange`—a change or group of changes to a tracked field. • `UserStatus`—automatically generated when a user adds a post. Deprecated.

Field	Details
`Visibility`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies whether this feed item is available to all users or internal users only. This field is available if Salesforce Communities are enabled for your organization. `Visibility` can have the following values: • `AllUsers`—The feed item is available to all users who have permission to see the feed item. • `InternalUsers`—The feed item is available to internal users only. Note the following exceptions for `Visibility`: • For record posts, `Visibility` is set to `InternalUsers` for all internal users by default. • External users can set `Visibility` only to `AllUsers`. • On user and group posts, only internal users can set `Visibility` to `InternalUsers`.

Usage

A feed for an object is automatically created when a user enables feed tracking for the object. Use feeds to track changes to records. For example, AccountFeed tracks changes to an account record. Use feed objects to retrieve the content of feed fields, such as type of feed or feed ID.

Note the following SOQL restrictions. No SOQL limit if logged-in user has View All Data permission. If not, specify a `LIMIT` clause of 1,000 records or fewer. SOQL `ORDER BY` on fields using relationships is not available. Use `ORDER BY` on fields on the root object in the SOQL query.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- AwardFeed
- BatchJobFeed
- BatchJobPartFailedRecordFeed
- BatchJobPartFeed
- BusinessLicenseFeed
- BusinessMilestoneFeed
- BusinessProfileFeed
- ClaimCaseFeed
- ClaimFeed
- ClaimItemFeed

- ClaimParticipantFeed
- CoverageTypeFeed
- CustomerPropertyFeed
- DocumentChecklistItemFeed
- InsuranceClaimAssetFeed
- InsurancePolicyAssetFeed
- InsurancePolicyCoverageFeed
- InsurancePolicyFeed
- InsurancePolicyMemberAssetFeed
- InsurancePolicyParticipantFeed
- InsuranceProfileFeed
- LoanApplicantAddressFeed
- LoanApplicantDeclarationFeed
- LoanApplicantEmploymentFeed
- LoanApplicantFeed
- LoanApplicantIncomeFeed
- LoanApplicationAssetFeed
- LoanApplicationFinancialFeed
- LoanApplicationLiabilityFeed
- LoanApplicationPropertyFeed
- LoanApplicationTitleHolderFeed
- PersonLifeEventFeed
- ProducerFeed
- ProducerPolicyAssignmentFeed
- ProductCoverageFeed
- ResidentialLoanApplicationFeed
- SecuritiesHoldingFeed
- WorkerCompCoverageClassFeed

*StandardObjectName*History

*StandardObjectName*History is the model for all history objects associated with standard objects. These objects represent the history of changes to the values in the fields of a standard object.

The object name is variable and uses *StandardObjectName*History syntax. For example, AccountHistory represents the history of changes to the values of an account record's fields. We list the available associated history objects at the end of this topic. For specific version information, see the documentation for the standard object.

Supported Calls

`describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for AccountHistory, see the special access rules for Account.

Fields

Field Name	Details
*StandardObjectName*Id	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the standard object.
DataType	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Data type of the field that was changed.
Field	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Name of the field that was changed.
NewValue	**Type** anyType **Properties** Nillable, Sort **Description** New value of the field that was changed.
OldValue	**Type** anyType **Properties** Nillable, Sort **Description** Old value of the field that was changed.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- AwardHistory
- BatchJobFeed
- BatchJobPartFailedRecordFeed
- BatchJobPartFeed
- BusinessLicenseHistory
- BusinessMilestoneHistory
- BusinessProfileHistory
- ClaimCaseHistory
- ClaimHistory
- ClaimItemHistory
- ClaimParticipantHistory
- CoverageTypeHistory
- CustomerPropertyHistory
- DocumentChecklistItemHistory
- InsuranceClaimAssetHistory
- InsurancePolicyAssetHistory
- InsurancePolicyCoverageHistory
- InsurancePolicyHistory
- InsurancePolicyMemberAssetHistory
- InsurancePolicyParticipantHistory
- InsuranceProfileHistory
- LoanApplicantAddressHistory
- LoanApplicantAssetHistory
- LoanApplicantDeclarationHistory
- LoanApplicantEmploymentHistory
- LoanApplicantHistory
- LoanApplicantIncomeHistory
- LoanApplicantLiabilityHistory
- LoanApplicationAssetHistory
- LoanApplicationFinancialHistory
- LoanApplicationLiabilityHistory
- LoanApplicationPropertyHistory
- LoanApplicationTitleHolderHistory
- PersonEducationHistory
- PersonLifeEventHistory
- ProducerHistory
- ProducerPolicyAssignmentHistory

- ProductCoverageHistory
- ResidentialLoanApplicationHistory
- SecuritiesHoldingHistory
- WorkerCompCoverageClassHistory

*StandardObjectName*OwnerSharingRule

*StandardObjectName*OwnerSharingRule is the model for all owner sharing rule objects associated with standard objects. These objects represent a rule for sharing a standard object with users other than the owner.

The object name is variable and uses *StandardObjectName*OwnerSharingRule syntax. For example, ChannelProgramOwnerSharingRule is a rule for sharing a channel program with users other than the channel program owner. We list the available associated owner sharing rule objects at the end of this topic. For specific version information, see the standard object documentation.

Note: To enable access to this object for your org, contact Salesforce customer support. However, we recommend that you instead use Metadata API to programmatically update owner sharing rules because it triggers automatic sharing rule recalculation. The SharingRules Metadata API type is enabled for all orgs.

Supported Calls

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

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for ChannelProgramOwnerSharingRule, see the special access rules for ChannelProgram.

Fields

Field Name	Details
`AccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Determines the level of access users have to records. Values are: • `Read` (read only) • `Edit` (read/write)
`Description`	**Type** textarea

Field Name	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Description of the sharing rule. Maximum length is 1000 characters.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance may slow while Salesforce generates one for each record.
`GroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the source group. Records that are owned by users in the source group trigger the rule to give access.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.
`UserOrGroupId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field Name	Details
	Description ID of the user or group that you are granting access to.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- ActionPlanOwnerSharingRule
- ActionPlanTemplateOwnerSharingRule
- AwardOwnerSharingRule
- BusinessLicenseOwnerSharingRule
- ClaimOwnerSharingRule
- CoverageTypeOwnerSharingRule
- CustomerPropertyOwnerSharingRule
- DocumentChecklistItemOwnerSharingRule
- InsurancePolicyAssetOwnerSharingRule
- InsurancePolicyOwnerSharingRule
- LoanApplicantDeclarationOwnerSharingRule
- LoanApplicantEmploymentOwnerSharingRule
- LoanApplicantIncomeOwnerSharingRule
- LoanApplicantOwnerSharingRule
- LoanApplicationAssetOwnerSharingRule
- LoanApplicationLiabilityOwnerSharingRule
- PersonEducationOwnerSharingRule
- PersonLifeEventOwnerSharingRule
- ProducerOwnerSharingRule
- ProducerPolicyAssignmentOwnerSharingRule
- ProductCoverageOwnerSharingRule
- ResidentialLoanApplicationOwnerSharingRule
- SecuritiesHoldingOwnerSharingRule
- WorkerCompCoverageClassOwnerSharingRule

*StandardObjectName*Share

*StandardObjectName*Share is the model for all share objects associated with standard objects. These objects represent a sharing entry on the standard object.

The object name is variable and uses *StandardObjectName*Share syntax. For example, AccountBrandShare is a sharing entry on an account brand. We list the available associated share objects at the end of this topic. For specific version information, see the standard object documentation.

Supported Calls

`create()`, `delete()`, `describeSObjects()`, `query()`, `retrieve()`, `update()`, `upsert()`

Special Access Rules

For specific special access rules, if any, see the documentation for the standard object. For example, for AccountBrandShare, see the special access rules for AccountBrand.

Fields

Field Name	Details
`AccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The level of access allowed. Values are: • `All` (owner) • `Edit` (read/write) • `Read` (read only)
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the parent record.
`RowCause`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Reason that the sharing entry exists.
`UserOrGroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the user or group that has been given access to the object.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- ActionPlanShare
- ActionPlanTemplateShare
- AwardShare
- BusinessLicenseShare
- ClaimShare
- CoverageTypeShare
- CustomerPropertyShare
- DocumentChecklistItemShare
- InsurancePolicyAssetShare
- InsurancePolicyShare
- LoanApplicantDeclarationShare
- LoanApplicantEmploymentShare
- LoanApplicantIncomeShare
- LoanApplicantShare
- LoanApplicationAssetShare
- LoanApplicationLiabilityShare
- PersonEducationShare
- PersonLifeEventShare
- ProducerPolicyAssignmentShare
- ProducerShare
- ProductCoverageShare
- ResidentialLoanApplicationShare
- SecuritiesHoldingShare
- WorkerCompCoverageClassShare

FINANCIAL SERVICES CLOUD BUSINESS APIS

Financial Services Cloud Business APIs are RESTful APIs that are sometimes available as Apex classes and methods.

REST Reference
You can access Financial Services Cloud Business APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

REST Reference

You can access Financial Services Cloud Business APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

To understand the architecture, authentication, rate limits, and how the requests and responses work, see Connect REST API Developer Guide.

Mortgage Business Resources
Here's a list of Financial Services Cloud Mortgage Business API resources.

Request Bodies
Here's a list of Financial Services Cloud Business API request bodies.

Response Bodies
Here's a list of Financial Services Cloud Business API response bodies.

Mortgage Business Resources

Here's a list of Financial Services Cloud Mortgage Business API resources.

Application Mapper
Create financial accounts and related records from a residential loan application.

Mortgage Application
Use a single API call to get and update mortgage application information like borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders. You can use both the `loanApplicationId` and the `externalID` of an external system to get a mortgage application.

Mortgage Applications
Create mortgage applications using the POST method.

Application Mapper

Create financial accounts and related records from a residential loan application.

Resource

```
/connect/financialservices/mapper
```

Available version

49.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "recordId": "0cdB0000000CbVGIA0"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordId	String	ID of the residential loan application.	Required	49.0

Response example

```
{
  "result": {
    "assetsAndLiabilities": [
      "a03B000000735LwIAI",
      "a03B000000735LxIAI",
      "a03B000000735LyIAI"
    ],
    "customerProperties": [
      "0b8B0000000GnjdIAC"
    ],
    "errors": [],
    "financialAccounts": [
      "a0EB000000227WtMAI",
      "a0EB000000227WuMAI",
      "a0EB000000227WvMAI"
    ],
    "personAccounts": [
      "001B000001K8Zx5IAF"
    ],
    "status": "SUCCESS"
  }
}
```

Response body for POST

Mapper Result Representation on page 461

Mortgage Application

Use a single API call to get and update mortgage application information like borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders. You can use both the `loanApplicationId` and the `externalID` of an external system to get a mortgage application.

Resource

```
/connect/financialservices/mortgages/loanId
```

Available version

48.0

Authentication

Use OAuth to connect to Salesforce and get an access token. Pass the access token in your requests. For more information, see Connect to Connect REST API Using OAuth.

HTTP methods

GET, PATCH

Path Parameters

Parameter Name	Type	Description	Required	Available version
loanId	String	`id` or `externalId` associated with a loan application.	Yes	48.0

Request body JSON Example

```
{
  "amortizationTerm": 30
}
```

Response body for GET and PATCH

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	Error message, if any.	Small, 48.0	48.0
`result`	Mortgage Information Output[]	Data of the mortgage result.	Small, 48.0	48.0

Sample response body for GET and PATCH

```
{
  "result" : {
    "accountId" : "001RM000004Xra2YAC",
    "assets" : [ ],
    "borrowers" : [ ],
    "createdById" : "005RM000001vbghYAA",
    "createdDate" : "2019-11-06T19:29:10.000Z",
```

```
    "extendedFields" : [ ],
    "externalId" : "tt2",
    "financials" : [ ],
    "hasOtherLoanFeature" : false,
    "hasPrepaymentPenalty" : false,
    "id" : "0cdRM00000000n5YAA",
    "isBalloon" : false,
    "isBorrowerInCommunityPropState" : false,
    "isConstructionToPermanent" : false,
    "isContractForDeed" : false,
    "isDeleted" : false,
    "isEnergyRelatedImprovement" : false,
    "isInterestOnly" : false,
    "isNegativeAmortization" : false,
    "isPropInCommunityPropState" : false,
    "isRenovation" : false,
    "isSingleClosing" : false,
    "isSubjectToPriorityLien" : false,
    "isTempIntRateBuydown" : false,
    "lastModifiedById" : "005RM000001vbghYAA",
    "lastModifiedDate" : "2019-11-06T19:31:07.000Z",
    "lastReferencedDate" : "2019-11-06T19:35:31.000Z",
    "lastViewedDate" : "2019-11-06T19:35:31.000Z",
    "liabilities" : [ ],
    "name" : "tt2",
    "ownerId" : "005RM000001vbghYAA",
    "properties" : [ ],
    "systemModstamp" : "2019-11-06T19:31:07.000Z",
    "titleHolders" : [ {
      "createdById" : "005RM000001vbghYAA",
      "createdDate" : "2019-11-06T19:29:10.000Z",
      "extendedFields" : [ ],
      "externalId" : "tt1",
      "id" : "0cTRM000000009e2AA",
      "isCurrentTitleHolder" : false,
      "isDeleted" : false,
      "lastModifiedById" : "005RM000001vbghYAA",
      "lastModifiedDate" : "2019-11-06T19:31:07.000Z",
      "lastReferencedDate" : "2019-11-06T19:31:07.000Z",
      "lastViewedDate" : "2019-11-06T19:31:07.000Z",
      "loanApplicationId" : "0cdRM00000000n5YAA",
      "name" : "tt2",
      "systemModstamp" : "2019-11-06T19:31:07.000Z"
    } ]
  }
}
```


Mortgage Applications

Create mortgage applications using the POST method.

A single API call lets you:

- Create records for objects like `ResidentialLoanApplication, LoanApplicant LoanApplicantAddress, LoanApplicantAsset, LoanApplicantDeclaration, LoanApplicantEmployment,`

`LoanApplicantIncome`, `LoanApplicantLiability`, `LoanApplicationAsset`, `LoanApplicationFinancial`, `LoanApplicationLiability`, `LoanApplicationProperty`, and `LoanApplicationTitleHolder`.

- Add your org's custom fields with the `extendedFields` property for mortgage applications, borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders information.
- Use IDs from external systems with the `externalId` parameter for mortgage applications, borrowers, declarations, incomes, addresses, financial transactions, liabilities, assets, properties, and title holders.

Resource

```
/connect/financialservices/mortgages
```

Available version

48.0

Authentication

Use OAuth to connect to Salesforce and get an access token. Pass the access token in your requests. For more information, see Connect to Connect REST API Using OAuth.

HTTP methods

POST

Request body

JSON example

```
{
  "accountId": "001RM000004XraFYAS",
  "amortizationTerm": 30,
  "amortizationType": "Adjustable Rate",
  "assets": [
    {
      "accountNumber": "849393",
      "accountType": "Checking",
      "assetClass": "Financial",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 434934903,
      "dispositionType": "Pending Sale",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "financialInstitutionName": "BOFA",
      "grossMonthlyRentalIncome": 355395355,
      "name": "Asset1",
      "netMonthlyRentalIncome": 2535345,
      "presentMarketValue": 7937399,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
      },
      "realEstateMonthlyExpense": 3413131
    },
```

```
    {
      "accountNumber": "2424242424",
      "accountType": "Checking",
      "assetClass": "Real Estate",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 24424525,
      "dispositionType": "Sold",
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "financialInstitutionName": "wells",
      "grossMonthlyRentalIncome": 24242224,
      "name": "Asset2",
      "netMonthlyRentalIncome": 242424234,
      "presentMarketValue": 2423131313,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "123 2nd Street"
      },
      "realEstateMonthlyExpense": 2242423424
    }
  ],
  "balloonTermMonths": 3,
  "borrowers": [
    {
      "addresses": [
        {
          "addressOwnership": "Own",
          "extendedFields": [],
          "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
          "monthlyRentPayment": 2300,
          "name": "Addr1",
          "residenceAdditionalMonthCount": 23,
          "residenceAddress": {
            "city": "San Francisco",
            "country": "United States",
            "postalCode": "94105",
            "state": "CA",
            "street": "50 Fremont Street"
          },
          "residenceYearCount": 3,
          "residencyType": "Former Residence"
        }
      ],
      "asianRaceSubType": "Asian Indian",
      "borrowerType": "Borrower",
      "citizenshipStatus": "U.S. Citizen",
      "declarations": [
        {
          "bankruptcyType": "Chapter 11",
```

```
      "borrowedAmount": 20000,
      "extendedFields": [],
      "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Secondary Residence"
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "25,34",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 4,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "extendedFields": [],
      "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2300,
      "monthlyBonusAmount": 100,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 5000,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 10,
      "monthlyOvertimeAmount": 200,
      "name": "Empl1",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ],
  "ethnicitySubType": "Mexican",
  "ethnicityType": "Not Hispanic or Latino",
```

```
    "extendedFields": [],
    "externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
    "genderType": "Female",
    "hasMilitaryService": true,
    "incomes": [
      {
        "extendedFields": [],
        "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
        "incomeSourceType": "Capital Gains",
        "monthlyIncomeAmount": 100,
        "name": "Income1"
      }
    ],
    "isActiveMilitary": true,
    "isJointCredit": true,
    "isSurvivingMilitarySpouse": true,
    "maritalStatus": "Married",
    "militaryTourExpirationMonth": 2,
    "militaryTourExpirationYear": 2027,
    "name": "BR1",
    "otherAsianRaceSubType": "Indian",
    "otherEthnicitySubType": "Mexico",
    "otherPacIslandSubType": "Test Pacific Islander",
    "pacificIslanderSubType": "Native Hawaiian",
    "preferredLanguage": "English",
    "raceType": "Asian",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
  },
  {
    "addresses": [
      {
        "addressOwnership": "Rent",
        "extendedFields": [],
        "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
        "monthlyRentPayment": 5000,
        "name": "Addr2",
        "residenceAdditionalMonthCount": 24,
        "residenceAddress": {
          "city": "San Francisco",
          "country": "United States",
          "postalCode": "94115",
          "state": "CA",
          "street": "1500 Divisadero Street"
        },
        "residenceYearCount": 3,
        "residencyType": "Present Address"
      }
    ],
    "asianRaceSubType": "Asian Indian",
    "borrowerType": "CoBorrower",
    "citizenshipStatus": "U.S. Citizen",
    "declarations": [
```

```
    {
      "bankruptcyType": "Chapter 12",
      "borrowedAmount": 657575,
      "extendedFields": [],
      "externalId": "704e7cfd-932c-4a17-81ad-844fe1a007c6",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Primary Residence"
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "34,35",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 3,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "2300 Stockton Street"
      },
      "extendedFields": [],
      "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2400,
      "monthlyBonusAmount": 234,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 45668,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 394,
      "monthlyOvertimeAmount": 123,
      "name": "Empl2",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ],
```

```
      "ethnicitySubType": "Mexican",
      "ethnicityType": "Hispanic or Latino",
      "extendedFields": [],
      "externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
      "genderType": "Female",
      "hasMilitaryService": true,
      "incomes": [
        {
          "extendedFields": [],
          "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
          "incomeSourceType": "Child Support",
          "monthlyIncomeAmount": 200,
          "name": "Income1"
        }
      ],
      "isActiveMilitary": true,
      "isJointCredit": true,
      "isSurvivingMilitarySpouse": true,
      "maritalStatus": "Married",
      "militaryTourExpirationMonth": 3,
      "militaryTourExpirationYear": 2029,
      "name": "COB1",
      "otherAsianRaceSubType": "South india",
      "otherEthnicitySubType": "Mexico",
      "otherPacIslandSubType": "Test pacific Islander",
      "pacificIslanderSubType": "Guamanian or Chamorro",
      "preferredLanguage": "English",
      "raceType": "American Indian or Alaska Native",
      "tribeName": "Pacific Islander",
      "wasActiveMilitary": true,
      "wasNonActivatedService": true
    }
  ],
  "estateHoldType": "Fee Simple",
  "extendedFields": [],
  "externalId": "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
  "financials": [
    {
      "borrowerClosingCostAmt": 95956,
      "counselingAgencyProviderName": "Test provider",
      "counselingCompleteBorrName": "BR1",
      "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
      "creditFromSeller": 33342,
      "discountPointCostAmount": 59586,
      "estFirstMortgagePayment": 459677,
      "estHomeownerInsurancePayment": 35521,
      "estMortgageInsurancePayment": 2424555,
      "estOtherDuesPayment": 24354,
      "estOtherPayment": 323231,
      "estPropertyTaxesPayment": 422556,
      "estSubordinateLienPayment": 35453,
      "estSuppPropInsurancePayment": 44959,
      "extendedFields": [],
      "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
```

```
    "financeMortgageInsuranceAmt": 353,
    "hasCompletedCounseling": true,
    "hasHomeownerEducation": true,
    "homeEdCompletedBorrowerName": "BR1",
    "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
    "homeownerEdFormat": "Attended Workshop in Person",
    "housingCounselingFormat": "Face-to-Face",
    "hudApproveAgencyId": "12344",
    "hudApprovedProviderId": "3532",
    "landAcquiredSeparatelyAmount": 2040,
    "loanAmtExclFinMortgageInsurance": 33345,
    "name": "Fin1",
    "otherCredit": 2242,
    "otherNewMortgageLoanAmt": 253535,
    "outstandingLoanAmount": 24505056,
    "purchasePriceAmount": 150000,
    "remodelAndRepairsAmount": 3040
  }
],
"hasOtherLoanFeature": true,
"hasPrepaymentPenalty": true,
"improvementCost": 100,
"initialBuydownRate": 401,
"interestOnlyMonthCount": 4,
"interestRate": 4,
"isBalloon": true,
"isBorrowerInCommunityPropState": true,
"isConstructionToPermanent": true,
"isContractForDeed": true,
"isEnergyRelatedImprovement": true,
"isInterestOnly": true,
"isNegativeAmortization": true,
"isPropInCommunityPropState": true,
"isRenovation": true,
"isSingleClosing": true,
"isSubjectToPriorityLien": true,
"isTempIntRateBuydown": true,
"leaseHoldExpirationDate": "2019-10-31T19:00:00.000Z",
"liabilities": [
  {
    "accountNumber": "134234242",
    "accountType": "Revolving",
    "borrowersExternalIds": [
      "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
      "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
    ],
    "creditLimitAmount": 34353,
    "creditorName": "BOFA",
    "extendedFields": [],
    "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
    "isJointLiability": true,
    "liabilityClass": "Financial",
    "loanType": "Conventional",
    "monthlyPaymentAmount": 35353,
```

```
      "name": "Liab1",
      "otherLiabilityType": "Child Support",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 242
    },
    {
      "accountNumber": "464634123",
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "creditLimitAmount": 423465356,
      "creditorName": "CHase",
      "extendedFields": [],
      "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
      "isJointLiability": true,
      "liabilityClass": "Financial",
      "loanType": "Conventional",
      "monthlyPaymentAmount": 2423535,
      "name": "Liab2",
      "otherLiabilityType": "Alimony",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 553
    }
  ],
  "loanPurpose": "Purchase",
  "lotAcquiredDate": "2019-10-31T19:00:00.000Z",
  "lotOriginalCost": 200.3,
  "monthsBeforeFirstAdj": 2,
  "monthsBetweenAdjustments": 3,
  "mortgageLienType": "First Lien",
  "mortgageProgramType": "Conventional",
  "name": "Loan1",
  "nativeLandTenure": "Fee Simple (On a Reservation)",
  "otherAmortizationType": "Test Amortization type",
  "otherLoanFeature": "Test Loan Feature",
  "otherLoanPurpose": "Test Loan Purpose",
  "otherMortgageProgramType": "Test program",
  "otherRefinanceProgType": "Test Refinance",
  "prepayPenaltyTermMonth": 5,
  "projectType": "Cooperative",
  "properties": [
    {
      "esMonthlyRentalIncome": 400506,
      "esNetMonthlyRentalIncome": 304056,
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "isManufacturedHome": true,
      "isMixedUseProperty": true,
      "loanPurposeType": "Purchase",
      "name": "Prop1",
      "propertyUseType": "Primary Residence",
      "propertyValue": 50500555,
```

```
      "requestedLoanAmount": 5005000,
      "unitsFinancedCount": 5
    }
  ],
  "refinanceProgramType": "Full Documentation",
  "refinanceType": "No Cash Out",
  "status": "New",
  "titleHolders": [
    {
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "isCurrentTitleHolder": true,
      "name": "T1",
      "titleHolderName": "Times"
    }
  ],
  "titleType": "Joint Tenancy with Right of Survivorship",
  "trustTitleType": "Title Will be Held by an Inter Vivos (Living) Trust"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountId`	String	Account associated with the application.	Required if `opportunityId` isn't provided	48.0
`amortizationTerm`	Integer	Duration of the amortization in months.	Optional	48.0
`amortizationType`	String	Amortization type for loan.	Optional	48.0
`assets`	Asset Input[]	Represents details about the borrower's and co-borrower's current personal and real property.	Optional	48.0
`balloonTermMonths`	Integer	Number of months during which the cumulative loan must be repaid.	Optional	48.0
`borrowers`	Borrower Input[]	List of borrowers for a loan application.	Optional	48.0
`estateHoldType`	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Optional	48.0
`extendedFields`	Extended Fields Input[]	Represents custom fields related to a loan application.	Optional	48.0
`externalId`	String	Identifier assigned to imported data by external data source (if applicable).	Optional	48.0
`financials`	Financial Input[]	Represents transaction details for a loan application.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
hasOtherLoanFeature	Boolean	Indicates whether loan has other amortization feature.	Optional	48.0
hasPrepaymentPenalty	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Optional	48.0
improvementCost	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Optional	48.0
initialBuydownRate	Double	Initial lesser interest rate for the loan.	Optional	48.0
interestOnlyMonthCount	Integer	Number of months that loan payments are interest only.	Optional	48.0
interestRate	Double	Interest rate for loan.	Optional	48.0
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Optional	48.0
isBorrowerCommunityPropState	Boolean	Indicates whether borrower lives in community property state.	Optional	48.0
isConstructionPermanent	Boolean	Indicates whether at least one borrower lives in a community property state.	Optional	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds are to pay off balance due on a contract for deed or land contract.	Optional	48.0
isEnergyRelatedImprovement	Boolean	Indicates whether loan is to finance energy-related improvements.	Optional	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Optional	48.0
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Optional	48.0
isPropCommunityPropState	Boolean	Indicates whether property is located in a community property state.	Optional	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Optional	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
		closing. Once construction is complete, loan converts to a traditional mortgage.		
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Optional	48.0
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Optional	48.0
leaseholdExpirationDate	String	Date when leasehold expires if land is leased.	Optional	48.0
liabilities	Liability Input[]	Represents details about the borrower and co-borrower current liabilities.	Optional	48.0
loanPurpose	String	Purpose of the loan.	Optional	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Optional	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Optional	48.0
monthsBeforeFirstAdj	Integer	Initial period prior to first adjustment in months.	Optional	48.0
monthsBetweenAdjustments	Integer	Number of months before the first rate adjustment for an adjustable rate loan.	Optional	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Optional	48.0
mortgageProgramType	String	Type of mortgage program applied for.	Optional	48.0
name	String	Name of the residential loan application.	Required	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Optional	48.0
opportunityId	String	Opportunity associated with the application.	Required if `accountId` isn't provided	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Optional	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Optional	48.0
otherMortgageProgramType	String	Description of the other mortgage type.	Optional	48.0
otherRefinanceProgType	String	Refinance program name if other was specified.	Optional	48.0
prepayPenaltyTermMonth	Integer	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Optional	48.0
projectType	String	Specifies the type of project that the property belongs to.	Optional	48.0
properties	Property Input[]	Represents details of the property the loan application finances.	Optional	48.0
refinanceProgramType	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Optional	48.0
refinanceType	String	Refinance loan type.	Optional	48.0
status	String	Indicates the current status of the loan application.	Optional	48.0
titleHolders	Title Holder Input[]	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Optional	48.0
titleType	String	Way the borrower or borrowers take title for the loan.	Optional	48.0
trustTitleType	String	Title to be held in a living trust or a land trust.	Optional	48.0

Response body

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Error message, if any.	Small, 48.0	48.0
result	Mortgage Result[]	Representation of mortgage result.	Small, 48.0	48.0

Sample Response body

```
{
  "result" : {
    "assets" : [ {
```

```
    "externalId" : "df126729-19c0-4dc9-80c6-322bc6fb994c",
    "id" : "0cgRM0000000JABYA2"
  }, {
    "externalId" : "a57f5b81-477b-41a3-a647-5852562913e5",
    "id" : "0cgRM0000000JACYA2"
  } ],
  "borrowers" : [ {
    "addresses" : [ {
      "externalId" : "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "id" : "0cjRM000000008VYAQ"
    } ],
    "declarations" : [ {
      "externalId" : "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
      "id" : "0cVRM000000008f2AA"
    } ],
    "employments" : [ {
      "externalId" : "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
      "id" : "0ckRM00000000OhYAI"
    } ],
    "externalId" : "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
    "id" : "0cURM00000000K32AI",
    "incomes" : [ {
      "externalId" : "b19d9372-df99-4eec-9de0-ad785503992d",
      "id" : "0ciRM000000008GYAQ"
    } ]
  }, {
    "addresses" : [ {
      "externalId" : "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
      "id" : "0cjRM000000008WYAQ"
    } ],
    "declarations" : [ {
      "externalId" : "704e7cfd-932c-4a17-81ad-844fe1a007c6",
      "id" : "0cVRM000000008g2AA"
    } ],
    "employments" : [ {
      "externalId" : "34380cb7-95ca-4867-9a74-972af1be22db",
      "id" : "0ckRM00000000OiYAI"
    } ],
    "externalId" : "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
    "id" : "0cURM00000000K42AI",
    "incomes" : [ {
      "externalId" : "91027067-09d3-45f2-a0fc-217ce1f63458",
      "id" : "0ciRM000000008HYAQ"
    } ]
  } ],
  "externalId" : "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
  "financials" : [ {
    "externalId" : "af7e7c76-33ac-4005-b377-4b4663a49ec9",
    "id" : "0cCRM00000000812AA"
  } ],
  "id" : "0cdRM00000000sUYAQ",
  "liabilities" : [ {
    "externalId" : "df126729-19c0-4dc9-80c6-322bc6fb994c",
    "id" : "0chRM0000000HjJYAU"
```

```
    }, {
      "externalId" : "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
      "id" : "0chRM0000000HjKYAU"
    } ],
    "properties" : [ {
      "externalId" : "a57f5b81-477b-41a3-a647-5852562913e5",
      "id" : "0cPRM000000007c2AA"
    } ],
    "titleHolders" : [ {
      "externalId" : "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "id" : "0cTRM00000000Bf2AI"
    } ]
  }
}
```

Request Bodies

Here's a list of Financial Services Cloud Business API request bodies.

Address Input

Represents address details.

Borrower Address Input

Input representation for Borrower addresses.

Borrower Declaration Input

Input representation for Borrower declarations

Borrower Employment Input

Represents details about the borrower's or co-borrower's current and past employment.

Borrower Income Input

Input representation for Borrower income

Borrower Input

Represents details of the borrower or co-borrower for the loan application.

Mapper Input Representation

Represents the input representation for the Mapper POST method.

Extended Fields Input

Input representation for extended fields.

Asset Input

Represents details about the borrower's and co-borrower's current personal and real property.

Financial Input

Input details for the financial transaction.

Mortgage Input

Represents the input for mortgage POST or PATCH method.

Liability Input

Details about the borrower and co-borrower current liabilities.

Property Input

Represents details of the property the loan application finances.

Title Holder Input

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Address Input

Represents address details.

Root XML tag

`<address>`

JSON example

```
{
  "city": "San Francisco",
  "country": "United States",
  "postalCode": "94105",
  "state": "CA",
  "street": "50 Fremont Street"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`city`	String	The address city.	Optional	48.0
`country`	String	The address country.	Optional	48.0
`postalCode`	String	The address postal code.	Optional	48.0
`state`	String	The address state.	Optional	48.0
`street`	String	The address street.	Optional	48.0

Borrower Address Input

Input representation for Borrower addresses.

Root XML tag

`<addresses>`

JSON example

```
{
  "addresses": [
    {
      "addressOwnership": "Own",
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "monthlyRentPayment": 2300,
      "name": "Addr1",
      "residenceAdditionalMonthCount": 23,
```

```
      "residenceAddress": {
        "city": "San Francisco",
        "country": "United States",
        "postalCode": "94105",
        "state": "CA",
        "street": "50 Fremont Street"
      },
      "residenceYearCount": 3,
      "residencyType": "Former Residence"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
addressOwnership	String	Identifies borrower's status at residence.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the borrower's address.	Optional	48.0
externalId	String	Identifier assigned to imported borrower's address data by external data source. (if applicable)	Optional	48.0
id	String	ID of the borrower's address	Optional	48.0
monthlyRentPayment	Double	Borrower's monthly rent payment (if applicable).	Optional	48.0
name	String	Name of the borrower's address.	Optional	48.0
residenceAdditionalMthCount	Integer	Additional months borrower lived at this residence.	Optional	48.0
residenceAddress	Address Input[]	Residence's physical address.	Optional	48.0
residenceYearCount	Integer	Years borrower lived at this residence.	Optional	48.0
residencyType	String	Identifies borrower's current residency status.	Optional	48.0

Borrower Declaration Input

Input representation for Borrower declarations

Root XML tag

```
<declarations>
```

JSON example

```
{
  "declarations": [
    {
```

```
      "bankruptcyType": "Chapter 11",
      "borrowedAmount": 20000,
      "extendedFields": [],
      "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Secondary Residence"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`bankruptcyType`	String	Bankruptcy type or types (if applicable).	Optional	48.0
`borrowedAmount`	Double	Amount of money borrowed for loan application transaction.	Optional	48.0
`extendedFields`	Extended Fields Input[]	Custom fields related to the declaration.	Optional	48.0
`externalId`	String	Identifier assigned to imported financial data by external data source (if applicable).	Optional	48.0
`hasBorrowedMoney`	Boolean	Indicates whether borrower is borrowing money for loan application transaction.	Optional	48.0
`hasCoSignerUndisclosedDebt`	Boolean	Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.	Optional	48.0
`hasDeclaredBankruptcy`	Boolean	Indicates whether borrower declared bankruptcy within the past seven years.	Optional	48.0
`hasDeedSurrender`	Boolean	Indicates whether borrower conveyed title to a property in lieu of foreclosure in past seven years.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
hasOutstandingJudgment	Boolean	Indicates whether there are one or more outstanding judgments against the borrower.	Optional	48.0
hasOwnershipInterest	Boolean	Indicates whether borrower had ownership interest in a property in the last three years.	Optional	48.0
hasPastShortSale	Boolean	Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past seven years.	Optional	48.0
hasPropertyForeclosed	Boolean	Indicates whether borrower had property foreclosed upon in last seven years.	Optional	48.0
hasUndisclosedAdCreditApp	Boolean	Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.	Optional	48.0
hasUndisclosedOtherPropLoan	Boolean	Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.	Optional	48.0
id	String	ID of the borrower declaration.	Optional	48.0
isPartyToLawsuit	Boolean	Indicates whether borrower is party to lawsuit with potential personal financial liability.	Optional	48.0
isPresentlyDelinquent	Boolean	Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.	Optional	48.0
isPrimaryResidence	Boolean	Indicates whether property to be borrower's primary residence.	Optional	48.0
isRelatedToSeller	Boolean	Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).	Optional	48.0
isSubjectToPriorityLien	Boolean	Indicates whether application property is to have a priority clean energy lien like Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.	Optional	48.0
name	String	Name of the declaration.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
priorPropertyTitleType	String	Identifies how borrower held title in the ownership interest property.	Optional	48.0
priorPropertyUsageType	String	Identifies type of property borrower held ownership interest in.	Optional	48.0

Borrower Employment Input

Represents details about the borrower's or co-borrower's current and past employment.

Root XML tag

```
<employments>
```

JSON example

```
{
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 4,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "extendedFields": [],
      "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2300,
      "monthlyBonusAmount": 100,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 5000,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 10,
      "monthlyOvertimeAmount": 200,
      "name": "Empl1",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
currentJobAdditionalMthCount	Integer	Additional number of months employed at this job (less than 12).	Optional	48.0
currentJobYearCount	Integer	Number of full years employed at this job.	Optional	48.0
employerAddress	Address Input[]	Address of borrower's employer or business.	Optional	48.0
employerName	String	Name of borrower's employer or business.	Optional	48.0
employerPhone	String	Employer's phone number.	Optional	48.0
endDate	String	Borrower's last date of employment at this job.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the borrower's employment.	Optional	48.0
externalId	String	Identifier assigned to imported employer data by external data source. (if applicable)	Optional	48.0
id	String	ID of the borrower's employment.	Optional	48.0
isLessThanQuarterShare	Boolean	Indicates whether borrower owns less than 25% of this business (if applicable).	Optional	48.0
isRelToTransactionParty	Boolean	Indicates whether borrower is employed by a family member, property seller, real estate agent, or other person party to the loan application transaction.	Optional	48.0
isSelfEmployed	Boolean	Indicates whether borrower is self-employed or owns the business.	Optional	48.0
jobTitle	String	Borrower's job title or employer's business or industry type.	Optional	48.0
monthlyBaseIncomeAmount	Double	Borrower's monthly bonus from this job.	Optional	48.0
monthlyBonusAmount	Double	Borrower's monthly bonus from this job.	Optional	48.0
monthlyCommissionAmount	Double	Borrower's monthly commission from this job.	Optional	48.0
monthlyIncome	Double	Borrower's monthly income or loss from this business.	Optional	48.0
monthlyMilitaryEntitlementAmt	Double	Borrower's monthly military entitlement from this job.	Optional	48.0
monthlyOtherIncomeAmount	Double	Borrower's other monthly income from this job.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
monthlyOvertimeAmount	Double	Borrower's monthly overtime income from this job.	Optional	48.0
name	String	Name of the loan applicant employment.	Optional	48.0
startDate	String	Date borrower started working at this job.	Optional	48.0

Borrower Income Input

Input representation for Borrower income

Root XML tag

```
<incomes>
```

JSON example

```
{
  "incomes": [
    {
      "extendedFields": [],
      "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
      "incomeSourceType": "Capital Gains",
      "monthlyIncomeAmount": 100,
      "name": "Income1"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
extendedFields	Extended Fields Input[]	Custom fields related to the borrower's income.	Optional	48.0
externalId	String	Identifier assigned to imported income data by external data source (if applicable).	Optional	48.0
id	String	ID of the borrower's income.	Optional	48.0
incomeSourceType	String	Source of borrower's monthly non-employment income.	Optional	48.0
monthlyIncomeAmount	Double	Amount of borrower's monthly non-employment income from this source.	Optional	48.0
name	String	Name of the other monthly income.	Optional	48.0

Borrower Input

Represents details of the borrower or co-borrower for the loan application.

Root XML tag

```
<borrowers>
```

JSON example

```
{
  "borrowers": [
    {
      "addresses": [
        {
          "addressOwnership": "Own",
          "extendedFields": [],
          "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
          "monthlyRentPayment": 2300,
          "name": "Addr1",
          "residenceAdditionalMonthCount": 23,
          "residenceAddress": {
            "city": "San Francisco",
            "country": "United States",
            "postalCode": "94105",
            "state": "CA",
            "street": "50 Fremont Street"
          },
          "residenceYearCount": 3,
          "residencyType": "Former Residence"
        }
      ],
      "asianRaceSubType": "Asian Indian",
      "borrowerType": "Borrower",
      "citizenshipStatus": "U.S. Citizen",
      "declarations": [
        {
          "bankruptcyType": "Chapter 11",
          "borrowedAmount": 20000,
          "extendedFields": [],
          "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
          "hasBorrowedMoney": true,
          "hasCoSignerUndisclosedDebt": true,
          "hasDeclaredBankruptcy": true,
          "hasDeedSurrender": true,
          "hasOutstandingJudgement": true,
          "hasOwnershipInterest": true,
          "hasPastShortSale": true,
          "hasPropertyForeclosed": true,
          "hasUndisclosedAddCreditApp": true,
          "hasUndisclosedOtherPropLoan": true,
          "isPartyToLawsuit": true,
          "isPresentlyDelinquent": true,
          "isPrimaryResidence": true,
          "isRelatedToSeller": true,
          "name": "Decl1",
          "priorPropertyTitleType": "Yourself",
          "priorPropertyUsageType": "Secondary Residence"
        }
      ],
```

```
"dependentCount": 2,
"dependentsAge": "25,34",
"employments": [
  {
    "currentJobAdditionalMonthCount": 24,
    "currentJobYearCount": 4,
    "employerAddress": {
      "city": "Fresno",
      "country": "United States",
      "postalCode": "93721",
      "state": "CA",
      "street": "1500 Divisadero Street"
    },
    "extendedFields": [],
    "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
    "isRelToTransactionParty": true,
    "isLessThanQuarterShare": true,
    "isSelfEmployed": true,
    "jobTitle": "developer",
    "monthlyBaseIncomeAmount": 2300,
    "monthlyBonusAmount": 100,
    "monthlyCommissionAmount": 10,
    "monthlyIncome": 5000,
    "monthlyMilitaryEntitlementAmt": 20,
    "monthlyOtherIncomeAmount": 10,
    "monthlyOvertimeAmount": 200,
    "name": "Empl1",
    "startDate": "2019-10-10T03:11:27.000Z"
  }
],
"ethnicitySubType": "Mexican",
"ethnicityType": "Not Hispanic or Latino",
"extendedFields": [],
"externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
"genderType": "Female",
"hasMilitaryService": true,
"incomes": [
  {
    "extendedFields": [],
    "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
    "incomeSourceType": "Capital Gains",
    "monthlyIncomeAmount": 100,
    "name": "Income1"
  }
],
"isActiveMilitary": true,
"isJointCredit": true,
"isSurvivingMilitarySpouse": true,
"maritalStatus": "Married",
"militaryTourExpirationMonth": 2,
"militaryTourExpirationYear": 2027,
"name": "BR1",
"otherAsianRaceSubType": "Indian",
"otherEthnicitySubType": "Mexico",
```

```
    "otherPacIslandSubType": "Test Pacific Islander",
    "pacificIslanderSubType": "Native Hawaiian",
    "preferredLanguage": "English",
    "raceType": "Asian",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
  },
  {
    "addresses": [
      {
        "addressOwnership": "Rent",
        "extendedFields": [],
        "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
        "monthlyRentPayment": 5000,
        "name": "Addr2",
        "residenceAdditionalMonthCount": 24,
        "residenceAddress": {
          "city": "San Francisco",
          "country": "United States",
          "postalCode": "94115",
          "state": "CA",
          "street": "1500 Divisadero Street"
        },
        "residenceYearCount": 3,
        "residencyType": "Present Address"
      }
    ],
    "asianRaceSubType": "Asian Indian",
    "borrowerType": "CoBorrower",
    "citizenshipStatus": "U.S. Citizen",
    "declarations": [
      {
        "bankruptcyType": "Chapter 12",
        "borrowedAmount": 657575,
        "extendedFields": [],
        "externalId": "704e7cfd-932c-4a17-81ad-844fe1a007c6",
        "hasBorrowedMoney": true,
        "hasCoSignerUndisclosedDebt": true,
        "hasDeclaredBankruptcy": true,
        "hasDeedSurrender": true,
        "hasOutstandingJudgement": true,
        "hasOwnershipInterest": true,
        "hasPastShortSale": true,
        "hasPropertyForeclosed": true,
        "hasUndisclosedAddCreditApp": true,
        "hasUndisclosedOtherPropLoan": true,
        "isPartyToLawsuit": true,
        "isPresentlyDelinquent": true,
        "isPrimaryResidence": true,
        "isRelatedToSeller": true,
        "name": "Decl1",
        "priorPropertyTitleType": "Yourself",
        "priorPropertyUsageType": "Primary Residence"
```

```
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "34,35",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 3,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "2300 Stockton Street"
      },
      "extendedFields": [],
      "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2400,
      "monthlyBonusAmount": 234,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 45668,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 394,
      "monthlyOvertimeAmount": 123,
      "name": "Empl2",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ],
  "ethnicitySubType": "Mexican",
  "ethnicityType": "Hispanic or Latino",
  "extendedFields": [],
  "externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
  "genderType": "Female",
  "hasMilitaryService": true,
  "incomes": [
    {
      "extendedFields": [],
      "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
      "incomeSourceType": "Child Support",
      "monthlyIncomeAmount": 200,
      "name": "Income1"
    }
  ],
  "isActiveMilitary": true,
  "isJointCredit": true,
  "isSurvivingMilitarySpouse": true,
  "maritalStatus": "Married",
  "militaryTourExpirationMonth": 3,
  "militaryTourExpirationYear": 2029,
  "name": "COB1",
```

```
      "otherAsianRaceSubType": "South india",
      "otherEthnicitySubType": "Mexico",
      "otherPacIslandSubType": "Test pacific Islander",
      "pacificIslanderSubType": "Guamanian or Chamorro",
      "preferredLanguage": "English",
      "raceType": "American Indian or Alaska Native",
      "tribeName": "Pacific Islander",
      "wasActiveMilitary": true,
      "wasNonActivatedService": true
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`addresses`	Borrower Address Input[]	Borrower's addresses.	Optional	48.0
`asianRaceSubType`	String	Borrower's Asian race.	Optional	48.0
`borrowerType`	String	Applicant's borrower type.	Optional	48.0
`citizenshipStatus`	String	Borrower's citizenship status.	Optional	48.0
`contactId`	String	Contact associated with this borrower.	Optional	48.0
`declarations`	Borrower Declaration Input[]	Borrower's declarations.	Optional	48.0
`dependentCount`	Integer	Borrower's number of dependents.	Optional	48.0
`dependentsAge`	String	Ages of borrower's dependents in a comma-separated list.	Optional	48.0
`employments`	Borrower Employment Input[]	Borrower's employments.	Optional	48.0
`ethnicitySubType`	String	Borrower's ethnicity.	Optional	48.0
`ethnicityType`	String	Borrower's ethnicity origin.	Optional	48.0
`extendedFields`	Extended Fields Input[]	Custom fields.	Optional	48.0
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Optional	48.0
`genderType`	String	Borrower's gender.	Optional	48.0
`hasMilitaryService`	Boolean	Indicates whether the borrower is serving in the United States Armed Forces or the borrower or the borrower's deceased spouse served in the past.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the borrower.	Optional	48.0
incomes	Borrower Income Input[]	Borrower's incomes.	Optional	48.0
isActiveMilitary	Boolean	Indicates whether borrower is currently on active duty with the United States Armed Forces.	Optional	48.0
isJointCredit	Boolean	Indicates whether borrower is applying for joint credit.	Optional	48.0
isSurvivingMilitarySpouse	Boolean	Indicates whether borrower is a surviving spouse of a veteran.	Optional	48.0
maritalStatus	String	Borrower's marital status.	Optional	48.0
militaryTourExpirationMonth	Integer	Month that borrower's tour of service expires.	Optional	48.0
militaryTourExpirationYear	Integer	Year that borrower's tour of service expires.	Optional	48.0
name	String	Name of the borrower.	Optional	48.0
otherAsianRaceSubType	String	Borrower's Asian race if other is specified.	Optional	48.0
otherEthnicitySubType	String	Borrower's ethnicity if other is specified.	Optional	48.0
otherPacIslandSubType	String	Borrower's native Hawaiian or Pacific Islander race if other is specified.	Optional	48.0
pacificIslanderSubType	String	Borrower's native Hawaiian or Pacific Islander race.	Optional	48.0
preferredLanguage	String	Borrower's preferred communication language.	Optional	48.0
raceType	String	Borrower's race.	Optional	48.0
tribeName	String	Name of borrower's enrolled or principal tribe.	Optional	48.0
wasActiveMilitary	Boolean	Indicates whether borrower is currently retired, discharged, or separated from active military duty.	Optional	48.0
wasNonActivatedService	Boolean	Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.	Optional	48.0

Mapper Input Representation

Represents the input representation for the Mapper POST method.

JSON example

```
{
  "recordId": "0cdB0000000CbVGIA0"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordId	String	ID of the residential loan application.	Required	49.0

Extended Fields Input

Input representation for extended fields.

Root XML tag

```
<extendedFields>
```

JSON example

```
{
  "extendedFields": [
    {
      "name": "assigned_to",
      "value": "abcd"
    },
    {
      "name": "ownership",
      "value": true
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the custom field.	Optional	48.0
value	String	Value of the custom field.	Optional	48.0

Asset Input

Represents details about the borrower's and co-borrower's current personal and real property.

Root XML tag

```
<assets>
```

JSON example


```
{
  "assets": [
    {
      "accountNumber": "849393",
      "accountType": "Checking",
      "assetClass": "Financial",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 434934903,
      "dispositionType": "Pending Sale",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "financialInstitutionName": "BOFA",
      "grossMonthlyRentalIncome": 355395355,
      "name": "Asset1",
      "netMonthlyRentalIncome": 2535345,
      "presentMarketValue": 7937399,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
      },
      "realEstateMonthlyExpense": 3413131
    },
    {
      "accountNumber": "2424242424",
      "accountType": "Checking",
      "assetClass": "Real Estate",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 24424525,
      "dispositionType": "Sold",
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "financialInstitutionName": "wells",
      "grossMonthlyRentalIncome": 24242224,
      "name": "Asset2",
      "netMonthlyRentalIncome": 242424234,
      "presentMarketValue": 2423131313,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "123 2nd Street"
      },
      "realEstateMonthlyExpense": 2242423424
    }
```

```
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountNumber	String	Account number associated with financial institution holding asset.	Optional	48.0
accountType	String	Identifies asset account type.	Optional	48.0
assetClass	String	Identifies which asset class total to include the asset's value in.	Optional	48.0
assetType	String	Identifies type of other asset.	Optional	48.0
borrowersExternalIds	String[]	External IDs of borrower and co-borrowers.	Optional	48.0
borrowersIds	String[]	IDs of borrower and co-borrowers.	Optional	48.0
cashOrMarketValue	Double	Asset's cash or current market value.	Optional	48.0
dispositionType	String	Real estate asset's planned future use.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the asset.	Optional	48.0
externalId	String	Identifier assigned to imported asset data by external data source (if applicable).	Optional	48.0
financialInstitutionName	String	Name of financial institution where financial account is held.	Optional	48.0
grossMonthlyRentalIncome	Double	Borrower's monthly rent income collected on real estate asset.	Optional	48.0
id	String	ID of the asset.	Optional	48.0
isJointAsset	Boolean	Indicates whether asset is held jointly.	Optional	48.0
name	String	Name of the loan application asset.	Optional	48.0
netMonthlyRentalIncome	Double	Borrower's net monthly income on real estate asset.	Optional	48.0
presentMarketValue	Double	Cash value of real estate asset if sold today.	Optional	48.0
realEstateAddress	Address Input[]	Real estate asset's address.	Optional	48.0
realEstateMonthlyExpense	Double	Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.	Optional	48.0

Financial Input

Input details for the financial transaction.

Root XML tag

```
<financials>
```

JSON example


```
{
  "financials": [
    {
      "borrowerClosingCostAmt": 95956,
      "counselingAgencyProviderName": "Test provider",
      "counselingCompleteBorrName": "BR1",
      "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
      "creditFromSeller": 33342,
      "discountPointCostAmount": 59586,
      "estFirstMortgagePayment": 459677,
      "estHomeownerInsurancePayment": 35521,
      "estMortgageInsurancePayment": 2424555,
      "estOtherDuesPayment": 24354,
      "estOtherPayment": 323231,
      "estPropertyTaxesPayment": 422556,
      "estSubordinateLienPayment": 35453,
      "estSuppPropInsurancePayment": 44959,
      "extendedFields": [],
      "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
      "financeMortgageInsuranceAmt": 353,
      "hasCompletedCounseling": true,
      "hasHomeownerEducation": true,
      "homeEdCompletedBorrowerName": "BR1",
      "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
      "homeownerEdFormat": "Attended Workshop in Person",
      "housingCounselingFormat": "Face-to-Face",
      "hudApproveAgencyId": "12344",
      "hudApprovedProviderId": "3532",
      "landAcquiredSeparatelyAmount": 2040,
      "loanAmtExclFinMortgageInsurance": 33345,
      "name": "Fin1",
      "otherCredit": 2242,
      "otherNewMortgageLoanAmt": 253535,
      "outstandingLoanAmount": 24505056,
      "purchasePriceAmount": 150000,
      "remodelAndRepairsAmount": 3040
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
borrowerClosingCostAmt	Double	Total closing costs due from borrower, including prepaid and initial escrow payments.	Optional	48.0
counselingAgencyName	String	Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown.	Optional	48.0
counselingAgencyProviderName	String	Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.	Optional	48.0
counselingCompleteBorrName	String	Name of borrower or borrowers who completed housing counseling.	Optional	48.0
counselingCompletionDate	String	Date borrower completed housing counseling.	Optional	48.0
creditFromSeller	Double	Total amount of closing costs due from seller.	Optional	48.0
discountPointCostAmount	Double	Total cost of discount points purchased by the borrower due at closing.	Optional	48.0
estFirstMortgagePayment	Double	Proposed monthly first mortgage payment for loan application property, including principal and interest.	Optional	48.0
estHomeownerInsurancePayment	Double	Proposed monthly payment for homeowners insurance on application property.	Optional	48.0
estMortgageInsurancePayment	Double	Proposed monthly mortgage insurance payment on application property.	Optional	48.0
estOtherDuesPayment	Double	Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.	Optional	48.0
estOtherPayment	Double	Proposed total monthly payment for other housing expenses on application property.	Optional	48.0
estPropertyTaxesPayment	Double	Proposed monthly payment for real estate taxes on application property.	Optional	48.0
estSubordinateLienPayment	Double	Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
estSupPropInsurancePaymt	Double	Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the transaction.	Optional	48.0
externalId	String	Identifier assigned to imported financial data by external data source (if applicable).	Optional	48.0
financedMtgInsuranceAmt	Double	Total amount of financed mortgage insurance or financed mortgage insurance equivalent.	Optional	48.0
hasCompletedCounseling	Boolean	Indicates whether one or more borrowers completed housing counseling within the last 12 months.	Optional	48.0
hasHomeownerEducation	Boolean	Indicates whether one or more borrowers completed homeownership education within the last 12 months.	Optional	48.0
homeEdCompletedBorrowerNm	String	Name of borrower or borrowers who completed homeownership education.	Optional	48.0
homeownerEdCompleteDate	String	Date borrower completed homeownership education.	Optional	48.0
homeownerEdFormat	String	Indicates the format of homeownership education attended by borrower.	Optional	48.0
housingCounselingFormat	String	Indicates the format of the housing counseling completed by borrower.	Optional	48.0
hudApproveAgencyId	String	Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.	Optional	48.0
hudApprovedProviderId	String	Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.	Optional	48.0
id	String	ID of the loan application financial.	Optional	48.0
landAcquiredSeparatelyAmt	Double	Price of land if purchased separately from the building or structure.	Optional	48.0
loanAmtExclFinMtgInsurance	Double	Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.	Optional	48.0
name	String	Name of the loan application financial.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
otherCredit	Double	Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.	Optional	48.0
otherNewMortgageLoanAmt	Double	Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.	Optional	48.0
outstandingLoanAmount	Double	Total amount of all mortgage loans on application property to be paid off by refinance loan.	Optional	48.0
purchasePriceAmount	Double	Purchase price for the property.	Optional	48.0
remodelAndRepairsAmount	Double	Cost of any alterations, improvements, and repairs on the property.	Optional	48.0

Mortgage Input

Represents the input for mortgage POST or PATCH method.

JSON example

```
{
  "accountId": "001RM000004XraFYAS",
  "amortizationTerm": 30,
  "amortizationType": "Adjustable Rate",
  "assets": [
    {
      "accountNumber": "849393",
      "accountType": "Checking",
      "assetClass": "Financial",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 434934903,
      "dispositionType": "Pending Sale",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "financialInstitutionName": "BOFA",
      "grossMonthlyRentalIncome": 355395355,
      "name": "Asset1",
      "netMonthlyRentalIncome": 2535345,
      "presentMarketValue": 7937399,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "234 1st Street"
      },
```

```
      "realEstateMonthlyExpense": 3413131
    },
    {
      "accountNumber": "2424242424",
      "accountType": "Checking",
      "assetClass": "Real Estate",
      "assetType": "Earnest Money",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "cashOrMarketValue": 24424525,
      "dispositionType": "Sold",
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "financialInstitutionName": "wells",
      "grossMonthlyRentalIncome": 24242224,
      "name": "Asset2",
      "netMonthlyRentalIncome": 242424234,
      "presentMarketValue": 2423131313,
      "realEstateAddress": {
        "city": "San Francisco",
        "country": "CA",
        "street": "123 2nd Street"
      },
      "realEstateMonthlyExpense": 2242423424
    }
  ],
  "balloonTermMonths": 3,
  "borrowers": [
    {
      "addresses": [
        {
          "addressOwnership": "Own",
          "extendedFields": [],
          "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
          "monthlyRentPayment": 2300,
          "name": "Addr1",
          "residenceAdditionalMonthCount": 23,
          "residenceAddress": {
            "city": "San Francisco",
            "country": "United States",
            "postalCode": "94105",
            "state": "CA",
            "street": "50 Fremont Street"
          },
          "residenceYearCount": 3,
          "residencyType": "Former Residence"
        }
      ],
      "asianRaceSubType": "Asian Indian",
      "borrowerType": "Borrower",
      "citizenshipStatus": "U.S. Citizen",
      "declarations": [
```

```
    {
      "bankruptcyType": "Chapter 11",
      "borrowedAmount": 20000,
      "extendedFields": [],
      "externalId": "be71c372-8290-44dc-bb73-6f6d1ce7e9a9",
      "hasBorrowedMoney": true,
      "hasCoSignerUndisclosedDebt": true,
      "hasDeclaredBankruptcy": true,
      "hasDeedSurrender": true,
      "hasOutstandingJudgement": true,
      "hasOwnershipInterest": true,
      "hasPastShortSale": true,
      "hasPropertyForeclosed": true,
      "hasUndisclosedAddCreditApp": true,
      "hasUndisclosedOtherPropLoan": true,
      "isPartyToLawsuit": true,
      "isPresentlyDelinquent": true,
      "isPrimaryResidence": true,
      "isRelatedToSeller": true,
      "name": "Decl1",
      "priorPropertyTitleType": "Yourself",
      "priorPropertyUsageType": "Secondary Residence"
    }
  ],
  "dependentCount": 2,
  "dependentsAge": "25,34",
  "employments": [
    {
      "currentJobAdditionalMonthCount": 24,
      "currentJobYearCount": 4,
      "employerAddress": {
        "city": "Fresno",
        "country": "United States",
        "postalCode": "93721",
        "state": "CA",
        "street": "1500 Divisadero Street"
      },
      "extendedFields": [],
      "externalId": "2a9460d0-3194-449a-8bf0-488a6cbaed0a",
      "isRelToTransactionParty": true,
      "isLessThanQuarterShare": true,
      "isSelfEmployed": true,
      "jobTitle": "developer",
      "monthlyBaseIncomeAmount": 2300,
      "monthlyBonusAmount": 100,
      "monthlyCommissionAmount": 10,
      "monthlyIncome": 5000,
      "monthlyMilitaryEntitlementAmt": 20,
      "monthlyOtherIncomeAmount": 10,
      "monthlyOvertimeAmount": 200,
      "name": "Empl1",
      "startDate": "2019-10-10T03:11:27.000Z"
    }
  ],
```

```
    "ethnicitySubType": "Mexican",
    "ethnicityType": "Not Hispanic or Latino",
    "extendedFields": [],
    "externalId": "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
    "genderType": "Female",
    "hasMilitaryService": true,
    "incomes": [
      {
        "extendedFields": [],
        "externalId": "b19d9372-df99-4eec-9de0-ad785503992d",
        "incomeSourceType": "Capital Gains",
        "monthlyIncomeAmount": 100,
        "name": "Income1"
      }
    ],
    "isActiveMilitary": true,
    "isJointCredit": true,
    "isSurvivingMilitarySpouse": true,
    "maritalStatus": "Married",
    "militaryTourExpirationMonth": 2,
    "militaryTourExpirationYear": 2027,
    "name": "BR1",
    "otherAsianRaceSubType": "Indian",
    "otherEthnicitySubType": "Mexico",
    "otherPacIslandSubType": "Test Pacific Islander",
    "pacificIslanderSubType": "Native Hawaiian",
    "preferredLanguage": "English",
    "raceType": "Asian",
    "tribeName": "Pacific Islander",
    "wasActiveMilitary": true,
    "wasNonActivatedService": true
  },
  {
    "addresses": [
      {
        "addressOwnership": "Rent",
        "extendedFields": [],
        "externalId": "86c168dd-a29c-4c0b-b366-51a40cd66c4b",
        "monthlyRentPayment": 5000,
        "name": "Addr2",
        "residenceAdditionalMonthCount": 24,
        "residenceAddress": {
          "city": "San Francisco",
          "country": "United States",
          "postalCode": "94115",
          "state": "CA",
          "street": "1500 Divisadero Street"
        },
        "residenceYearCount": 3,
        "residencyType": "Present Address"
      }
    ],
    "asianRaceSubType": "Asian Indian",
    "borrowerType": "CoBorrower",
```

```
"citizenshipStatus": "U.S. Citizen",
"declarations": [
  {
    "bankruptcyType": "Chapter 12",
    "borrowedAmount": 657575,
    "extendedFields": [],
    "externalId": "704e7cfd-932c-4a17-81ad-844fe1a007c6",
    "hasBorrowedMoney": true,
    "hasCoSignerUndisclosedDebt": true,
    "hasDeclaredBankruptcy": true,
    "hasDeedSurrender": true,
    "hasOutstandingJudgement": true,
    "hasOwnershipInterest": true,
    "hasPastShortSale": true,
    "hasPropertyForeclosed": true,
    "hasUndisclosedAddCreditApp": true,
    "hasUndisclosedOtherPropLoan": true,
    "isPartyToLawsuit": true,
    "isPresentlyDelinquent": true,
    "isPrimaryResidence": true,
    "isRelatedToSeller": true,
    "name": "Decl1",
    "priorPropertyTitleType": "Yourself",
    "priorPropertyUsageType": "Primary Residence"
  }
],
"dependentCount": 2,
"dependentsAge": "34,35",
"employments": [
  {
    "currentJobAdditionalMonthCount": 24,
    "currentJobYearCount": 3,
    "employerAddress": {
      "city": "Fresno",
      "country": "United States",
      "postalCode": "93721",
      "state": "CA",
      "street": "2300 Stockton Street"
    },
    "extendedFields": [],
    "externalId": "34380cb7-95ca-4867-9a74-972af1be22db",
    "isRelToTransactionParty": true,
    "isLessThanQuarterShare": true,
    "isSelfEmployed": true,
    "jobTitle": "developer",
    "monthlyBaseIncomeAmount": 2400,
    "monthlyBonusAmount": 234,
    "monthlyCommissionAmount": 10,
    "monthlyIncome": 45668,
    "monthlyMilitaryEntitlementAmt": 20,
    "monthlyOtherIncomeAmount": 394,
    "monthlyOvertimeAmount": 123,
    "name": "Empl2",
    "startDate": "2019-10-10T03:11:27.000Z"
```

```
        }
      ],
      "ethnicitySubType": "Mexican",
      "ethnicityType": "Hispanic or Latino",
      "extendedFields": [],
      "externalId": "732c3d7e-78ae-4b5e-944d-f411fb4011d4",
      "genderType": "Female",
      "hasMilitaryService": true,
      "incomes": [
        {
          "extendedFields": [],
          "externalId": "91027067-09d3-45f2-a0fc-217ce1f63458",
          "incomeSourceType": "Child Support",
          "monthlyIncomeAmount": 200,
          "name": "Income1"
        }
      ],
      "isActiveMilitary": true,
      "isJointCredit": true,
      "isSurvivingMilitarySpouse": true,
      "maritalStatus": "Married",
      "militaryTourExpirationMonth": 3,
      "militaryTourExpirationYear": 2029,
      "name": "COB1",
      "otherAsianRaceSubType": "South india",
      "otherEthnicitySubType": "Mexico",
      "otherPacIslandSubType": "Test pacific Islander",
      "pacificIslanderSubType": "Guamanian or Chamorro",
      "preferredLanguage": "English",
      "raceType": "American Indian or Alaska Native",
      "tribeName": "Pacific Islander",
      "wasActiveMilitary": true,
      "wasNonActivatedService": true
    }
  ],
  "estateHoldType": "Fee Simple",
  "extendedFields": [],
  "externalId": "0c4a3933-47d3-43d5-a2e6-09ae10e11a5e",
  "financials": [
    {
      "borrowerClosingCostAmt": 95956,
      "counselingAgencyProviderName": "Test provider",
      "counselingCompleteBorrName": "BR1",
      "counselingCompletionDate": "2019-10-31T19:00:00.000Z",
      "creditFromSeller": 33342,
      "discountPointCostAmount": 59586,
      "estFirstMortgagePayment": 459677,
      "estHomeownerInsurancePayment": 35521,
      "estMortgageInsurancePayment": 2424555,
      "estOtherDuesPayment": 24354,
      "estOtherPayment": 323231,
      "estPropertyTaxesPayment": 422556,
      "estSubordinateLienPayment": 35453,
      "estSuppPropInsurancePayment": 44959,
```

```
      "extendedFields": [],
      "externalId": "af7e7c76-33ac-4005-b377-4b4663a49ec9",
      "financeMortgageInsuranceAmt": 353,
      "hasCompletedCounseling": true,
      "hasHomeownerEducation": true,
      "homeEdCompletedBorrowerName": "BR1",
      "homeownerEdCompleteDate": "2019-10-24T19:00:00.000Z",
      "homeownerEdFormat": "Attended Workshop in Person",
      "housingCounselingFormat": "Face-to-Face",
      "hudApproveAgencyId": "12344",
      "hudApprovedProviderId": "3532",
      "landAcquiredSeparatelyAmount": 2040,
      "loanAmtExclFinMortgageInsurance": 33345,
      "name": "Fin1",
      "otherCredit": 2242,
      "otherNewMortgageLoanAmt": 253535,
      "outstandingLoanAmount": 24505056,
      "purchasePriceAmount": 150000,
      "remodelAndRepairsAmount": 3040
    }
  ],
  "hasOtherLoanFeature": true,
  "hasPrepaymentPenalty": true,
  "improvementCost": 100,
  "initialBuydownRate": 401,
  "interestOnlyMonthCount": 4,
  "interestRate": 4,
  "isBalloon": true,
  "isBorrowerInCommunityPropState": true,
  "isConstructionToPermanent": true,
  "isContractForDeed": true,
  "isEnergyRelatedImprovement": true,
  "isInterestOnly": true,
  "isNegativeAmortization": true,
  "isPropInCommunityPropState": true,
  "isRenovation": true,
  "isSingleClosing": true,
  "isSubjectToPriorityLien": true,
  "isTempIntRateBuydown": true,
  "leaseHoldExpirationDate": "2019-10-31T19:00:00.000Z",
  "liabilities": [
    {
      "accountNumber": "134234242",
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "creditLimitAmount": 34353,
      "creditorName": "BOFA",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "isJointLiability": true,
      "liabilityClass": "Financial",
```

```
      "loanType": "Conventional",
      "monthlyPaymentAmount": 35353,
      "name": "Liab1",
      "otherLiabilityType": "Child Support",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 242
    },
    {
      "accountNumber": "464634123",
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "creditLimitAmount": 423465356,
      "creditorName": "CHase",
      "extendedFields": [],
      "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
      "isJointLiability": true,
      "liabilityClass": "Financial",
      "loanType": "Conventional",
      "monthlyPaymentAmount": 2423535,
      "name": "Liab2",
      "otherLiabilityType": "Alimony",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 553
    }
  ],
  "loanPurpose": "Purchase",
  "lotAcquiredDate": "2019-10-31T19:00:00.000Z",
  "lotOriginalCost": 200.3,
  "monthsBeforeFirstAdj": 2,
  "monthsBetweenAdjustments": 3,
  "mortgageLienType": "First Lien",
  "mortgageProgramType": "Conventional",
  "name": "Loan1",
  "nativeLandTenure": "Fee Simple (On a Reservation)",
  "otherAmortizationType": "Test Amortization type",
  "otherLoanFeature": "Test Loan Feature",
  "otherLoanPurpose": "Test Loan Purpose",
  "otherMortgageProgramType": "Test program",
  "otherRefinanceProgType": "Test Refinance",
  "prepayPenaltyTermMonth": 5,
  "projectType": "Cooperative",
  "properties": [
    {
      "esMonthlyRentalIncome": 400506,
      "esNetMonthlyRentalIncome": 304056,
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "isManufacturedHome": true,
      "isMixedUseProperty": true,
      "loanPurposeType": "Purchase",
      "name": "Prop1",
```

```
      "propertyUseType": "Primary Residence",
      "propertyValue": 50500555,
      "requestedLoanAmount": 5005000,
      "unitsFinancedCount": 5
    }
  ],
  "refinanceProgramType": "Full Documentation",
  "refinanceType": "No Cash Out",
  "status": "New",
  "titleHolders": [
    {
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "isCurrentTitleHolder": true,
      "name": "T1",
      "titleHolderName": "Times"
    }
  ],
  "titleType": "Joint Tenancy with Right of Survivorship",
  "trustTitleType": "Title Will be Held by an Inter Vivos (Living) Trust"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountId`	String	Account associated with the application.	Required if `opportunityId` isn't provided	48.0
`amortizationTerm`	Integer	Duration of the amortization in months.	Optional	48.0
`amortizationType`	String	Amortization type for loan.	Optional	48.0
`assets`	Asset Input[]	Represents details about the borrower's and co-borrower's current personal and real property.	Optional	48.0
`balloonTermMonths`	Integer	Number of months during which the cumulative loan must be repaid.	Optional	48.0
`borrowers`	Borrower Input[]	List of borrowers for a loan application.	Optional	48.0
`estateHoldType`	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Optional	48.0
`extendedFields`	Extended Fields Input[]	Represents custom fields related to a loan application.	Optional	48.0
`externalId`	String	Identifier assigned to imported data by external data source (if applicable).	Optional	48.0
`financials`	Financial Input[]	Represents transaction details for a loan application.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
hasOtherLoanFeature	Boolean	Indicates whether loan has other amortization feature.	Optional	48.0
hasPrepaymentPenalty	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Optional	48.0
improvementCost	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Optional	48.0
initialBuydownRate	Double	Initial lesser interest rate for the loan.	Optional	48.0
interestOnlyMonthCount	Integer	Number of months that loan payments are interest only.	Optional	48.0
interestRate	Double	Interest rate for loan.	Optional	48.0
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Optional	48.0
isBorrowerInCommunityPropState	Boolean	Indicates whether borrower lives in community property state.	Optional	48.0
isConstructionToPermanent	Boolean	Indicates whether at least one borrower lives in a community property state.	Optional	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds are to pay off balance due on a contract for deed or land contract.	Optional	48.0
isEnergyRelatedImprovement	Boolean	Indicates whether loan is to finance energy-related improvements.	Optional	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Optional	48.0
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Optional	48.0
isPropInCommunityPropState	Boolean	Indicates whether property is located in a community property state.	Optional	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Optional	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
		closing. Once construction is complete, loan converts to a traditional mortgage.		
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Optional	48.0
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Optional	48.0
leaseHoldExpirationDate	String	Date when leasehold expires if land is leased.	Optional	48.0
liabilities	Liability Input[]	Represents details about the borrower and co-borrower current liabilities.	Optional	48.0
loanPurpose	String	Purpose of the loan.	Optional	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Optional	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Optional	48.0
monthsBeforeFirstAdj	Integer	Initial period prior to first adjustment in months.	Optional	48.0
monthsBetweenAdjustments	Integer	Number of months before the first rate adjustment for an adjustable rate loan.	Optional	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Optional	48.0
mortgageProgramType	String	Type of mortgage program applied for.	Optional	48.0
name	String	Name of the residential loan application.	Required	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Optional	48.0
opportunityId	String	Opportunity associated with the application.	Required if `accountId` isn't provided	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Optional	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Optional	48.0
otherMortgageProgramType	String	Description of the other mortgage type.	Optional	48.0
otherRefinanceProgType	String	Refinance program name if other was specified.	Optional	48.0
prepayPenaltyTermMonth	Integer	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Optional	48.0
projectType	String	Specifies the type of project that the property belongs to.	Optional	48.0
properties	Property Input[]	Represents details of the property the loan application finances.	Optional	48.0
refinanceProgramType	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Optional	48.0
refinanceType	String	Refinance loan type.	Optional	48.0
status	String	Indicates the current status of the loan application.	Optional	48.0
titleHolders	Title Holder Input[]	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Optional	48.0
titleType	String	Way the borrower or borrowers take title for the loan.	Optional	48.0
trustTitleType	String	Title to be held in a living trust or a land trust.	Optional	48.0

Liability Input

Details about the borrower and co-borrower current liabilities.

Root XML tag

```
<liabilities>
```

JSON example

```
{
  "liabilities": [
    {
      "accountNumber": "134234242",
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
```

```
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "creditLimitAmount": 34353,
      "creditorName": "BOFA",
      "extendedFields": [],
      "externalId": "df126729-19c0-4dc9-80c6-322bc6fb994c",
      "isJointLiability": true,
      "liabilityClass": "Financial",
      "loanType": "Conventional",
      "monthlyPaymentAmount": 35353,
      "name": "Liab1",
      "otherLiabilityType": "Child Support",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 242
    },
    {
      "accountNumber": "464634123",
      "accountType": "Revolving",
      "borrowersExternalIds": [
        "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
        "732c3d7e-78ae-4b5e-944d-f411fb4011d4"
      ],
      "creditLimitAmount": 423465356,
      "creditorName": "CHase",
      "extendedFields": [],
      "externalId": "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
      "isJointLiability": true,
      "liabilityClass": "Financial",
      "loanType": "Conventional",
      "monthlyPaymentAmount": 2423535,
      "name": "Liab2",
      "otherLiabilityType": "Alimony",
      "shouldBePaidInFull": true,
      "unpaidBalanceAmount": 553
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountNumber`	String	Borrower's account number with lender or creditor.	Optional	48.0
`accountType`	String	Personal debt borrower owes like credit card balances, other debts, and leases.	Optional	48.0
`assetExternalId`	String	Identifier assigned to imported asset data by external data source (if applicable).	Optional	48.0
`assetId`	String	ID of the asset.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
borrowersExternalIds	String[]	Identifier assigned to imported borrowers data by external data source (if applicable).	Optional	48.0
borrowersIds	String[]	IDs of the borrowers.	Optional	48.0
creditLimitAmount	Double	Credit limit of real estate loan or line of credit.	Optional	48.0
creditorName	String	Lender or creditor owed the debt.	Optional	48.0
extendedFields	Extended Fields Input[]	Custom fields related to the asset.	Optional	48.0
externalId	String	Identifier assigned to imported liability data by external data source (if applicable).	Optional	48.0
id	String	ID of the liability.	Optional	48.0
isJointLiability	Boolean	Indicates whether borrower holds liability jointly.	Optional	48.0
liabilityClass	String	Include the liability's monthly payment in this liability class monthly payment total.	Optional	48.0
loanType	String	Existing real estate loan type.	Optional	48.0
monthlyPaymentAmount	Double	Borrower's monthly payment required to keep debt account current.	Optional	48.0
name	String	Name of the liability.	Optional	48.0
otherLiabilityType	String	Identifies type of other borrower expense or liability.	Optional	48.0
shouldBePaidInFull	Boolean	Indicates whether borrower to pay off debt on or before closing.	Optional	48.0
unpaidBalanceAmount	Double	Unpaid liability balance when borrower completed loan application.	Optional	48.0

Property Input

Represents details of the property the loan application finances.

Root XML tag

```
<properties>
```

JSON example

```
{
  "properties": [
    {
      "esMonthlyRentalIncome": 400506,
      "esNetMonthlyRentalIncome": 304056,
```

```
      "extendedFields": [],
      "externalId": "a57f5b81-477b-41a3-a647-5852562913e5",
      "isManufacturedHome": true,
      "isMixedUseProperty": true,
      "loanPurposeType": "Purchase",
      "name": "Prop1",
      "propertyUseType": "Primary Residence",
      "propertyValue": 50500555,
      "requestedLoanAmount": 5005000,
      "unitsFinancedCount": 5
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`esMonthlyRentalIncome`	Double	Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.	Optional	48.0
`esNetMonthlyRentalIncome`	Double	Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.	Optional	48.0
`extendedFields`	Extended Fields Input[]	Custom fields related to the property.	Optional	48.0
`externalId`	String	Identifier assigned to imported property data by external data source (if applicable).	Optional	48.0
`id`	String	ID of the property.	Optional	48.0
`isManufacturedHome`	Boolean	Indicates whether application property is a manufactured home.	Optional	48.0
`isMixedUseProperty`	Boolean	Indicates whether application property includes commercial space set aside for business use.	Optional	48.0
`loanPurposeType`	String	What the borrower will use the loan for.	Optional	48.0
`name`	String	Name of loan application property.	Optional	48.0
`propertyAddress`	Address Input[]	Physical address of the property to be financed.	Optional	48.0
`propertyUseType`	String	Borrower's stated use for the property.	Optional	48.0
`propertyValue`	Double	Estimated present market value of the application property.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
requestedLoanAmount	Double	Total loan amount the borrower is applying for.	Optional	48.0
unitsFinancedCount	Integer	Number of units being financed at this address.	Optional	48.0

Title Holder Input

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Root XML tag

```
<titleHolders>
```

JSON example

```
{
  "titleHolders": [
    {
      "extendedFields": [],
      "externalId": "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
      "isCurrentTitleHolder": true,
      "name": "T1",
      "titleHolderName": "Times"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
extendedFields	Extended Fields Input[]	Custom fields related to the title holder.	Optional	48.0
externalId	String	Identifier assigned to imported title holder data by external data source (if applicable).	Optional	48.0
id	String	ID of the title holder.	Optional	48.0
isCurrentTitleHolder	Boolean	Indicates whether person is a current title holder on property to be refinanced.	Optional	48.0
name	String	Name of the loan application title holder.	Optional	48.0
titleHolderName	String	Name of the person on the title for the property associated with the loan application.	Optional	48.0

Response Bodies

Here's a list of Financial Services Cloud Business API response bodies.

Mortgage Result
Represents the result of the POST or PATCH method.

Borrower Employment Output
Represents details about the borrower's or co-borrower's current and past employment.

Borrower Address Output
Represents Borrower addresses.

Mapper Result
Represents the Mapper result.

Mapper Result Representation
Represents the result representation of the POST method.

Extended Fields Output
Represents custom fields names and values.

Borrower Output
Represents details of the borrower or co-borrower for the loan application.

Borrower Income Output
Represents details about the borrower and co-borrower current monthly income.

Borrower Declaration Output
Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant.

Borrower Declaration Result
Result containing details about borrower's declaration.

Mortgage Response
Response for the POST or PATCH method.

Mortgage Information Output
Represents the output of the GET method.

Borrower employment Result
Borrower employment result of the POST or PATCH request.

Borrower Income Result
Borrower income result of the POST or PATCH request.

Asset Result
Asset result of the POST or PATCH request.

Borrower Address Result
Borrower address result of the POST or PATCH request.

Title Holder Result
Title holder result of the POST or PATCH request.

Property Result
Property result of the POST or PATCH request.

Liability Result
Liability result of the POST or PATCH request.

Financial Result
Financial result of the POST or PATCH request.

Borrower Result
Borrower result of the POST or PATCH request.

Address Output
Represents address details.

Property Output
Represents details of the property the loan application finances.

Liability Output
Details about the borrower and co-borrower current liabilities.

Asset Output
Represents details about the borrower's and co-borrower's current personal and real property.

Title Holder Output
Represents details of borrowers who are applying to hold title to the property the loan application finances.

Financial Output
Output details for the financial transaction.

Mortgage Information Response
Response for the GET method.

Mortgage Result

Represents the result of the POST or PATCH method.

Property Name	Type	Description	Filter Group and Version	Available Version
`assets`	Asset Result[]	Represents details about the borrower's and co-borrower's current personal and real property.	Big, 48.0	48.0
`borrowers`	Borrower Result[]	Represents details about the borrowers and co-borrowers.	Big, 48.0	48.0
`externalId`	String	Identifier assigned to imported title holder data by external data sourceif applicable).	Small, 48.0	48.0
`financials`	Financial Result[]	Represents transaction details for a loan application.	Big, 48.0	48.0
`id`	String	ID of the loan application.	Small, 48.0	48.0
`liabilities`	Liability Result[]	Represents details about the borrower and co-borrower current liabilities.	Big, 48.0	48.0
`properties`	Property Result[]	Represents details of the property the loan application finances.	Big, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
titleHolders	Title Holder Result[]	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Big, 48.0	48.0

Borrower Employment Output

Represents details about the borrower's or co-borrower's current and past employment.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
currentJobAdditionalMthCount	Integer	Additional number of months employed at this job (less than 12).	Small, 48.0	48.0
currentJobYearCount	Integer	Number of full years employed at this job.	Small, 48.0	48.0
employerAddress	Address Output[]	Address of borrower's employer or business.	Small, 48.0	48.0
employerName	String	Name of borrower's employer or business.	Small, 48.0	48.0
employerPhone	String	Employer's phone number.	Small, 48.0	48.0
endDate	String	Borrower's last date of employment at this job.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the borrower's employment.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported employer data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower's employment.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the employment record is deleted.	Small, 48.0	48.0
isLessThanQuarterShare	Boolean	Indicates whether borrower owns less than 25% of this business (if applicable).	Small, 48.0	48.0
isRelTransactionParty	Boolean	Indicates whether borrower is employed by a family member,	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version	
		property seller, real estate agent, or other person party to the loan application transaction.			
isSelfEmployed	Boolean	Indicates whether borrower is self-employed or owns the business.	Small, 48.0	48.0	
jobTitle	String	Borrower's job title or employer's business or industry type.	Small, 48.0	48.0	
lastModifiedBy	String	ID of the user who last modified this record.	Small, 48.0	48.0	
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0	
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0	
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0	
loanApplicantId	String	ID of the borrower record.	Small, 48.0	48.0	
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0	
monthlyBaseIncomeAmount	Double	Borrower's monthly bonus from this job.	Small, 48.0	48.0	
monthlyBonusAmount	Double	Borrower's monthly bonus from this job.	Small, 48.0	48.0	
monthlyCommissionAmount	Double	Borrower's monthly commission from this job.	Small, 48.0	48.0	
monthlyIncome	Double	Borrower's monthly income or loss from this business.	Small, 48.0	48.0	
monthlyMilitaryEntitlementAmt	Double	Borrower's monthly military entitlement from this job.	Small, 48.0	48.0	
monthlyOtherIncomeAmount	Double	Borrower's other monthly income from this job.	Small, 48.0	48.0	
monthlyOvertimeAmount	Double	Borrower's monthly overtime income from this job.	Small, 48.0	48.0	
monthlyTotalIncomeAmount	Double	Borrower's monthly total income from this job.	Total Monthly Income	Small, 48.0	48.0
name	String	Name of the loan applicant employment.	Small, 48.0	48.0	
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0	

Property Name	Type	Description	Filter Group and Version	Available Version
`startDate`	String	Name of the loan applicant employment.	Small, 48.0	48.0
`systemModstamp`	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Address Output

Represents Borrower addresses.

Property Name	Type	Description	Filter Group and Version	Available Version
`addressOwnership`	String	Identifies borrower's status at residence.	Small, 48.0	48.0
`createdById`	String	ID of the user who created this record.	Small, 48.0	48.0
`createdDate`	String	Date and time when this record was created.	Small, 48.0	48.0
`extendedFields`	Extended Fields Output[]	Custom fields related to the borrower's address.	Big, 48.0	48.0
`externalId`	String	Identifier assigned to imported borrower's address data by external data source. (if applicable)	Small, 48.0	48.0
`id`	String	ID of the borrower's address	Small, 48.0	48.0
`isDeleted`	Boolean	Indicates whether the borrower record is deleted.	Small, 48.0	48.0
`lastModifiedById`	String	ID of the user who last modified this record.	Small, 48.0	48.0
`lastModifiedDate`	String	Date and time when a user last modified this record.	Small, 48.0	48.0
`lastReferencedDate`	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
`lastViewedDate`	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
`loanApplicantId`	String	ID of the borrower record.	Small, 48.0	48.0
`loanApplicationId`	String	ID of the loan application record.	Small, 48.0	48.0
`monthlyRentPayment`	Double	Borrower's monthly rent payment (if applicable).	Small, 48.0	48.0
`name`	String	Name of the borrower's address.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
residenceAdditionalMthCount	Integer	Additional months borrower lived at this residence.	Small, 48.0	48.0
residenceAddress	Address Output[]	Residence's physical address.	Small, 48.0	48.0
residenceYearCount	Integer	Years borrower lived at this residence.	Small, 48.0	48.0
residencyType	String	Identifies borrower's current residency status.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Mapper Result

Represents the Mapper result.

```
{
  "assetsAndLiabilities": [
    "a03B000000735LwIAI",
    "a03B000000735LxIAI",
    "a03B000000735LyIAI"
  ],
  "customerProperties": [
    "0b8B0000000GnjdIAC"
  ],
  "errors": [],
  "financialAccounts": [
    "a0EB000000227WtMAI",
    "a0EB000000227WuMAI",
    "a0EB000000227WvMAI"
  ],
  "personAccounts": [
    "001B000001K8Zx5IAF"
  ],
  "status": "SUCCESS"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
assetsAndLiabilities	String[]	List of IDs created for AssetsAndLiabilities records.	Big, 49.0	49.0
customerProperties	String[]	List of IDs created for CustomerProperty records.	Big, 49.0	49.0
errors	String[]	List of errors that occurred during the creation process.	Big, 49.0	49.0

Property Name	Type	Description	Filter Group and Version	Available Version
financialAccounts	String[]	List of IDs created for FinancialAccount records.	Big, 49.0	49.0
personAccounts	String[]	List of IDs created for PersonAccount records.	Big, 49.0	49.0
status	String	Whether the creation process succeeded, partially succeeded, or failed.	Small, 49.0	49.0

Mapper Result Representation

Represents the result representation of the POST method.

JSON example

```
{
  "result": {
    "assetsAndLiabilities": [
      "a03B000000735LwIAI",
      "a03B000000735LxIAI",
      "a03B000000735LyIAI"
    ],
    "customerProperties": [
      "0b8B0000000GnjdIAC"
    ],
    "errors": [],
    "financialAccounts": [
      "a0EB000000227WtMAI",
      "a0EB000000227WuMAI",
      "a0EB000000227WvMAI"
    ],
    "personAccounts": [
      "001B000001K8Zx5IAF"
    ],
    "status": "SUCCESS"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Success or failure message.	Small, 49.0	49.0
result	Mapper Result on page 460	Mapper result.	Small, 49.0	49.0

Extended Fields Output

Represents custom fields names and values.

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	Name of the custom field.	Small, 48.0	48.0
value	String	Value of the custom field.	Small, 48.0	48.0

Borrower Output

Represents details of the borrower or co-borrower for the loan application.

Property Name	Type	Description	Filter Group and Version	Available Version
addresses	Borrower Address Output[]	Borrower's addresses.	Big, 48.0	48.0
asianRaceSubType	String	Borrower's Asian race.	Small, 48.0	48.0
borrowerType	String	Applicant's borrower type.	Small, 48.0	48.0
citizenshipStatus	String	Borrower's citizenship status.	Small, 48.0	48.0
contactId	String	Contact associated with this borrower.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
declarations	Borrower Declaration Output[]	Borrower's declarations.	Big, 48.0	48.0
dependentCount	Integer	Borrower's number of dependents.	Small, 48.0	48.0
dependentsAge	String	Ages of borrower's dependents in a comma-separated list.	Small, 48.0	48.0
employments	Borrower Employment Output[]	Borrower's employments.	Big, 48.0	48.0
ethnicitySubType	String	Borrower's ethnicity.	Small, 48.0	48.0
ethnicityType	String	Borrower's ethnicity origin.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields.	Big, 48.0	48.0
externalId	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
genderType	String	Borrower's gender.	Small, 48.0	48.0
hasMilitaryService	Boolean	Indicates whether the borrower is serving in the United States Armed Forces or the	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
		borrower or the borrower's deceased spouse served in the past.		
id	String	ID of the Borrower.	Small, 48.0	48.0
incomes	Borrower Income Output[]	Borrower's incomes.	Big, 48.0	48.0
isActiveMilitary	Boolean	Indicates whether borrower is currently on active duty with the United States Armed Forces.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the title holder record is deleted.	Small, 48.0	48.0
isJointCredit	Boolean	Indicates whether borrower is applying for joint credit.	Small, 48.0	48.0
isSurvivingMilitarySpouse	Boolean	Indicates whether borrower is a surviving spouse of a veteran.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
maritalStatus	String	Borrower's marital status.	Small, 48.0	48.0
militaryTourExpirationMonth	Integer	Month that borrower's tour of service expires.	Small, 48.0	48.0
militaryTourExpirationYear	Integer	Year that borrower's tour of service expires.	Small, 48.0	48.0
name	String	Name of the borrower.	Small, 48.0	48.0
otherAsianRaceSubType	String	Borrower's Asian race if other is specified.	Small, 48.0	48.0
otherEthnicitySubType	String	Borrower's ethnicity if other is specified.	Small, 48.0	48.0
otherPacIslandSubType	String	Borrower's native Hawaiian or Pacific Islander race if other is specified.	Small, 48.0	48.0
ownerId	String	ID of the user who owns the record.	Small, 48.0	48.0
pacificIslanderSubType	String	Borrower's native Hawaiian or Pacific Islander race.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
preferredLanguage	String	Borrower's preferred communication language.	Small, 48.0	48.0
raceType	String	Borrower's race.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
tribeName	String	Name of borrower's enrolled or principal tribe.	Small, 48.0	48.0
wasActiveMilitary	Boolean	Indicates whether borrower is currently retired, discharged, or separated from active military duty.	Small, 48.0	48.0
wasNonActivatedService	Boolean	Indicates whether borrower's only military service was as a non-activated Reserve soldier or as a non-activated member of the National Guard.	Small, 48.0	48.0

Borrower Income Output

Represents details about the borrower and co-borrower current monthly income.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the income.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported income data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the income.	Small, 48.0	48.0
incomeSourceType	String	Source of borrower's monthly non-employment income.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the income record is deleted.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicantId	String	ID of the loan applicant record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
monthlyIncomeAmount	Double	Amount of borrower's monthly non-employment income from this source.	Small, 48.0	48.0
name	String	Name of the other monthly income.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Declaration Output

Represents financial issues like foreclosure, lawsuits, or defaults of the applicant or co-applicant.

Property Name	Type	Description	Filter Group and Version	Available Version
bankruptcyType	String	Bankruptcy type or types (if applicable).	Small, 48.0	48.0
borrowedAmount	Double	Amount of money borrowed for loan application transaction.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the financial transaction.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported declaration data by external data source (if applicable).	Small, 48.0	48.0
hasBorrowedMoney	Boolean	Indicates whether borrower is borrowing money for loan application transaction.	Small, 48.0	48.0
hasCoSignerUndisclosedDebt	Boolean	Indicates whether borrower is co-signer or guarantor on debt or loan that's not disclosed on loan application.	Small, 48.0	48.0
hasDeclaredBankruptcy	Boolean	Indicates whether borrower declared bankruptcy within the past seven years.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
hasDeedSurrender	Boolean	Indicates whether borrower conveyed title to a property in lieu of foreclosure in past seven years.	Small, 48.0	48.0
hasOutstandingJudgment	Boolean	Indicates whether there are one or more outstanding judgments against the borrower.	Small, 48.0	48.0
hasOwnershipInterest	Boolean	Indicates whether borrower had ownership interest in a property in the last ree years.	Small, 48.0	48.0
hasPastShortSale	Boolean	Indicates whether borrower sold a property to a third party where lender agreed to accept amount less than total outstanding mortgage balance due within past ven years.	Small, 48.0	48.0
hasPropertyForeclosed	Boolean	Indicates whether borrower had property foreclosed upon in last ven years.	Small, 48.0	48.0
hasUndisclosedAddCreditApp	Boolean	Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.	Small, 48.0	48.0
hasUndisclosedOtherPropLoan	Boolean	Indicates whether, on or before closing, borrower applied for an undisclosed mortgage loan on a property other than the application property.	Small, 48.0	48.0
id	String	ID of the borrower declaration.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the declaration record is deleted.	Small, 48.0	48.0
isPartyToLawsuit	Boolean	Indicates whether borrower is party to lawsuit with potential personal financial liability.	Small, 48.0	48.0
isPresentlyDelinquent	Boolean	Indicates whether borrower is currently delinquent or in default on any federal debt or other loan, mortgage, financial obligation, bond, or loan guarantee.	Small, 48.0	48.0
isPrimaryResidence	Boolean	Indicates whether property is to be borrower's primary residence.	Small, 48.0	48.0
isRelatedToSeller	Boolean	Indicates whether borrower has family or business relationship with seller of property (for purchase transaction).	Small, 48.0	48.0
isSubjectToPriorityLien	Boolean	Indicates whether application property is to have a priority clean energy lien like	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
		Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.		
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicantId	String	ID of the loan applicant record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the declaration.	Small, 48.0	48.0
ownerId	String	ID of the user who owns the record.	Small, 48.0	48.0
priorPropertyTitleType	String	Identifies how borrower held title in the ownership interest property.	Small, 48.0	48.0
priorPropertyUsageType	String	Identifies type of property borrower held ownership interest in.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Borrower Declaration Result

Result containing details about borrower's declaration.

Property Name	Type	Description	Filter Group and Version	Available Version
externalId	String	Identifier assigned to imported borrower data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the borrower.	Small, 48.0	48.0

Mortgage Response

Response for the POST or PATCH method.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Error message, if any.	Small, 48.0	48.0
result	Mortgage Result[]	Representation of mortgage result.	Small, 48.0	48.0

Mortgage Information Output

Represents the output of the GET method.

Property Name	Type	Description	Filter Group and Version	Available Version
accountId	String	Account associated with the application.	Small, 48.0	48.0
amortizationTerm	Double	Duration of the amortization in months.	Small, 48.0	48.0
amortizationType	String	Amortization type for loan.	Small, 48.0	48.0
assets	Asset Output[]	Represents details about the borrower's and co-borrower's current personal and real property.	Big, 48.0	48.0
balloonTermMonths	Double	Number of months during which the cumulative loan must be repaid.	Small, 48.0	48.0
borrowers	Borrower Output[]	List of borrowers for the loan application.	Big, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
estateHoldType	String	Lender's lien is on both land and structure (fee simple) or just structure (leasehold).	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Represents custom fields related to a loan application.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported data by external data source (if applicable).	Small, 48.0	48.0
financials	Financial Output[]	Represents transaction details for a loan application.	Big, 48.0	48.0
hasOtherLoanFeature	Boolean	Indicates whether loan has other amortization feature.	Small, 48.0	48.0
hasPrepaymentPenalty	Boolean	Indicates whether penalty is incurred if borrower pays off loan balance before the loan term expires.	Small, 48.0	48.0
id	String	ID of the mortgage record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
improvementCost	Double	Construction costs for a construction loan or home improvement costs for a renovation loan.	Small, 48.0	48.0
initialBuydownRate	Double	Initial lesser interest rate for the loan.	Small, 48.0	48.0
interestOnlyMonthCount	Double	Number of months that loan payments are interest only.	Small, 48.0	48.0
interestRate	Double	Interest rate for loan.	Small, 48.0	48.0
isBalloon	Boolean	Indicates whether borrower is applying for a balloon payment mortgage.	Small, 48.0	48.0
isBorrowerCommunityPropState	Boolean	Indicates whether the borrower lives in community property state.	Small, 48.0	48.0
isConstructionToPermanent	Boolean	Indicates whether at least one borrower lives in a community property state.	Small, 48.0	48.0
isContractForDeed	Boolean	Indicates whether loan proceeds is to pay off balance due on a contract for deed or land contract.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the record is deleted.	Small, 48.0	48.0
isEnergyRelatedImprovement	Boolean	Indicates whether loan is to finance energy-related improvements.	Small, 48.0	48.0
isInterestOnly	Boolean	Indicates whether borrower is applying for an interest-only mortgage.	Small, 48.0	48.0
isNegativeAmortization	Boolean	Indicates whether loan allows for negative amortization where shortfalls in interest payments are added to the outstanding loan balance.	Small, 48.0	48.0
isPropInCommunityPropState	Boolean	Indicates whether property is located in a community property state.	Small, 48.0	48.0
isRenovation	Boolean	Indicates whether loan proceeds to finance cost of renovations to the property, and renovation value is included in the property's appraised value.	Small, 48.0	48.0
isSingleClosing	Boolean	Indicates whether construction and permanent loans have a single combined closing. Once construction is complete, loan converts to a traditional mortgage.	Small, 48.0	48.0
isSubjectToPriorityLien	Boolean	Indicates whether property is currently subject to an energy-related lien that could take priority over the first mortgage lien.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
isTempIntRateBuydown	Boolean	Indicates whether borrower is applying for loan with an initially reduced interest payment in exchange for an up-front cash deposit.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
leaseholdExpirationDate	String	Date when leasehold expires if land is leased.	Small, 48.0	48.0
liabilities	Liability Output[]	Represents details about the borrower and co-borrower current liabilities.	Big, 48.0	48.0
loanPurpose	String	Purpose of the loan.	Small, 48.0	48.0
lotAcquiredDate	String	Month and year property or land was purchased.	Small, 48.0	48.0
lotOriginalCost	Double	Original property cost (refinance) or original land cost (construction).	Small, 48.0	48.0
monthsBeforeFirstAdj	Double	Initial period prior to first adjustment in months.	Small, 48.0	48.0
monthsBetweenAdjustments	Double	Number of months before the first rate adjustment for an adjustable rate loan.	Small, 48.0	48.0
mortgageLienType	String	Type of mortgage lien associated with this loan application.	Small, 48.0	48.0
mortgageProgramType	String	Type of mortgage program applied for.	Small, 48.0	48.0
name	String	Name of the residential loan application.	Small, 48.0	48.0
nativeLandTenure	String	Property is located on an area reserved by or for an Indian land, village, or tribe to live on and use.	Small, 48.0	48.0
opportunityId	String	Opportunity associated with the application.	Small, 48.0	48.0
otherAmortizationType	String	Description of other amortization type for government loans.	Small, 48.0	48.0
otherLoanFeature	String	Description of other loan amortization feature.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
otherLoanPurpose	String	What the borrower will use the loan for if other was specified.	Small, 48.0	48.0
otherMortgageProgramType	String	Description of the other mortgage type.	Small, 48.0	48.0
otherRefinanceProgType	String	Refinance program name if other was specified.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0
prepayPenaltyTermMonth	Double	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Small, 48.0	48.0
projectType	String	Specifies the type of project that the property belongs to.	Small, 48.0	48.0
properties	Property Output[]	Represents details of the property the loan application finances.	Big, 48.0	48.0
refinanceProgramType	String	The applicable refinance program type based on the investor, guarantor, or lender guidelines.	Small, 48.0	48.0
refinanceType	String	Refinance loan type.	Small, 48.0	48.0
status	String	Indicates the current status of the loan application.	Small, 48.0	48.0
systemModstamp	String	Represents details of borrowers who are applying to hold title to the property the loan application finances.	Small, 48.0	48.0
titleHolders	Title Holder Output[]	Way the borrower or borrowers take title for the loan.	Big, 48.0	48.0
titleType	String	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Small, 48.0	48.0
totalFnLiabilityMonthlyAmt	Double	Total monthly amount of borrowers' outstanding financial liabilities payments excluding real estate.	Small, 48.0	48.0
totalFinancialAssetAmount	Double	Total amount of borrowers' financial account assets excluding real estate.	Small, 48.0	48.0
totalOtherAssetAmount	Double	Total amount of borrowers' other assets excluding real estate.	Small, 48.0	48.0
totalOtherLiabilityMonthlyAmt	Double	Total monthly amount of borrowers' other monthly liability and expense payments excluding real estate.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
`trustTitleType`	String	Title to be held in a living trust or a land trust.	Small, 48.0	48.0

Borrower employment Result

Borrower employment result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Borrower Income Result

Borrower income result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Asset Result

Asset result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Borrower Address Result

Borrower address result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Title Holder Result

Title holder result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Property Result

Property result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Liability Result

Liability result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Financial Result

Financial result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the borrower.	Small, 48.0	48.0

Borrower Result

Borrower result of the POST or PATCH request.

Property Name	Type	Description	Filter Group and Version	Available Version
`addresses`	Borrower Address Result[]	Borrower's addresses.	Big, 48.0	48.0
`declarations`	Borrower Declaration Result[]	Borrower's declarations.	Big, 48.0	48.0
`employments`	Borrower employment Result[]	Borrower's employments.	Big, 48.0	48.0
`externalId`	String	ID that uniquely identifies imported data in an external data source (if applicable).	Small, 48.0	48.0
`id`	String	ID of the orrower.	Small, 48.0	48.0
`incomes`	Borrower Income Result[]	Borrower's incomes.	Big, 48.0	48.0

Address Output

Represents address details.

Property Name	Type	Description	Filter Group and Version	Available Version
`city`	String	The address city.	Small, 48.0	48.0
`country`	String	The address country.	Small, 48.0	48.0
`postalCode`	String	The address postal code.	Small, 48.0	48.0
`state`	String	The address state.	Small, 48.0	48.0
`street`	String	The address street.	Small, 48.0	48.0

Property Output

Represents details of the property the loan application finances.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
esMonthlyRentalIncome	Double	Estimated gross monthly rental income per unit if application property is a two to four unit primary residence or investment property.	Small, 48.0	48.0
esNetMonthlyRentalIncome	Double	Estimated net monthly rental income per unit if application property is a two-to-four unit primary residence or investment property.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the property.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported property data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the property.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the property record is deleted.	Small, 48.0	48.0
isManufacturedHome	Boolean	Indicates whether application property is a manufactured home.	Small, 48.0	48.0
isMixedUseProperty	Boolean	Indicates whether application property includes commercial space set aside for business use.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
loanPurposeType	String	What the borrower will use the loan for.	Small, 48.0	48.0
name	String	Name of loan application property.	Small, 48.0	48.0
propertyAddress	Address Output	Physical address of the property to be financed.	Small, 48.0	48.0
propertyUseType	String	Borrower's stated use for the property.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
propertyValue	Double	Estimated present market value of the application property.	Small, 48.0	48.0
requestedLoanAmount	Double	Total loan amount the borrower is applying for.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
unitsFinancedCount	Integer	Number of units being financed at this address.	Small, 48.0	48.0

Liability Output

Details about the borrower and co-borrower current liabilities.

Property Name	Type	Description	Filter Group and Version	Available Version
accountNumber	String	Borrower's account number with lender or creditor.	Small, 48.0	48.0
accountType	String	Personal debt borrower owes like credit card balances, other debts, and leases.	Small, 48.0	48.0
borrowersExternalIds	String[]	Identifier assigned to imported borrowers data by external data source (if applicable).	Big, 48.0	48.0
borrowersIds	String[]	IDs of the borrowers.	Big, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
creditLimitAmount	Double	Credit limit of real estate loan or line of credit.	Small, 48.0	48.0
creditorName	String	Lender or creditor owed the debt.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the asset.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported liability data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the liability.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the liability record is deleted.	Small, 48.0	48.0
isJointLiability	Boolean	Indicates whether borrower holds liability jointly.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
liabilityClass	String	Include the liability's monthly payment in this liability class monthly payment total.	Small, 48.0	48.0
loanApplicationAssetId	String	ID of the loan application asset record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
loanType	String	Existing real estate loan type.	Small, 48.0	48.0
monthlyPaymentAmount	Double	Borrower's monthly payment required to keep debt account current.	Small, 48.0	48.0
name	String	Name of the liability.	Small, 48.0	48.0
otherLiabilityType	String	Identifies type of other borrower expense or liability.	Small, 48.0	48.0
ownerId	String	ID of the user who owns the record.	Small, 48.0	48.0
shouldBePaidInFull	Boolean	Indicates whether borrower to pay off debt on or before closing.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
unpaidBalanceAmount	Double	Unpaid liability balance when borrower completed loan application.	Small, 48.0	48.0

Asset Output

Represents details about the borrower's and co-borrower's current personal and real property.

Property Name	Type	Description	Filter Group and Version	Available Version
accountNumber	String	Account number associated with financial institution holding asset.	Small, 48.0	48.0
accountType	String	Identifies asset account type.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
assetClass	String	Identifies which asset class total to include the asset's value in.	Small, 48.0	48.0
assetType	String	Identifies type of other asset.	Small, 48.0	48.0
borrowersExternalIds	String[]	External IDs of borrower and co-borrowers.	Big, 48.0	48.0
borrowersIds	String[]	IDs of borrower and co-borrowers.	Big, 48.0	48.0
cashOrMarketValue	Double	Asset's cash or current market value.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
dispositionType	String	Real estate asset's planned future use.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the asset.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported asset data by external data source (if applicable).	Small, 48.0	48.0
financialInstitutionName	String	Name of financial institution where financial account is held.	Small, 48.0	48.0
grossMonthlyRentalIncome	Double	Borrower's monthly rent income collected on real estate asset.	Small, 48.0	48.0
id	String	ID of the asset.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the asset record is deleted.	Small, 48.0	48.0
isJointAsset	Boolean	Indicates asset is held jointly.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the loan application asset.	Small, 48.0	48.0
netMonthlyRentalIncome	Double	Borrower's net monthly income on real estate asset.	Small, 48.0	48.0
ownerId	String	ID of the user who owns this record.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
presentMarketValue	Double	Cash value of real estate asset if sold today.	Small, 48.0	48.0
realEstateAddress	Address Output[]	Real estate asset's address.	Small, 48.0	48.0
realEstateMonthlyExpense	Double	Borrower's monthly real estate asset expenses including insurance, maintenance, taxes, and miscellaneous costs.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0

Title Holder Output

Represents details of borrowers who are applying to hold title to the property the loan application finances.

Property Name	Type	Description	Filter Group and Version	Available Version
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the title holder.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported title holder data by external data source (if applicable).	Small, 48.0	48.0
id	String	ID of the title holder.	Small, 48.0	48.0
isCurrentTitleHolder	Boolean	Indicates whether person is a current title holder on property to be refinanced.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the title holder record is deleted.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the loan application title holder.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
titleHolderName	String	Name of the person on the title for the property associated with the loan application.	Small, 48.0	48.0

Financial Output

Output details for the financial transaction.

Property Name	Type	Description	Filter Group and Version	Available Version
borrowerClosingCostAmt	Double	Total closing costs due from borrower, including prepaid and initial escrow payments.	Small, 48.0	48.0
cashFromOrToBorrowerAmt	Double	Cash the borrower pays or receives at closing, not including reserves or other funds that may still require lender verification.	Small, 48.0	48.0
counselingAgencyName	String	Counseling provider's name if agency isn't HUD approved or if Housing Counseling Agency ID is unknown.	Small, 48.0	48.0
counselingAgencyProviderName	String	Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.	Small, 48.0	48.0
counselingCompleteBorrName	String	Name of borrower or borrowers who completed housing counseling.	Small, 48.0	48.0
counselingCompletionDate	String	Date borrower completed housing counseling.	Small, 48.0	48.0
createdById	String	ID of the user who created this record.	Small, 48.0	48.0
createdDate	String	Date and time when this record was created.	Small, 48.0	48.0
creditFromSeller	Double	Total amount of closing costs due from seller.	Small, 48.0	48.0
discountPointCostAmount	Double	Total cost of discount points purchased by the borrower due at closing.	Small, 48.0	48.0
estFirstMortgagePayment	Double	Proposed monthly first mortgage payment for loan application property, including principal and interest.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
estHomeownerInsurancePayment	Double	Proposed monthly payment for homeowners insurance on application property.	Small, 48.0	48.0
estMortgageInsurancePayment	Double	Proposed monthly mortgage insurance payment on application property.	Small, 48.0	48.0
estOtherDuesPayment	Double	Proposed total monthly payment on application property for payments like homeowners association, co-op, condo, or planned unit development dues.	Small, 48.0	48.0
estOtherPayment	Double	Proposed total monthly payment for other housing expenses on application property.	Small, 48.0	48.0
estPropertyTaxesPayment	Double	Proposed monthly payment for real estate taxes on application property.	Small, 48.0	48.0
estSubordinateLienPayment	Double	Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.	Small, 48.0	48.0
estSuppPropInsurancePayment	Double	Proposed monthly payment for supplemental property insurance like flood, earthquake, or umbrella policies on application property.	Small, 48.0	48.0
extendedFields	Extended Fields Output[]	Custom fields related to the transaction.	Big, 48.0	48.0
externalId	String	Identifier assigned to imported financial data by external data source (if applicable).	Small, 48.0	48.0
financeMortgageInsuranceAmt	Double	Total amount of financed mortgage insurance or financed mortgage insurance equivalent.	Small, 48.0	48.0
hasCompletedCounseling	Boolean	Indicates whether one or more borrowers completed housing counseling within the last 12 months.	Small, 48.0	48.0
hasHomeownerEducation	Boolean	Indicates whether one or more borrowers completed homeownership education within the last 12 months.	Small, 48.0	48.0
homeEdCompletedBorrowerName	String	Name of borrower or borrowers who completed homeownership education.	Small, 48.0	48.0
homeownerEdCompleteDate	String	Date borrower completed homeownership education.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
homeownerEdFormat	String	Indicates the format of homeownership education attended by borrower.	Small, 48.0	48.0
housingCounselingFormat	String	Indicates the format of the housing counseling completed by borrower.	Small, 48.0	48.0
hudApproveAgencyId	String	Home counseling provider's Housing Counseling Agency ID if agency is HUD-approved.	Small, 48.0	48.0
hudApprovedProviderId	String	Homeownership education provider's Housing Counseling Agency ID if agency is HUD-approved.	Small, 48.0	48.0
id	String	ID of the loan application financial.	Small, 48.0	48.0
isDeleted	Boolean	Indicates whether the financial record is deleted.	Small, 48.0	48.0
landAcquiredSeparatelyCost	Double	Price of land if purchased separately from the building or structure.	Small, 48.0	48.0
lastModifiedById	String	ID of the user who last modified this record.	Small, 48.0	48.0
lastModifiedDate	String	Date and time when a user last modified this record.	Small, 48.0	48.0
lastReferencedDate	String	Date and time when a user last referenced this record.	Small, 48.0	48.0
lastViewedDate	String	Date and time when a user last viewed this record.	Small, 48.0	48.0
loanAmount	Double	Total loan amount.	Small, 48.0	48.0
loanAmtExclFinMortgageInsurance	Double	Loan amount excluding financed mortgage insurance or financed mortgage insurance equivalent.	Small, 48.0	48.0
loanApplicationId	String	ID of the loan application record.	Small, 48.0	48.0
name	String	Name of the loan application financial.	Small, 48.0	48.0
otherCredit	Double	Total amount of all purchase credits like borrower credits, credits from third parties, and non-cash seller credits.	Small, 48.0	48.0
otherNewMortgageLoanAmt	Double	Total amount of other new borrower mortgages, both first lien and subordinate lien, on the application property.	Small, 48.0	48.0
outstandingLoanAmount	Double	Total amount of all mortgage loans on application property to be paid off by refinance loan.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
purchasePriceAmount	Double	Purchase price for the property.	Small, 48.0	48.0
remodelAndRepairsAmount	Double	Cost of any alterations, improvements, and repairs on the property.	Small, 48.0	48.0
systemModstamp	String	Date and time when a user or automated process (such as a trigger) last modified this record.	Small, 48.0	48.0
totalCashDueFromBorrower	Double	Total cash due from borrower at closing.	Small, 48.0	48.0
totalCredit	Double	Total borrower credits.	Small, 48.0	48.0
totalDebtPaidOffAmount	Double	Total amount of all non-application property liabilities borrower indicated would be paid off on or before closing.	Small, 48.0	48.0
totalEstPaymentAmt	Double	Proposed total monthly payment for application property.	Small, 48.0	48.0
totalMortgageLoanAndCreditAmt	Double	Total mortgage loans plus total credits.	Small, 48.0	48.0
totalMortgageLoansAmount	Double	Total amount of loan.	Small, 48.0	48.0

Mortgage Information Response

Response for the GET method.

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	Error message, if any.	Small, 48.0	48.0
result	Mortgage Information Output[]	Data of the mortgage result.	Small, 48.0	48.0

AccountRelationhipShareRule

Represents the rule that determines which object records are shared, how they are shared, the account relationship type that shares the records, and the level of access granted to the records. This type extends the MetadataWithContent metadata type and inherits its `content` and `fullName` fields.

AccountRelationhipShareRule

The FSC Insurance permission set in Financial Services Cloud exposes additional values for the accountToCriteriaField and entityType fields on the AccountRelationshipShareRule metadata type.

Field Name	Field Type	Description
`accountToCriteriaField`	string	Criteria that must be met for the data to be shared. This field shows these additional values for Insurance for Financial Services Cloud. • `BusinessMilestone.OwnerId` • `BusinessMilestone.PrimaryAccountId` • `Claim.AccountId` • `Claim.OwnerId` • `CustomerProperty.OwnerId` • `CustomerProperty.PrimaryOwnerId` • `InsurancePolicy.NameInsuredId` • `InsurancePolicy.OwnerId` • `PersonLifeEvent.OwnerId`
`entityType`	string	The type of data shared by this rule. This field shows these additional values for Insurance for Financial Services Cloud. • `BusinessMilestone` • `Claim` • `CustomerProperty` • `InsurancePolicy` • `PersonLifeEvent`

SEE ALSO:

Metadata API Developer Guide: AccountRelationshipShareRule

BatchCalcJobDefinition

Represents a Data Processing Engine definition.This type extends the Metadata metadata type and inherits its `fullName` field.

File Suffix and Directory Location

BatchCalcJobDefinition components have the suffix `.batchCalcJobDefinition` and are stored in the `batchCalcJobDefinitions` folder.

Version

BatchCalcJobDefinition components are available in API version 51.0 and later.

Special Access Rules

To use this metadata type, one of these licenses is required:

- Loyalty Management
- Financial Services Cloud
- Rebate Management

Fields

Field Name	Field Type	Description
`aggregates`	BatchCalcJob Aggregate[]	Collection of aggregate nodes in a data processing engine.
`appends`	BatchCalcJobUnion[]	Collection of append nodes in a data processing engine.
`datasources`	BatchCalcJob Datasource[]	Collection of data source nodes in a data processing engine.
`description`	string	Description of a data processing engine definition.
`filters`	BatchCalcJobFilter[]	Collection of filter nodes in a data processing engine.
`isTemplate`	boolean	Indicates whether this is a template data processing engine definition.
`joins`	BatchCalcJobSource Join[]	Collection of join nodes in a data processing engine.
`label`	string	The label of a data processing engine definition.
`parameters`	BatchCalcJobParameter[]	Collection of input variables in a data processing engine.
`processType`	BatchCalcProcessType (enumeration of type string)	The process type of a data processing engine. Valid values are: • `DataProcessingEngine` • `Rebates` • `FSCHierarchyRollUp`

Field Name	Field Type	Description
		• `Loyalty`
`status`	BatchJobDefinitionStatus (enumeration of type string)	Status of a data processing engine definition. Valid values are: • `Active` • `Inactive`
`transforms`	BatchCalcJobTransform[]	Collection of data transformation nodes in a data processing engine.
`writebacks`	BatchCalcJobWritebackObject[]	Collection of writeback objects in which the results of the data processing engine are written back.

BatchCalcJobAggregate

Represents a collection of fields relating to an aggregate node in a data processing engine.

Fields

Field Name	Field Type	Description
`description`	string	Description of an aggregate node.
`fields`	BatchCalcJobAggregateField[]	Required. Collection of aggregation fields.
`groupBy`	string[]	Required. Collections of fields used to group data in an aggregate node.
`label`	string	Required. Label of an aggregate node.
`name`	string	Required. Name of an aggregate node.
`sourceName`	string	Required. Name of the source node.

BatchCalcJobAggregateField

Represents a collection of fields relating to an aggregation field in an aggregate node of a data processing engine.

Fields

Field Name	Field Type	Description
`aggregateFunction`	BatchCalcJobAggregateFunction (enumeration of type string)	Required. Function used for aggregation. Valid values are: • `Unique`—A count of unique values. • `Sum`—The sum of all values. • `Max`—The largest value.

Field Name	Field Type	Description
		• `Min`—The smallest value. • `Avg`—The average value, calculated as the mean. • `Std`—The standard deviation. • `Stdp`—A standard deviation with population variance. • `Var`—The variance. • `VarP`—The variance with population. • `Count`—The total count of values.
`alias`	string	Required. Name that subsequent nodes within the data processing engine use to refer to the aggregate field.
`sourceFieldName`	string	Required. Source node field on which the aggregate is calculated.

BatchCalcJobDatasource

Represents a collection of fields relating to a data source node in a data processing engine.

Fields

Field Name	Field Type	Description
`description`	string	Description of a data source node.
`fields`	BatchCalcJob DatasourceField[]	Required. Collection of data source fields.
`label`	string	Required. Label of a data source node.
`name`	string	Required. Name of a data source node.
`sourceName`	string	Required. Name of a standard or custom object from which the data source node extracts data.
`type`	BatchCalcJobSource Type (enumeration of type string)	Required. Type of object for the source object field. Supported value is `StandardObject`.

BatchCalcJobDatasourceField

Represents a collection of fields relating to a source object field that are selected in the data source node of a data processing engine.

Fields

Field Name	Field Type	Description
`alias`	string	Name that subsequent nodes within the data processing engine use to refer to the data source field. Required when the field name is lookup.
`name`	string	Required. Name of the field. This can be either of the following: • Name of the source field selected in the associated data source object. • Name from a nested lookup object with three child levels.

BatchCalcJobFilter

Represents a collection of fields relating to a filter node in a data processing engine.

Fields

Field Name	Field Type	Description
`criteria`	BatchCalcJobFilterCriteria[]	Collection of filter criteria in a filter node. Note: The field is required when `isDynamicFilter` is set to `False`.
`description`	string	Description of the batch calculation job filter.
`filterCondition`	string	Logic that is specified to apply the filter conditions. Note: The field is required when `isDynamicFilter` is set to `False`.
`filterParameterName`	string	Name of the parameter of type filter.
`isDynamicFilter`	boolean	Indicates whether the filter criteria is dynamic. If value is set to `True`, filter criteria is passed in runtime with `filterParameterName`.
`label`	string	Required. Label of the filter node.
`name`	string	Required. Name of the filter node.
`sourceName`	string	Required. Name of the source node.

BatchCalcJobFilterCriteria

Represents a collection of fields relating to a filter condition in a filter node in a data processing engine.

Fields

Field Name	Field Type	Description
`inputVariable`	string	Name of the input variable used as a filter.
`operator`	BatchCalcJobFilterOperator (enumeration of type string)	Required. Operator that is specified in the filter condition. Valid values are: • `Equals` • `NotEquals` • `GreaterThan` • `GreaterThanOrEqual` • `LessThan` • `LessThanOrEqual` • `StartsWith` • `EndsWith` • `Contains` • `DoesNotContain` • `IsNull` • `IsNotNull`
`sequence`	integer	Required. Sequence number used to refer the criteria in a filter node.
`sourceFieldName`	string	Required. Name of the field from the source node to apply the filter.
`value`	string	Value used to filter data from the source node.

BatchCalcJobParameter

Represents a collection of fields relating to an input variable in a data processing engine.

Fields

Field Name	Field Type	Description
`dataType`	BatchCalcJobParameterDataType (enumeration of type string)	Required. Data type of the parameter. Valid values are: • `Text` • `Numeric` • `Date` • `DateTime` • `Filter`
`defaultValue`	string	Default value of the parameter.
`description`	string	Description of the batch calculation job parameter.

Field Name	Field Type	Description
`isMultiValue`	boolean	Indicates whether the parameter has different values (`True`) or not (`False`). This field is supported only for the `Text` data type.
`label`	string	Required. Label of the batch calculation job parameter.
`name`	string	Required. Name of the batch calculation job parameter.

BatchCalcJobSourceJoin

Represents a collection of fields relating to a join node in a data processing engine.

Fields

Field Name	Field Type	Description
`description`	string	Description of the join node.
`fields`	BatchCalcJobJoinResultField[]	Collection of fields in a join node.
`joinKeys`	BatchCalcJobJoinKey[]	Collection of mapping of fields from the primary source node and the second source node in a join node.
`label`	string	Required. Label of the join node.
`name`	string	Required. Name of the join node.
`primarySourceName`	string	Required. Name associated with the node as the primary source node.
`secondarySourceName`	string	Required. Name associated with the node as the secondary source node.
`type`	BatchCalcJobSourceJoinType (enumeration of type string)	Required. Type of join specified between the primary source node and secondary source node. Valid values are: • `LeftOuter` • `RightOuter` • `Inner` • `Outer` • `Lookup`

BatchCalcJobJoinKey

Represents a collection of fields relating to a mapping of fields from the first source node and second source node in a join node of a data processing engine.

Fields

Field Name	Field Type	Description
primarySourceFieldName	string	Required. Mapped field name of the primary source node.
secondarySourceFieldName	string	Required. Mapped field name of the secondary source node.

BatchCalcJobJoinResultField

Represents a collection of fields relating to a set of resultant fields in a join node of a data processing engine.

Fields

Field Name	Field Type	Description
alias	string	Required. Name that subsequent nodes within the data processing engine definition use to refer to the resultant field.
sourceFieldName	string	Required. Name of field from the primary or secondary data source.
sourceName	string	Required. Source node of the primary or secondary data source.

BatchCalcJobTransform

Represents a collection of fields relating to a data transformation in a data processing engine.

Fields

Field Name	Field Type	Description
description	string	The description of the batch calculation job transform.
droppedFields	BatchCalcJobTransformDroppedField[]	The collection of dropped fields in a data transformation. Available when the transformation type is `Slice`.
expressionFields	BatchCalcJobTransformAddedField[]	The collection of formula fields in a data transformation. Available when the transformation type is `Expression`.
label	string	Required. The label of the batch calculation job transform.
name	string	Required. The name of the batch calculation job transform.
sourceName	string	Required. Name of the source node.
transformType	BatchCalcJobTransformType (enumeration of type string)	Required. The type of transformation. Valid values are: • `Expression` • `Slice`

BatchCalcJobTransformDroppedField

Represents a collection of fields relating to a dropped field in a data transformation of a data processing engine.

Fields

Field Name	Field Type	Description
`sourceFieldName`	string	Required. Name of the field that is dropped.

BatchCalcJobTransformAddedField

Represents a collection of fields relating to a formula in a data transformation of a data processing engine.

Fields

Field Name	Field Type	Description
`alias`	string	Required. Name that subsequent nodes within the data processing engine use to the transform node.
`dataType`	BatchCalcJobDataType (enumeration of type string)	Required. Data type of the formula. Valid values are: • `Text` • `Numeric` • `Date` • `DateTime`
`decimalPlaces`	integer	Number of digits to the right of a decimal point in the value. Required for the `Numeric` data type.
`expression`	string	Required. Formula defined by the user.
`length`	integer	Total length of the value including the decimal places. Required for data types: `Text` and `Numeric`.

BatchCalcJobUnion

Represents a collection of fields relating to the union of data from two nodes in a data processing engine.

Fields

Field Name	Field Type	Description
`description`	string	Description of the batch calculation job union.

Field Name	Field Type	Description
isDisjointedSchema	boolean	Indicates whether the union is of two disjointed datasets. Set to True to allow joining of two datasets having no common fields.
label	string	Required. Label of the batch calculation job union.
name	string	Required. Name of the batch calculation job union.
sources	string[]	Names of the source nodes.

BatchCalcJobWritebackObject

Represents a collection of fields relating to the object in which the results of the data processing engine are written back.

Fields

Field Name	Field Type	Description
description	string	Descriptions of the batch calculation job writeback object.
fields	BatchCalcJobWritebackMapping[]	Collection of the writeback fields.
isChangedRow	boolean	Indicates whether a row in the write back object is changed. Set to True to write back the changed rows.
label	string	Required. Name of the write back object.
name	string	Required. Name of the batch calculation job write back object.
operationType	BatchCalcJobWritebackOpn (enumeration of type string)	Required. Type of operation specified. Valid values are: • Insert • Update • Upsert
sourceName	string	Required. Name of the source node associated with the write back object.
targetObjectName	string	Required. Object that is inserted or upserted by the data processing engine.
writebackSequence	integer	Sequence in which the target object is updated by the data processing engine.
writebackUser	string	ID of the user whose permissions decide which objects and fields of the target object can be updated.

BatchCalcJobWritebackMapping

Represents a collection of fields relating to the mapping between results and the fields in the target object.

Fields

Field Name	Field Type	Description
`parentName`	string	Name of the lookup object. Required only when the `relationshipName` field is defined.
`relationshipName`	string	Name of the lookup relationship.
`sourceFieldName`	string	Required. Name of the field in the source node that is written back.
`targetFieldName`	string	Required. Name of the sObject field to which the results are written back.

Declarative Metadata Sample Definition

The following is an example of a BatchCalcJobDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<BatchCalcJobDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
   <aggregates>
      <description>Aggregate Description</description>
      <fields>
         <aggregateFunction>Count</aggregateFunction>
         <alias>NameCount</alias>
         <sourceFieldName>Name</sourceFieldName>
      </fields>
      <groupBy>ContactId</groupBy>
      <groupBy>Name</groupBy>
      <label>AggregateOpportunities</label>
      <name>AggregateOpportunities</name>
      <sourceName>Opportunity</sourceName>
   </aggregates>
   <appends>
      <description>Append desc</description>
      <isDisjointedSchema>true</isDisjointedSchema>
      <label>AppendAllAccounts</label>
      <name>AppendAllAccounts</name>
      <sources>AccountsOfManufacturingIndustry</sources>
      <sources>MediaIndustry</sources>
   </appends>
   <datasources>
      <description>Desc Contact</description>
      <fields>
         <alias>Id</alias>
         <name>Id</name>
      </fields>
      <fields>
         <alias>LastName</alias>
         <name>LastName</name>
      </fields>
      <label>Contact</label>
      <name>Contact</name>
```

```
      <sourceName>Contact</sourceName>
      <type>StandardObject</type>
   </datasources>
   <datasources>
      <fields>
         <alias>Name</alias>
         <name>Name</name>
      </fields>
      <fields>
         <alias>ContactId</alias>
         <name>ContactId</name>
      </fields>
      <label>Opportunity</label>
      <name>Opportunity</name>
      <sourceName>Opportunity</sourceName>
      <type>StandardObject</type>
   </datasources>
   <description>Calculates and creates transaction journal records based on the orders
placed by the loyalty program members. The transaction journals are used to accrue points
 to the member.</description>
   <filters>
      <criteria>
         <operator>Equals</operator>
         <sequence>1</sequence>
         <sourceFieldName>LastName</sourceFieldName>
         <value>Salesforce</value>
      </criteria>
      <description>Filter Desc</description>
      <filterCondition>1</filterCondition>
      <isDynamicFilter>false</isDynamicFilter>
      <label>AccountsOfManufacturingIndustry</label>
      <name>AccountsOfManufacturingIndustry</name>
      <sourceName>AccountOpportunities</sourceName>
   </filters>
   <isTemplate>false</isTemplate>
   <joins>
      <description>Left Outer Join</description>
      <fields>
         <alias>ContactId</alias>
         <sourceFieldName>Id</sourceFieldName>
         <sourceName>Contact</sourceName>
      </fields>
      <fields>
         <alias>LastName</alias>
         <sourceFieldName>LastName</sourceFieldName>
         <sourceName>Contact</sourceName>
      </fields>
      <fields>
         <alias>NameCount</alias>
         <sourceFieldName>NameCount</sourceFieldName>
         <sourceName>AggregateOpportunities</sourceName>
      </fields>
      <fields>
         <alias>OpportunityName</alias>
```

```
         <sourceFieldName>Name</sourceFieldName>
         <sourceName>AggregateOpportunities</sourceName>
      </fields>
      <joinKeys>
         <primarySourceFieldName>Id</primarySourceFieldName>
         <secondarySourceFieldName>ContactId</secondarySourceFieldName>
      </joinKeys>
      <label>AccountOpportunities</label>
      <name>AccountOpportunities</name>
      <primarySourceName>Contact</primarySourceName>
      <secondarySourceName>AggregateOpportunities</secondarySourceName>
      <type>LeftOuter</type>
   </joins>
   <label>Create Transaction Journals Based on Orders</label>
   <parameters>
      <dataType>Date</dataType>
      <defaultValue>2020-01-01</defaultValue>
      <description>Desc TextParameter</description>
      <isMultiValue>false</isMultiValue>
      <label>DateParameter</label>
      <name>DateParameter</name>
   </parameters>
   <parameters>
      <dataType>Filter</dataType>
     <defaultValue>{&quot;filterCondition&quot;: &quot;1 AND 2&quot;, &quot;criteria&quot;:
 [{&quot;sourceFieldName&quot;: &quot;NameCount&quot;,&quot;operator&quot;:
&quot;GreaterThan&quot;,&quot;value&quot;: &quot;20&quot;,&quot;sequence&quot;:
&quot;1&quot;}, {&quot;sourceFieldName&quot;: &quot;Name&quot;,&quot;operator&quot;:
&quot;Equals&quot;,&quot;value&quot;: &quot;Salesforce&quot;,&quot;sequence&quot;:
&quot;2&quot;}]}</defaultValue>
      <isMultiValue>false</isMultiValue>
      <label>FilterParameter</label>
      <name>FilterParameter</name>
     </parameters>
     <parameters>
      <dataType>Numeric</dataType>
      <defaultValue>5000</defaultValue>
      <description>Desc TextParameter</description>
      <isMultiValue>false</isMultiValue>
      <label>NumericParameter</label>
      <name>NumericParameter</name>
   </parameters>
   <parameters>
      <dataType>Text</dataType>
      <defaultValue>@salesforce.com</defaultValue>
      <description>Desc TextParameter</description>
      <isMultiValue>false</isMultiValue>
      <label>TextParameter</label>
      <name>TextParameter</name>
   </parameters>
   <processType>DataProcessingEngine</processType>
   <status>Inactive</status>
   <transforms>
      <description>transforms Desc</description>
```

```
      <expressionFields>
         <alias>NewLastName</alias>
         <dataType>Text</dataType>
         <expression>{LastName} + {$TextParameter}</expression>
             <length>80</length>
      </expressionFields>
      <label>ManufacturingIndustry</label>
      <name>ManufacturingIndustry</name>
      <sourceName>AccountsOfManufacturingIndustry</sourceName>
      <transformationType>Expression</transformationType>
   </transforms>
   <transforms>
      <droppedFields>
         <sourceFieldName>NewLastName</sourceFieldName>
      </droppedFields>
      <label>MediaIndustry</label>
      <name>MediaIndustry</name>
      <sourceName>ManufacturingIndustry</sourceName>
      <transformationType>Slice</transformationType>
   </transforms>
   <writebacks>
      <fields>
         <sourceFieldName>LastName</sourceFieldName>
         <targetFieldName>LastName</targetFieldName>
      </fields>
      <isChangedRow>false</isChangedRow>
      <label>exportToContact</label>
      <name>exportToContact</name>
      <description>Export To Contact</description>
      <operationType>Insert</operationType>
      <sourceName>AppendAllAccounts</sourceName>
      <targetObjectName>Contact</targetObjectName>
      <writebackSequence>1</writebackSequence>
   </writebacks>
</BatchCalcJobDefinition>
```

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<!--
   ~ Copyright 2020 salesforce.com, inc.
   ~ All Rights Reserved
   ~ Company Confidential
-->
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
   <types>
      <members>*</members>
      <name>BatchCalcJobDefinition</name>
   </types>
   <version>[ftest]</version>
</Package>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character `*` (asterisk) in the `package.xml` manifest file. For information about using the manifest file, see Deploying and Retrieving Metadata with the Zip File.

Flow for Financial Services Cloud

Represents the metadata associated with a flow. With Flow, you can create an application that navigates users through a series of screens to query and update records in the database. You can also execute logic and provide branching capability based on user input to build dynamic applications.

Flow

Financial Services Cloud exposes additional FlowProcessType values on the Flow type in Metadata API.

Field Name	Field Type	Description
`processType`	FlowProcessType (enumeration of type string)	The type of the flow, as determined by the active version. Valid values added by Financial Services Cloud include: • `FSCLending`— A flow for Financial Services Cloud Mortgage. This value is available in API version 46.0 and later.

FlowActionCall

Financial Services Cloud exposes additional actionType values for the FlowActionCall Metadata type.

Field Name	Field Type	Description
`actionType`	hvocdeActionType (enumeration of type string)	Required. The action type. Additional valid values only for Financial Services Cloud include: • `createFinancialRecords`—Creates person accounts, contacts, financial accounts, properties, assets, and liabilities from a residential loan application. Available in API version 49.0 and later.

SEE ALSO:

Metadata API Developer Guide: Flow

Icon

Represents the mapping of custom icons to objects.This type extends the Metadata metadata type and inherits its `fullName` field.

File Suffix and Directory Location

Icon components have the suffix `.icon` and are stored in the `icons` folder.

Version

Icon components are available in API version 49.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the Health Cloud or Financial Services Cloud license.

Fields

Field Name	Field Type	Description
`image`	string	Required. The image file that is mapped to the object. Use the ContentAsset metadata type to hold the icon image referenced in the `image` field.
`key`	string	Required. A field value in the object. For example, with the `PersonLifeEvent`object, possible values for `key` can be `birthday`, `marriage`, `childbirth`, and so on.
`usageType`	IconUsageType (enumeration of type string)	Required. The object that is mapped to the image. Valid values are: • `PersonLifeEvent` • `InsurancePolicy` • `BusinessMilestone`

Declarative Metadata Sample Definition

The following is an example of an Icon component.

```
<?xml version="1.0" encoding="UTF-8"?>
<Icon xmlns="http://soap.sforce.com/2006/04/metadata">
    <usageType>PersonLifeEvent</usageType>
    <key>Birth</key>
    <image>image</image>
</Icon>
```

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>icons</members>
        <name>Icon</name>
    </types>
    <version>49.0</version>
</Package>
```

IndustriesSettings

Represents settings for industries verticals like Financial Services Cloud, Consumer Goods Cloud, and Health Cloud.This type extends the Metadata metadata type and inherits its `fullName` field.

In the package manifest, all organization settings metadata types are accessed using the Settings name. See Settings for more details.

File Suffix and Directory Location

IndustriesSettings are stored in a single file named `Industries.settings` in the `settings` directory.

Version

Industries settings are available in API version 47.0 and later.

Special Access Rules

Some settings are specific to an industry vertical and are only available to customers with org editions where the vertical is enabled. Users need the FSC Insurance permission set to access the settings available in editions with Financial Services Cloud.

Fields for Financial Services Cloud

Field Name	Field Type	Description
`allowMultipleProducersToWorkOnSamePolicy`	boolean	Indicates whether multiple producers can be assigned to the same insurance policy. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableAccessToMasterListOfCoverageTypes`	boolean	Indicates whether insurance agents can access the master list of coverage types. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableBlockResourceAvailabilityOrgPref`	boolean	Indicates whether Lightning Scheduler service appointments are added to users' Salesforce calendars. For example, if set to `false`, users don't see their service appointments on their calendars. The default is `false`.
`enableCompliantDataSharingForAccount`	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Account object. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableEinsteinDocReaderEnabled`	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Opportunity object. The default is `false`. This field is available in editions where Financial Services Cloud is enabled.
`enableEventManagementOrgPref`	boolean	Indicates whether users can add multiple service resources to a service appointment. The default is `false`.

Field Name	Field Type	Description
enableFSCInsuranceReport	boolean	Indicates whether sales managers can access the dashboard and prebuilt reports. The default is false. This field is available in API version 48.0 and later in editions where Financial Services Cloud is enabled. Note: This setting can be enabled only if the allowMultipleProducersToWorkOnSamePolicy setting is already set to true.
enableInteractionSummaryPref	boolean	Indicates whether the Interaction Summary setting is enabled for your org. The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableInteractionSummaryRoleHierarchy	boolean	Indicates whether the Role-Hierarchy-Based Sharing for Interaction Summaries is enabled for your org. The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableManyToManyRelationships	boolean	Indicates whether insurance can manage many-to-many relationships between claims and cases, claims and assets, and assets and policy participants. For example, if set to true, agents can handle multiple claims through one case or have multiple cases handling one claim. The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableMortgageRlaTotalsOrgPref	boolean	Indicates whether the calculation of assets and liabilities for residential loan application records is enabled for your org (true) or not (false). The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableMultiResourceOrgPref	boolean	Indicates whether users can add multiple service resources to a service appointment. The default is false.
enableOverbookingOrgPref	boolean	Indicates whether users can add multiple service appointments to a single time slot for a service resource. If set to false, concurrent time slots are visible, but can't be modified. The default is false.
enableRBLUsingCalcService	boolean	Indicates whether Roll-by-Lookup (RBL) Using Calc Service is enabled for your org. The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableRecordRollup	boolean	Indicates whether Record Rollup Optimization is enabled for your org. The default is false. This field is available in editions where Financial Services Cloud is enabled.
enableReferralScoring	boolean	Indicates whether Einstein Referral Scoring for Financial Services Cloud is enabled for your org (true) or not (false). The default is false. This field is available in editions where Financial Services Cloud is enabled.
loanApplicantAddressAutoCreation	boolean	Indicates whether automatic generation of loan applicant records for new residential loan applications that are associated with person accounts is enabled for your org. The default is false. This field is

Field Name	Field Type	Description
		available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
`loanApplicantAutoCreation`	boolean	Indicates whether automatic generation of loan applicant address records for new residential loan applications that are associated with person accounts is enabled for your org. The default is `false`. This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.

Fields for Health Cloud

Field Name	Field Type	Description
`enableClinicalDataModel`	boolean	Indicates whether Clinical Data Model is enabled for your org. The default is `false`. Available in API version 51.0 and later.
`enableMultipleCareProgramEnrolleeOrgPref`	boolean	Indicates whether Multiple Care Program Enrollee is enabled for your org. Available in API version 49.0 and later.
`enableMedicalDeviceEnabled`	boolean	Indicates whether the Intelligent Sales features are enabled.
`enableProviderSearchSyncOrgPref`	boolean	Indicates whether provider data search is synced every six hours. The default is `false`. This field is available in editions where Health Cloud is enabled.
`enableVisitInventoryEnabled`	boolean	Indicates whether the visit data model is enabled.

Fields for Consumer Goods Cloud

Field Name	Field Type	Description
`enableObjectDetection`	boolean	Indicates whether Einstein Object Detection is enabled for your org. The default is `false`. This field is available in editions where Consumer Goods Cloud is enabled.

Declarative Metadata Sample Definition

The following is an example of a Industries.Settings metadata file.

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesSettings xmlns="http://soap.sforce.com/2006/04/metadata">
    <enableEventManagementOrgPref>true</enableEventManagementOrgPref>
    <enableMultiResourceOrgPref>false</enableMultiResourceOrgPref>
    <enableOverbookingOrgPref>true</enableOverbookingOrgPref>
```

```
    <enableBlockResourceAvailabilityOrgPref>true</enableBlockResourceAvailabilityOrgPref>

    <enableAccessToMasterListOfCoverageTypes>true</enableAccessToMasterListOfCoverageTypes>

    <enableManyToManyRelationships>true</enableManyToManyRelationships>

<allowMultipleProducersToWorkOnSamePolicy>false</allowMultipleProducersToWorkOnSamePolicy>

    <enableMortgageRlaTotalsOrgPref>true</enableMortgageRlaTotalsOrgPref>
    <enableObjectDetection>true</enableObjectDetection>
    <enableProviderSearchSyncOrgPref>true</enableProviderSearchSyncOrgPref>
    <enableReferralScoring>true</enableReferralScoring>
    <enableFSCInsuranceReport>true</enableFSCInsuranceReport>
</IndustriesSettings>
```

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>Industries</members>
        <name>Settings</name>
    </types>
    <version>47.0</version>
</Package>
```

ParticipantRole

Represents details, such as the name and associated default access level, for a role that a participant can have in the context of a parent record.

Parent Type

This type extends the Metadata metadata type and inherits its `fullName` field.

File Suffix and Directory Location

`ParticipantRole` components have the suffix `.participantRole` and are stored in the `participantRoles` folder.

Version

ParticipantRole components are available in API version 50.0 and later.

Fields

Field Name	Description
`defaultAccessLevel`	**Field Type** picklist

Field Name	Description
	Description Required. The default sharing access granted to the participant role. Valid values are: • `Edit`—Read/Write • `None` • `Read`—Read Only
`isActive`	**Field Type** boolean **Description** Indicates whether the participant role is activated.
`masterLabel`	**Field Type** string **Description** Required. The name for the participant role.
`parentObject`	**Field Type** string **Description** Required. The parent object for the participant role. Valid values are: • `Account` • `InteractionSummary` Available in API version 51.0 and later. • `Opportunity`

Declarative Metadata Sample Definition

The following is an example of a ParticipantRole component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ParticipantRole xmlns="http://soap.sforce.com/2006/04/metadata">
    <defaultAccessLevel>Read</defaultAccessLevel>
    <isActive>true</isActive>
    <masterLabel>Advisor</masterLabel>
    <parentObject>Account</parentObject>
</ParticipantRole>
```

The following is an example `package.xml` that references the previous definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
```

```
    <types>
        <members>*</members>
        <name>ParticipantRole</name>
    </types>
    <version>50.0</version>
</Package>
```

Wildcard Support in the Manifest File

This metadata type supports the wildcard character `*` (asterisk) in the `package.xml` manifest file. For information about using the manifest file, see Deploying and Retrieving Metadata with the Zip File.

FINANCIAL SERVICES CLOUD STANDARD INVOCABLE ACTIONS

Create person accounts, financial accounts, and related records from a residential loan application for Financial Services Cloud. For more information on standard invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

Create Financial Records Actions

Creates person accounts, contacts, financial accounts, properties, assets, and liabilities from a residential loan application.

This object is available in API version 49.0 and later for users with a Financial Services Cloud license.

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/createFinancialRecords`

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

`Authorization: Bearer` ***`token`***

Inputs

Input	Details
`recordId`	**Type** ID **Description** ID of the residential loan application.

Outputs

Input	Details
`status`	**Type** string **Description** Whether the creation process succeeded, partially succeeded, or failed.

Input	Details
customerPropertiesIdList	**Type** string **Description** List of IDs created for CustomerProperty records.
assetsAndLiabilitiesIdList	**Type** string **Description** List of IDs created for AssetsAndLiabilities records.
financialAccountsIdList	**Type** string **Description** List of IDs created for FinancialAccount records.
personAccountsIdList	**Type** string **Description** List of IDs created for PersonAccount records.
errors	**Type** string **Description** List of errors that occurred during the creation process.

Example

JSON Request Body

```
{
  "recordId" : "0cdB0000000CbVGIA0"
}
```

JSON Response Body

```
{
    "customerPropertiesIdList" : [ "0b8B0000000GnjdIAC" ],
    "assetsAndLiabilitiesIdList" : [ "a03B000000735LrIAI", "a03B000000735LsIAI",
"a03B000000735LtIAI" ],
    "personAccountsIdList" : [ "001B000001K8Zx5IAF" ],
    "errors" : [ ],
    "status" : "SUCCESS",
    "financialAccountsIdList" : [ "a0EB000000227WoMAI", "a0EB000000227WpMAI",
"a0EB000000227WqMAI" ]
  }
```

Data Processing Engine Actions

Run an active Data Processing Engine definition. This action executes a Data Processing Engine definition asynchronously.

A Data Processing Engine definition transforms data from your Salesforce org and writes back the results to your org. For more information about running Data Processing Engine definitions, see Run a Data Processing Engine Definition in Salesforce Help.

This object is available in API version 51.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/custom/dataProcessingEngineAction`

Formats

JSON

HTTP Methods

GET, POST

Authentication

`Authorization: Bearer` ***`token`***

Inputs

Use the GET method to retrieve input parameters of a Data Processing Engine definition. The Data Processing Engine action uses input variables to execute the data processing engine definition and generate a batch job ID. The input values vary according to the input fields in the Data Processing Engine definition.

Outputs

Output	Details
`batchJobId`	**Type** string **Description** ID of the batch job generated after the request is successful. This ID is used to track the progress of the batch job in Monitor Workflow Services.

Usage

JSON Sample Request

```
{
   "PointsAccrual" : {
      "memberTier" : "Gold",
      "minimumPointBalanceRequired" : "50000",
      "pointType" : "non-qualifying"
```

```
    }
}
```

JSON Sample Response

```
{
   "actionName":"PointsAccrual",
      "errors":null,
      "isSuccess":true,
      "outputValues":{
        "batchJobId":"0lMxx0000A000001EAA"
      }
}
```

FINANCIAL SERVICES CLOUD CUSTOM METADATA TYPES

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.

ReferralRecordTypeMapper

Maps a new custom record type on the Lead object, used to represent a new type of referral, to the standard Referral 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
`LeadRecordType__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of your new custom record type on the Lead object being mapped to the Financial Services Cloud Referral record type. Note: This field is for Salesforce internal-use only. By default, this field doesn't appear on any page layout.
`LeadRecordTypeNamespace__c`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace for Lead record type being mapped.

FINANCIAL SERVICES CLOUD CUSTOM TRIGGERS

Financial Services Cloud Custom Triggers

Custom triggers ensure that data flows correctly through the Financial Services Cloud custom objects and fields.

Custom triggers use the `FinServ` namespace prefix. For example, FinServ__AccountTrigger, which 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

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

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 one trigger. The following list explains trigger behavior by object.

sObjects

Note: The Account triggers support orgs using either the individual or person account models. Where the person account model is in use, the steps involving the creation of a Contact are not needed.

Account

Before insert: If the record type indicates that the account isn't a portion of an individual, `IndividualType` is set to blank.

After insert: If the user creates an account of record type Individual, creates an individual contact linked to the account. Also assigns topics based on the value in the field after an account has been created.

The steps to create an individual contact and assign topics are:

- For each account created, creates a contact.
- For each contact, adds `AccountId`.
- For each account, in a **future** method, adds `ContactId`.
- Sets `IndividualId__c` to `AccountId` concatenated with the current date.

Before update: Validates that the update on the account:

- Hasn't changed the account's record type from individual to another record type, and hasn't changed from one individual record type to another.
- Hasn't changed the account's record type from another record type to an individual record type.

After update: Syncs the contact associated with the updated account to reflect the updated fields. The following fields are synced:

- `AccountName`
- `OwnerId`
- `IndividualType__c`
- `RecordTypeId`

Before delete: Helps perform cascade deletes. Gathers all the 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 as follows.

- For each account that is passed, creates a contact.
- For each contact, adds `AccountId`.
- For each account, in a **future** method, adds `ContactId`.
- Sets `IndividualId__c` to `AccountId` concatenated with the current datetime.

After insert: Validates that the referenced individual account does not have a contact associated with it. This check is bypassed during a lead conversion.

Before update: Validates that the update on the account record:

- Hasn't changed the record type of the account from individual to another record type.
- Hasn't changed the record type of the account from any other record type to an individual.

- Validates that the referenced individual account does not 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`

Reciprocal Role

After insert: If the role has the flag to create a reciprocal role set, creates a Reciprocal Role sObject for the inverse role.

Before delete: Where there is an inverse Reciprocal Role sObject record, delete that record.

RollupByLookupConfig

Before insert: Validates each new RollupByLookupConfig object according to these rules:

- Cannot insert a duplicate RollupByLookupConfig object. Duplicate records are those that share the same combination of `ToObject__c`, `ToField__c`, and `LookupField__c`.
- Cannot exceed 40 active RollupByLookupConfig objects.
- The fields and lookups on the RollupByLookupConfig object must be valid.
- The Where Clause field must contain a correctly formatted SQL expression.

Before update: Performs the same actions as before insert.

Before delete: Validates that the RollupByLookupConfig object isn't active (active objects cannot be deleted).

RBLFilterCriteria

Before insert: Validates each new RBLFilterCriteria object according to these rules:

- A RBLFilterCriteria object cannot be inserted when its parent is active.
- The fields on the RBLFilterCriteria object must be valid.
- The Operator must be valid ('greater than', 'equals', 'greater than or equals to', 'contains', 'not equal to', 'less than', 'less than or equal to', 'not contains', 'not like', 'starts with', 'ends with', 'in').

Before update: Performs the same actions as before insert.

Before delete: Validates that the RBLFilterCriteria object's parent RollupByLookupConfig object isn't active (RBLFilterCriteria objects with an active parent RollupByLookupConfig object cannot be deleted).

Note: Alerts and Securities sObjects don't have triggers.

Relation sObjects

Note: Rollup calculation triggers are fired when Enable Rollup Summary is enabled in the Wealth Application Config custom setting. For more details, see Temporarily Disable Rollups to Accelerate Data Loads.

AccountContactRelation (ACR)

Before insert: Populates `RecordTypeId` and `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 have changed.

Before update: Performs the same actions as before insert.

After update: Performs the same actions as after 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 have changed.

AccountAccountRelation (AAR)

After insert: If the auto-create inverse setting is selected, creates the inverse record.

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

Before delete: If the auto-create inverse setting is selected, delete the inverse record of the AAR.

ContactContactRelation (CCR)

After insert: If the auto-create inverse setting is selected, creates the inverse record.

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

Before delete: If the auto-create inverse setting is selected, deletes the inverse record of the CCR.

Rollup sObjects

Note: Rollup sObject triggers provide for updating `Household__c`, which points to the account portion of the group that they roll up to. Usually, the rollup calculation is also calculated.

Household triggers are fired when Enable Group Record Rollups is enabled in the Wealth Application Config custom setting. After the triggers are fired, any active rollup calculations are performed when Enable Rollup Summary is enabled in the Wealth Application Config. For more details, see Temporarily Disable Rollups to Accelerate Data Loads.

Financial Account

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

After insert:

- Creates a primary owner financial account role for the new financial account.
- If defined, creates joint owner roles and user-selected roles.
- Performs the rollup calculation.

Before update: Performs the same actions as before insert.

After update: Performs the same actions as before insert.

After delete: Performs the rollup calculation.

Financial Account Role (FAR)

Before insert: If `RelatedContact__c` of the FAR record is associated with an individual account, updates `RelatedAccount__c` to that of the individual account.

After insert: For FAR records of type Joint Owner, updates the Joint Owner field on the associated Financial Account record, then performs the rollup calculations.

Before update: Performs the same actions as before insert and, if the user has chosen to deactivate the FAR records, sets the end day to the current day.

After update: Performs the rollup calculations.

Before delete: Blocks the deletion of any FAR records of type Primary Owner. FAR records of type Primary Owner must be deleted from the associated Financial Account record. For FAR records of type Joint Owner, updates the Joint Owner field on the associated Financial Account record.

After delete: Performs the rollup calculations.

Assets and Liabilities

Before insert: Sets `Household__c` to the account portion of the group that it's rolling up to.

Before update: Performs the same action as before insert.

Financial Goals

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

Before update: Performs the same action as before insert.

Financial Holdings

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

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

Revenue

After insert: Performs the rollup calculations.

After update: Performs the rollup calculations.

After delete: Performs the rollup calculations.

Tasks

Before insert: Sets `Household__c` of the Task record to the account portion of the group that the task is rolling up to.

After insert: Updates the Next and Last interaction for each Contact that is associated with the task.

Before update: Performs the same action as before insert.

After update: Performs the same action as after insert.

After delete: Performs the same action as after insert.

Events

Before insert: Sets `Household__c` of the Event record to the account portion of the group that the event is rolling up to.

After insert: Updates the Next and Last interaction for each Contact that is associated to the event.

Before update: Performs the same action as before insert.

After update: Performs the same action as after insert.

After delete: Performs the same action as after insert.

Leads

After update: If not done, sets the converted lead contact as the primary contact on the account. The opportunity linked to the lead is updated with the mapped record type.

Opportunities

Before insert: Sets `Household__c` of the Opportunity record to the account portion of the group that the opportunity is rolling up to.

Before update: Performs the same action as before insert.

Insurance Policy

Before insert: Sets `Household__c` of the Insurance Policy record to the account portion of the household that the insurance policy is rolling up to.

Before update: Performs the same action as before insert.

Claim

Before insert: Sets `Household__c` of the Claim record to the account portion of the household that the claim is rolling up to.

Before update: Performs the same action as before insert.

FINANCIAL SERVICES CLOUD PLATFORM EVENT

Use platform events to connect business processes in Salesforce and external apps through the exchange of real-time event data. Platform events are secure and scalable messages that contain data. Publishers publish event messages that subscribers receive in real time. To customize the data published, define platform event fields.

SEE ALSO:

Platform Events Developer Guide

BatchJobStatusChangedEvent

Notifies subscribers of when a batch job is completed in a flow. This object is available in API version 51.0 and later.

Supported Calls

`describeSObjects()`

Supported Subscribers

Subscriber	Supported?
Flows	✔

Fields

Field	Details
`BatchJob`	**Type** string **Description** The unique identifier of the batch job.
`BatchJobDefinition`	**Type** string **Properties** Nillable **Description** The unique identifier of the batch job's definition.

Field	Details
`EndDateTime`	**Type** dateTime **Properties** Nillable **Description** The timestamp for when the batch job execution is complete.
`ReplayId`	**Type** string **Properties** Nillable **Description** Represents an ID value that is populated by the system and refers to the position of the event in the event stream. Replay ID values aren't guaranteed to be contiguous for consecutive events. A subscriber can store a replay ID value and use it on resubscription to retrieve missed events that are within the retention window.
`StartDateTime`	**Type** dateTime **Properties** Nillable **Description** The timestamp for when the batch job execution is started.
`Status`	**Type** picklist **Properties** Restricted picklist **Description** The status of the batch job. Possible values are: • `Cancelled`—Canceled • `Failure` • `Success`

DATA PROCESSING ENGINE AND MONITOR WORKFLOW SERVICES

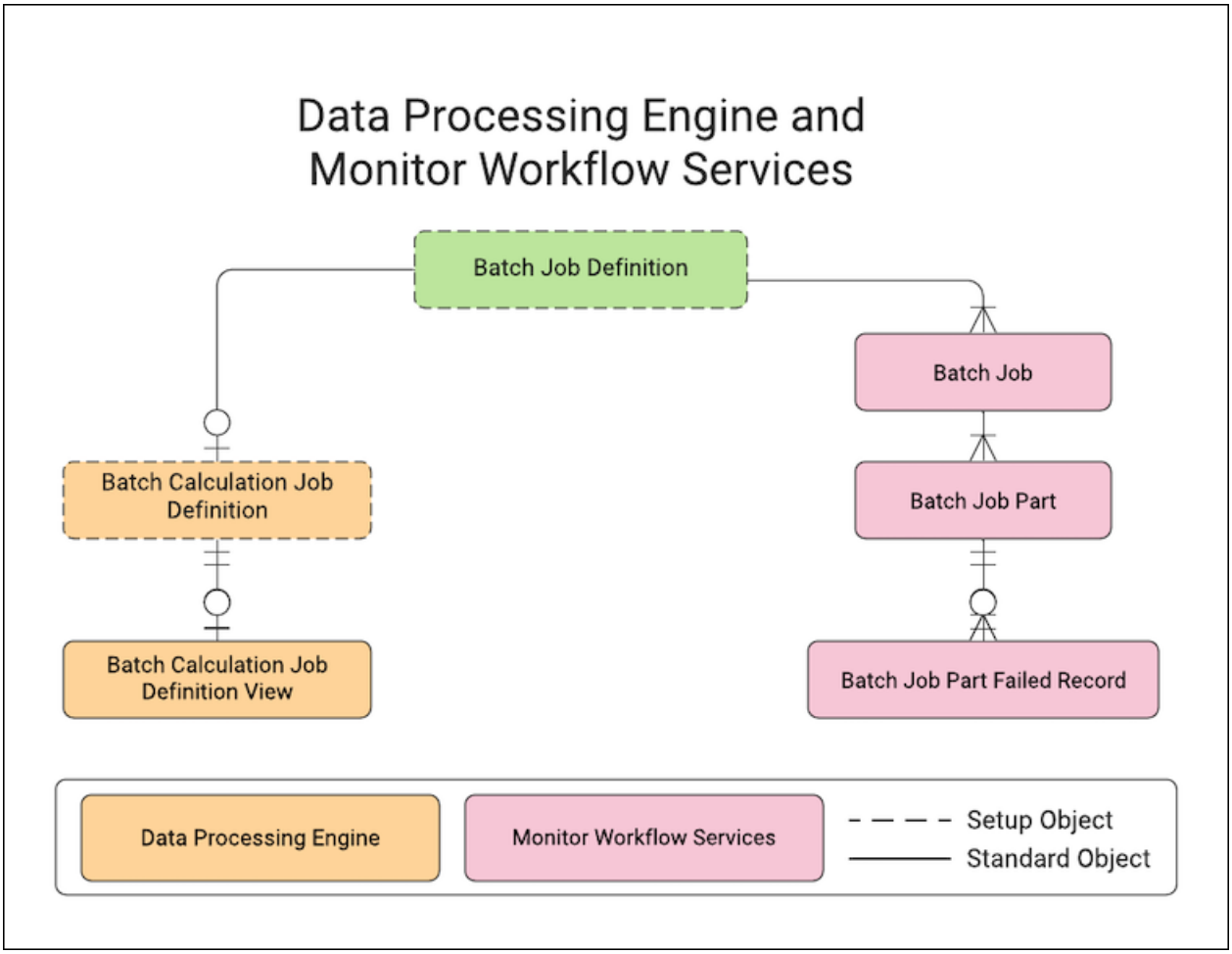
Data Processing Engine helps you transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects using Data Processing Engine definitions. After you activate a Data Processing Engine definition, you can run it. Each run can be tracked using Monitor Workflow Services.

Here's the data model for Data Processing Engine and Monitor Workflow Services:

EDITIONS

Available in: Lightning Experience

Available in: Data Processing Engine is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud, Loyalty Management, or Rebate Management



Here is the list of developer resources you can use for Data Processing Engine:

- Standard Object
  - BatchCalcJobDefinitionView on page 38
- Setup Objects
  - BatchCalcJobDefinition on page 379
  - BatchJobDefinition on page 382

  To know more about setup objects, see the Tooling API Developer Guide.
- Invocable Actions
  - dataProcessingEngineAction on page 508
- Platform Event
  - BatchJobStatusChangedEvent on page 520

Here is the list of standard objects for Monitor Workflow Services:

- BatchJob on page 41
- BatchJobPart on page 44
- BatchDataPartFailedRecord on page 47

To know more about Data Processing Engine, see the Data Processing Engine help.