

Financial Services Cloud Developer Guide

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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. `FinServe__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.

SEE ALSO:

[Financial Services Cloud Admin Guide](#)

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
AssetCategory__c	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__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The market capitalization and investing style. Possible values are: • Large Growth • Large Value • Large Blend • Small Growth • Small Value • Small Blend • Mid-Cap Growth

Field Name	Details
	• Mid-Cap Value • Mid-Cap Blend
AssetClass__c	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
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
IsDisputed__c	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the financial transaction is a disputed transaction.
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 <code>RecordType.Name</code> 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 <code>RecordType.Name</code> and can't be changed.

Field Name	Details
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.
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
CreatedByMe__c	Type integer Properties Create, Filter, Group, Nillable, Sort, Update Description Indicates whether the user contact was converted from this lead.
CreditRating__c	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Assessment of creditworthiness. Valid values: • Excellent • Good • Fair • Poor

Field Name	Details
CreditScore__c	Type double Properties Create, Filter, Nillable, Sort, Update Description Numerical rating of borrower's creditworthiness.
ConversionDateTime__c	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The time and date on which the lead was converted.
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 <code>RecordType.Name</code> and can't be changed.
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

Field Name	Details
	Description Individual's financial category. Valid values: • Borrower • Investor • Relational • Transaction
DisputeReason__c	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Reason for the dispute. Valid values are: • Duplicate Transactions • Transaction not recognized • Suspected Fraud • Others
EventLocation__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update 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 • EventLocationStreet
FinancialAccount__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field Name	Details
	Description Represents the financial account, such as an investment account, bank account, or insurance policy, that is associated with this case.
FinancialInterests__c	Type multipicklist Properties Create, Filter, Nillable, Update Description This individual's financial areas of interest. Valid values: • Municipal Bonds • Fixed Income • Energy • Technology • CRM • AAPL • GOOG • Retirement • College Planning
Household__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The household with which this opportunity is associated.
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

Field Name	Details
	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 • 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

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

Field Name	Details
	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 Description Individual's lifetime net asset value to your financial institution.
MarketingSegment__c	Type multipicklist Properties Create, Filter, Nillable, Update

Field Name	Details
	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.
NextStatementDate__c	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Date of the next statement.
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 <code>RecordType.Name</code> 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.
Stage__c	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the stage of the deal. Possible values are: • Closed • Execution • Mandate • Pitch
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

Field Name	Details
	• Medium Term • Short Term
TotalAUMJointOwner__c	Type currency Properties Create, Defaulted on create, Filter, Nillable, Sort, Update Description Total value of financial accounts that your company manages, for which this individual is the joint owner of jointly owned accounts.
TotalAUMPrimaryOwner__c	Type currency Properties Create, Defaulted on create, Filter, Nillable, Sort, Update Description Total value of financial accounts that your company manages, for which this individual is the primary owner of either separately owned or jointly owned accounts.
TotalBankDeposits__c	Type currency Properties Filter, Nillable, Sort 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

Field Name	Details
	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.
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 separately 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

Field Name	Details
	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 <code>Total Held Financial Accounts Joint</code>.
<code>TotalHeldFinAcctsPrimaryOwner__c</code>	Type double Properties Create, Filter, Nillable, Sort, Update Description Total value of held financial account balances, for which this individual is the primary owner of either separately owned or jointly owned accounts. Label is <code>Total Held Financial Accounts Primary</code>.
<code>TotalHouseholdPremiums__c</code>	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total premiums for all active policies for a policyholder's primary household.
<code>TotalInsurance__c</code>	Type currency Properties Filter, Nillable, Sort Description Value of this individual's insurance policies. Calculated as the sum of <code>TotalInsurancePrimaryOwner__c</code> and <code>TotalInsuranceJointOwner__c</code>.
<code>TotalInsuranceJointOwner__c</code>	Type currency Properties Create, Defaulted on create, Filter, Nillable, Sort, Update Description Total value of insurance policies, for which the individual is the joint owner of jointly owned accounts.

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

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

Field Name	Details
TotalNumberOfFinAccounts__c	Type Integer Properties Create, Filter, Group, Nillable, Sort, Update Description Total numbers of financial accounts that are managed by a specific firm.
TotalNumberOfFinAccountsJointOwner__c	Type Integer Properties Create, Filter, Group, Nillable, Sort, Update Description Total numbers of financial accounts for which the client is a joint owner.
TotalNumberOfFinAccountsPrimaryOwner__c	Type Integer Properties Create, Filter, Group, Nillable, Sort, Update Description Total numbers of financial accounts for which the client is the primary owner.
TotalOutstandingCredit__c	Type currency Properties Filter, Nillable, Sort Description Value of a client's total outstanding credit from the financial accounts that are managed by a specific firm.
TotalOutstandingCreditJointOwner__c	Type currency Properties Filter, Nillable, Sort Description Value of the total outstanding credit for which the client is a joint owner from the financial accounts that are managed by a specific firm.
TotalOutstandingCreditPrimaryOwner__c	Type currency Properties Filter, Nillable, Sort

Field Name	Details
	Description Value of the total outstanding credit for which the client is the primary owner from the financial accounts that are managed by a specific firm.
TotalPremium__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description Policyholder's total annual premium.
TotalRevenue__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description Total amount of revenue for a client.
TransactionSubtype__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Subtype of transaction, such as: • Cash Deposit • On-Us Check Deposit • Transit Check Deposit • Foreign Cash Deposit • Bill Payment • EFT • ATM Deposit • ATM Withdrawal • POS withdrawal • Misc. Credit • Misc. Debit • Loan Payment • Mortgage Payment • Credit Card Payment • Credit Card Cash Advance • Internal Funds Transfer

Field Name	Details
	• Reversal • Interest Earned • Fee • Merchant Charge
WaiverReason__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Reason for waiving the charges or fees, such as: • Duplicate fees charged • Fees Discovery • Maintain customer relationship • Notification not received • Others
WalletShare__c	Type percent Properties Create, Filter, Nillable, Sort, Update Description Read only. Percentage of this individual's financial assets that your company manages or administers. Calculated as the percent of financial accounts that are held (<code>FinancialAccount__c.HeldAway</code> 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 (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.
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

Field	Details
	Description Uniquely identifies the relationship between <code>Account</code> and <code>RelatedAccount__c</code> 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 <code>Account Relation Name</code>.
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 Description Account that <code>Account__c</code> is related to.
Role__c	Type reference Properties Create, Filter, Group, Sort, Update Description Role that describes how <code>RelatedAccount__c</code> is related to <code>Account__c</code>.
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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Date when the relationship started.

AccountContactRelation Standard and Custom Fields

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

Supported Calls

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

Fields

Field	Details
AccountId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the household (account) that the individual is a member of.
ContactId	Type reference
	Properties Create, Filter, Group, Sort
	Description ID of the contact that partially represents the individual.
CurrencyIsoCode	Type picklist
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description If multiple currencies is enabled, contains the currency ISO code associated with the record.

Field	Details
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 (<code>true</code>) or not (<code>false</code>). Label is <code>Active</code>.
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 (<code>true</code>). Otherwise, the relationship is indirect, which means that it relates the contact part of an individual to the household the individual belongs to (<code>false</code>). Label is <code>Direct</code>.
Primary__c	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates the primary member of a group (<code>true</code>) or not (<code>false</code>).
PrimaryGroup__c	Type boolean

Field	Details
	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 <code>PrimaryGroup__c</code> is set to <code>true</code>.
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  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

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.
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.

Field	Details
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 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.

Associated Objects

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

AccountParticipantFeed on page 574 (API version 52.0)

Feed tracking is available for the object.

AccountParticipantHistory on page 581 (API version 52.0)

History is available for tracked fields of the object.

Alert

Represents notifications to alert advisors about their client accounts.

Supported Calls

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

Fields

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

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

Field	Details
	- 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.
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

Field	Details
	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.
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

Field	Details
	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.

AuthFormRequestRecord

Junction between an Authorization Request and the Salesforce record that is being authorized. For example, the actual financial Salesforce records shared with third parties or any Salesforce record being shared as a result of the consent request. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
InfoAuthRequestFormId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Link to the Information Authorization Request Form related to this record. This is a relationship field. Relationship Name InfoAuthRequestForm Relationship Type Lookup Refers To InfoAuthRequestForm
InfoAuthorizationRequestId	Type reference Properties Create, Filter, Group, Sort Description Link to the Information Authorization Request related to this record. This is a relationship field. Relationship Name InfoAuthorizationRequest Relationship Type Lookup Refers To InfoAuthorizationRequest
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.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the authorization form request record.
RelatedRecordId	Type reference Properties Create, Filter, Group, Sort, Update Description Link to the Salesforce Record related to this record. This is a relationship field. Relationship Name RelatedRecord Relationship Type Lookup Refers To Account, BusinessMilestone, Campaign, Case, Claim, ClaimItem, Contact, Contract, DocumentChecklistItem, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, InsurancePolicyCoverage, Lead, Opportunity, OpportunityLineItem, Order, OrderItem, PersonLifeEvent, Quote, QuoteLineItem, ResidentialLoanApplication, Task

AuthorizationForm

Represents the specific version and effective dates of a form that is associated with consent, such as a privacy policy or terms and conditions. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
AssociatedRegulation	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The specific regulation to which this authorization form is related.
ConsentDurationDayCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Represents the number of days for which this Authorization Form is valid for, upon providing consent.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AuthorizationFormHistory](#) on page 581

History is available for tracked fields of the object.

[AuthorizationFormShare](#) on page 588

Sharing is available for the object.

AuthorizationFormConsent

Represents the date and way in which a user consented to an authorization form. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
Browser	Type string Properties Filter, Group, Nillable, Sort Description Collects data at the time of consent from the browser of the person providing consent.
ConsentExpirationDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description Specifies the length of time for which this particular consent, if accepted, lasts. This is a formula field that adds the Consent Captured Date time and Consent Duration Days on the Auth Form entity.
Email	Type email Properties Filter, Group, Nillable, Sort Description Collects data at the time of consent from the email address of the person providing consent.
InfoAuthRequestFormId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Identification of the Information Authorization Request Form related to this record. This field is a relationship field. Relationship Name InfoAuthRequestForm Relationship Type Lookup

Field	Details
	Refers To InfoAuthRequestForm
IP	Type string Properties Filter, Group, Nillable, Sort Description Collects data at the time of consent from the IP address of the person providing consent.
Location	Type string Properties Filter, Group, Nillable, Sort Description Collects data at the time of consent from the geo location of the person providing consent.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AuthorizationFormConsentChangeEvent](#) on page 572

Change events are available for the object.

[AuthorizationFormConsentHistory](#) on page 581

History is available for tracked fields of the object.

[AuthorizationFormConsentShare](#) on page 588

Sharing is available for the object.

AuthorizationFormText

Represents an authorization form's text and language settings. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description There can only be one Active Authorization Form Text at any given time with an Auth Form and locale combination. When a Consent Request is sent on a Data Use Purpose, all of the active authorization forms associated with the Data Use Purpose are selected, and all of the active authorization form text on the authorization forms is served to the person providing consent.
IsReadOnly	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The form is read only and not editable. When you make an Authorization Form Text active at any point, IsReadOnly must be permanently false.
LastActivationDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description You can sort the list of authorization texts based on their most recent activation date.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[AuthorizationFormTextFeed](#) on page 574

Feed tracking is available for the object.

[AuthorizationFormTextHistory](#) on page 581

History is available for tracked fields of the object.

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 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
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.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	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: - Inactive - Revoked - Draft - Verified

Field	Details
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.
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
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.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user who owns this record.

Field	Details
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.

Associated Objects

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

BankerFeed on page 574

Feed tracking is available for the object.

BankerHistory on page 581

History is available for tracked fields of the object.

BankerOwnerSharingRule on page 585

Sharing rules are available for the object.

BankerShare on page 588

Sharing is available for the object.

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.
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

Field	Details
	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.
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

Field	Details
	Description Date of the last payment made on the account.
MinimumPaymentDue__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description Minimum payment required by the due date.
OtherCredits__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description Other credits made during the billing period.
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

Field	Details
	Description Account balance at the end of the previous billing period.
Purchases__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description Total purchases made during the current billing period.
SourceSystemId__c	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description ID that uniquely identifies the individual in an external data source.
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 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

Field	Details
	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.
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

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user who owns this record.
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, Nillable, 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

Associated Objects

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

BranchUnitFeed on page 574

Feed tracking is available for the object.

BranchUnitHistory on page 581

History is available for tracked fields of the object.

BranchUnitOwnerSharingRule on page 585

Sharing rules are available for the object.

BranchUnitShare on page 588

Sharing is available for the object.

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.

Field	Details
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 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

Field	Details
	Description The date that this person was assigned this role for this branch unit.

Associated Objects

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

BranchUnitBusinessMemberFeed on page 574

Feed tracking is available for the object.

BranchUnitBusinessMemberHistory on page 581

History is available for tracked fields of the object.

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

Field	Details
	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.
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.

Associated Objects

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

BranchUnitCustomerFeed on page 574

Feed tracking is available for the object.

BranchUnitCustomerHistory on page 581

History is available for tracked fields of the object.

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 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

Field	Details
	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 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

Field	Details
	• Case • Lead (Lead and Referral) • Opportunity • Contact • InteractionSummary
RelatedRecordAssocCriteriaId	Type reference Properties Create, Filter, Group, Sort, Update Description The ID of the association criteria that triggered the creation of this record.
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 Description ID of the organization holding the license.

Field	Details
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 Description Name of other jurisdiction.

Field	Details
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 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

Field	Details
	- 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.
PeriodStart	Type dateTime Properties Create, Filter, Nillable, Sort, Update

Field	Details
	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 Description Current status for the license. Example values: • Authorized • Pending • Unverified

Field	Details
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.

[BusinessLicenseChangeEvent](#)

Change event tracking is available for the 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

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

Field	Details
	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 • New Partnership • New Product Launch
Name	Type string

Field	Details
	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 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.

Field	Details
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.
SourceSystem	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	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 (<code>true</code>) or inactive (<code>false</code>). Default is <code>true</code>.
BinNumber__c	Type double Properties CreateFilter, Nillable, SortUpdate Description Bank Identification number for this account.
FinancialAccount__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Financial account associated with this card.
OwnershipType__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Type of ownership for this card. Valid values: • Primary • Authorized • Other

Field	Details
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 Properties Create, Update

Field	Details
	Description The data payload for the integration, in JSON format. Here's an example. <pre>{ "FlowName": "", "ServiceRequestNumber": "", "ServiceRequestId": "", "AccountId": "", "FinancialAccountId": "" }</pre>
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 Properties Create, Filter, Group, Sort, Update

Field	Details
	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.
APRType__c	Type picklist

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

Field	Details
	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 Description Fee for exceeding the maximum monthly transaction limit.

Field	Details
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 Description Fee for mailing an account statement.

Field	Details
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 Properties Create, Filter, Nillable, Sort, Update Description The amount that was approved for the repair of damages based on an agent's inspection.

Field	Details
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 Properties Create, Filter, Nillable, Sort, Update Description The estimated cost of damages given by the owner or the repair shop.

Field	Details
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.
FinancialAuthorityStatus	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the financial authority status of the claim. Possible values are: • Authority Approved • Authority Denied • No Authority Pending • Pending Authority
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
IncidentId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The incident to which a claim pertains. For example, a claim associated with a catastrophe. This field is available in API version 54.0 and later. This is a relationship field.

Field	Details
	Relationship Name Incident Relationship Type Lookup Refers To Incident
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.
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

Field	Details
	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 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.

Field	Details
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 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

Field	Details
	• 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.
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

Field	Details
	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.
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

Field	Details
	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

Field	Details
	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.
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 Description The claim associated with this claim coverage.
ClaimItemId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The claim item associated with the claim coverage.
ClaimParticipantId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The claim participant associated with this claim coverage.

Field	Details
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 Description The insurance policy coverage associated with the claim coverage.
InsurancePolicyParticipantId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The insurance policy participant associated with the claim coverage.
InternalReserveMode	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	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 Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the claim coverage.
OwnerId	Type reference

Field	Details
	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

ClaimCoveragePaymentDetail

Represents the claim coverage amount that must be paid to a recipient for a loss or an expense payment. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AdjustedAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount the insurance carrier intends to pay for a loss or benefit after making adjustments for deductibles, copay, or coinsurance.
BenefitName	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the benefit associated with the claim coverage payment detail.
ClaimCoverageId	Type reference Properties Create, Filter, Group, Sort, Update Description The Claim Coverage associated with the Claim Coverage Payment Detail. This field is a relationship field. Relationship Name ClaimCoverage Relationship Type Lookup Refers To ClaimCoverage
ClaimCoverageReserveDetailId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Claim Coverage Reserve Detail associated with the Claim Coverage Payment Detail. This field is a relationship field. Relationship Name ClaimCoverageReserveDetail Relationship Type Lookup Refers To ClaimCoverageReserveDetail
ClaimParticipantRecipientId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Claim Participant Recipient associated with the Claim Coverage Payment Detail. This field is a relationship field.

Field	Details
	Relationship Name ClaimParticipantRecipient Relationship Type Lookup Refers To ClaimParticipant
ClaimPaymentSummaryId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Claim Payment Summary issued to the Claim Participant Recipient for the Claim Coverage Payment Detail. This field is a relationship field. Relationship Name ClaimPaymentSummary Relationship Type Lookup Refers To ClaimPaymentSummary
ClaimPayoutPlanId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Claim Payout Plan associated with the Claim Coverage Payment Detail. This field is a relationship field. Relationship Name ClaimPayoutPlan Relationship Type Lookup Refers To ClaimPayoutPlan
ClaimedAmount	Type currency Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The amount claimed by the claimant or service provider to pay for a loss or benefit.
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar The default value is USD.
Description	Type textarea Properties Create, Nillable, Update Description The description of the claim coverage.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.

Field	Details
LimitUnitCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The unit count that the payment detail represents.
LimitUnitOfMeasure	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the unit of measure that the payment detail represents. Possible values are: • Days • Visits
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the claim coverage payment detail.
PaymentRequestLineId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Payment Request Line associated with the Claim Coverage Payment Detail. This field is a relationship field. Relationship Name PaymentRequestLine Relationship Type Lookup Refers To PaymentRequestLine
ScheduledPaymentDate	Type dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The date on which the payment is scheduled.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of claim coverage payment detail. Possible values are: • Authority Approved • Authority Denied • Cancelled • Closed W/O Pay • New • Open • Paid • Payment Pending • Pending Authority • Stopped
Type	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of claim coverage payment detail. Possible values are: • Expense • Loss

ClaimCovPaymentAdjustment

Represents the amount increased or decreased on a claim coverage payment as adjustments such as deductibles, copays, or coinsurance when applied on a claimed amount. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AdjustedAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount after adjustments are made in account for deductibles, copay, or coinsurance.
AdjustmentReason	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reason for the claim coverage payment detail adjustment such as deductible, copay, or coinsurance.
ClaimCoveragePaymentDetailId	Type reference Properties Create, Filter, Group, Sort, Update Description The Claim Coverage Payment Detail associated with the Claim Coverage Payment Adjustment. This field is a relationship field. Relationship Name ClaimCoveragePaymentDetail Relationship Type Lookup Refers To ClaimCoveragePaymentDetail
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar The default value is USD.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the claim coverage payment adjustment.

ClaimCovReserveAdjustment

Represents the amount adjusted on a claim coverage reserve as the reserve is changed and payments are made. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AdjustmentAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount after adjustments are made in account for deductibles, copay, or coinsurance.
AdjustmentReason	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reason for the claim coverage reserve adjustment.
ClaimCoverageId	Type reference Properties Create, Filter, Group, Sort, Update Description The Claim Coverage associated with the Claim Coverage Reserve Adjustment. This field is a relationship field. Relationship Name ClaimCoverage Relationship Type Lookup Refers To ClaimCoverage
ClaimCoverageReserveDetailId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Claim Coverage Reserve Detail associated with the Claim Coverage Reserve Adjustment.

Field	Details
	This field is a relationship field. Relationship Name ClaimCoverageReserveDetail Relationship Type Lookup Refers To ClaimCoverageReserveDetail
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar The default value is USD.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description The name of the claim coverage reserve adjustment.

ClaimFinancialSettings

Represents the configuration settings for Insurance Claim Financial Services. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
ClaimCovPendingAuthStatus	Type string
	Properties Create, Filter, Group, Sort, Update
	Description The status of pending financial authority for claim coverage.
ClaimPendingAuthorityStatus	Type string
	Properties Create, Filter, Group, Sort, Update
	Description The status of pending financial authority for claim.
ClmCovPymtDtlPendAuthSts	Type string
	Properties Create, Filter, Group, Sort, Update
	Description The status of pending financial authority for claim coverage payment detail.
DeveloperName	Type string

Field	Details
	Properties Create, Filter, Group, Sort, Update Description The unique name for the claim financial settings object.
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language of the claim financial settings.
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description The unique label that identifies the claim financial settings throughout the Salesforce user interface.
NamespacePrefix	Type string Properties Filter, Group, Nillable, Sort Description Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

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 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

Field	Details
	Description The description of the claim item.
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.

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, 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

Field	Details
	Description The roles that the claim participant can have in the claim. For example, witness, victim, defendant, claimant.
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.

ClaimPayoutPlan

Represents the payout plan details for a claim, such as payment frequency, duration, and payouts. This object is available in API version 56.0 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 Description The claim associated with the claim payout plan. This field is a relationship field. Relationship Name Claim Relationship Type Lookup Refers To Claim
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar The default value is USD.
EndDate	Type date Properties Create, Filter, Group, Sort, Update Description The date the claim payout plan ends.
LastReferencedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the claim payout plan.
PaymentFrequency	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the frequency of the payment if the coverage entails a recurring payout to the insured. Possible values are: • Bi-Weekly • Monthly • Weekly • Yearly
PlannedPaymentAmount	Type currency Properties Create, Filter, Sort, Update Description The amount paid to the party at each payout.

Field	Details
PreviousClaimPayoutPlanId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The previous payout plan associated with the claim payout plan. This field is a relationship field. Relationship Name PreviousClaimPayoutPlan Relationship Type Lookup Refers To ClaimPayoutPlan
StartDate	Type date Properties Create, Filter, Group, Sort, Update Description The date the claim payout plan starts.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ClaimPayoutPlanFeed](#) on page 574

Feed tracking is available for the object.

[ClaimPayoutPlanHistory](#) on page 581

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
CancellationDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date on which claim payment was canceled.
ClaimId	Type reference Properties Create, Filter, Group, Sort, Update 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

Field	Details
	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 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

ClaimRecovery

Represents a recovery of funds on an insurance claim through subrogation and salvage activities. Recovered amounts can come from a salvage company or through legal litigation or arbitration. Master-detail child object of Claim. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

This object is available if the add-on license for Claims Management is enabled.

Fields

Field	Details
ClaimCoverageId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The claim coverage associated with the claim recovery. This is a relationship field. Relationship Name ClaimCoverage Relationship Type Lookup Refers To ClaimCoverage
ClaimId	Type reference Properties Create, Filter, Group, Sort, Update Description The claim associated with the claim recovery. This is a relationship field. Relationship Name Claim Relationship Type Lookup Refers To Claim
EstimatedAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The estimated amount the insurance carrier identified to pursue for the claim recovery.

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 Claim Recovery record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
RecoveredAmount	Type currency Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The actual amount the insurance carrier recovered.
RecoveredOnDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The timestamp the amount was recovered. For multi-currency scenarios, the recovery date is used to retrieve currency conversion rates.
RecoveryFromAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account that the claim is recovered from. This is a relationship field. Relationship Name RecoveryFromAccount Relationship Type Lookup Refers To Account
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Status of the claim recovery. Possible values are: - Accepted Recovery - Accepted with Additional Pursuit - Additional Recovery Pursued - Disputed Recovery - Estimated - Partially Recovered - Pursued - Recovery Canceled

Field	Details
	- Recovery Written Off - Referred to Other Department
Type	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Type of claim recovery. Possible values include: - Salvage - Subrogation

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ClaimRecoveryFeed](#) on page 574

Feed tracking is available for the object.

[ClaimRecoveryHistory](#) on page 581

History is available for tracked fields of the object.

[ClaimRecoveryOwnerSharingRule](#) on page 585

Sharing rules are available for the object.

[ClaimRecoveryShare](#) on page 588

Sharing is available for the object.

ClaimTeamMember

Represents a user who is a part of the claim team. This object is available in API version 55.0 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 Description The claim associated with the claim team member. This is a relationship field. Relationship Name Claim Relationship Type Lookup Refers To Claim
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the claim team member record.
Role	Type multipicklist

Field	Details
	Properties Create, Filter, Update Description The role of the claim team member. Possible values are: • Claim Admin • Claim Owner • Claim Supervisor • Special Investigative Unit
UserId	Type reference Properties Create, Filter, Group, Sort, Update Description The user associated with the claim as a claim team member. This is a relationship field. Relationship Name User Relationship Type Lookup Refers To User

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ClaimTeamMemberFeed](#) on page 574

Feed tracking is available for the object.

[ClaimTeamMemberHistory](#) on page 581

History is available for tracked fields of the object.

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 <code>Contact.Birthdate</code>.
AgeAsText__c	Type string Properties Filter, Nillable, Sort Description Age expressed in years, months, and days. Calculated from <code>Contact.Birthdate</code>. 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: <code>Account.BillingStreet</code>, <code>Account.BillingCity</code>, <code>Account.BillingState</code>, <code>Account.BillingPostalCode</code>, and <code>Account.BillingCountry</code>.

Field Name	Details
Citizenship__c	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Citizenship.
CommunicationPreferences__c	Type multipicklist Properties Create, Filter, Nillable, Update Description Preferred communication channel. Valid values: • Balance Activities:Email • Balance Activities:Phone • Balance Activities:SMS • Fraud:Email • Fraud:Phone • Fraud:SMS • Promotions:Email • Promotions:Phone • Promotions:SMS
ContactPreference__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Preferred communication method. Valid values: • Email • Mobile • Phone
CountryOfBirth__c	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description This individual's country of birth.

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
CountryOfResidence__c	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Country of primary residence.
CreatedFromLead__c	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this individual was created from a converted lead (<code>true</code>) or not (<code>false</code>).
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.

Field Name	Details
	Valid values:
	• Africa/Cairo • Africa/Johannesburg • Africa/Nairobi • America/Anchorage • America/Bogota • America/Buenos_Aires • America/Caracas • America/Chicago • America/Denver • America/El_Salvador • America/Halifax • America/Indianapolis • America/Lima • America/Los_Angeles • America/Mexico_City • America/New_York • America/Panama • America/Phoenix • America/Puerto_Rico • America/Santiago • America/Sao_Paulo • America/St_Johns • America/Tijuana • Asia/Baghdad • Asia/Bangkok • Asia/Calcutta • Asia/Colombo • Asia/Dacca • Asia/Dubai • Asia/Hong_Kong • Asia/Jakarta • Asia/Jerusalem • Asia/Kabul • Asia/Kamchatka • Asia/Karachi • Asia/Katmandu • Asia/Kuala_Lumpur

Field Name	Details
	• Asia/Kuwait • Asia/Manila • Asia Rangoon • Asia/Riyadh • Asia/Saigon • Asia/Seoul • Asia/Shanghai • Asia/Singapore • Asia/Taipei • Asia/Tashkent • Asia/Tbilisi • Asia/Tehran • Asia/Tokyo • Asia/Yekaterinburg • Atlantic/Bermuda • Atlantic/Cape_Verde • Atlantic/South_Georgia • Australia/Adelaide • Australia/Brisbane • Australia/Darwin • Australia/Lord_Howe • Australia/Perth • Australia/Sydney • Europe/Amsterdam • Europe/Athens • Europe/Berlin • Europe/Bucharest • Europe/Brussels • Europe/Dublin • Europe/Helsinki • Europe/Istanbul • Europe/Lisbon • Europe/London • Europe/Minsk • Europe/Moscow • Europe/Paris • Europe/Prague • Europe/Rome

Field Name	Details
	• 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 Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates that the individual's email address has been verified (<code>true</code>), or not (<code>false</code>).
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 (<code>true</code>), or not (<code>false</code>).

Field Name	Details
Gender__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Gender. Valid values: • Female • Male • Decline to Specify • Other
HomeOwnership__c	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist Sort, Update Description Relationship to primary residence. Valid values: • Rent • Own • Other
HomePhoneVerified__c	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates that the home phone number has been verified (<code>true</code>), or not (<code>false</code>).
IndividualId__c	Type string Properties Filter, Nillable, Sort Description Unique ID that relates this individual's contact record to its account record. Calculated from <code>Account.IndividualId__c</code>.
IndividualType__c	Type picklist

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Type of individual. Valid values: Individual
LanguagesSpoken__c	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Languages spoken.
LastFourDigitSSN__c	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Last four digits of the individual's Social Security number. This field is encrypted.
LinkedIn__c	Type url Properties Create, Filter, Group, Nillable, Sort, Update Description LinkedIn profile URL.
MailingAddress__c	Type string Properties Filter, Nillable, Sort 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

Field Name	Details
	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. (<code>true</code>) or not (<code>false</code>).
MobileVerified__c	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates the mobile phone number has been verified (<code>true</code>), or not (<code>false</code>).
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

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

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

Field Name	Details
PrimaryAddressIsShipping__c	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the shipping address is the primary address (<code>true</code>) or not (<code>false</code>).
PrimaryCitizenship__c	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Country of primary citizenship. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba • Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin • Bermuda

Field Name	Details
	• 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 • Curaçao • Cyprus • Czech Republic • Denmark • Djibouti • Dominica

Field Name	Details
	• 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 • Heard Island and McDonald Islands • Holy See (Vatican City State) • Honduras • Hungary • Iceland • India

Field Name	Details
	- 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 - Maldives - Mali - Malta - Martinique - Mauritania - Mauritius

Field Name	Details
	• 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 • Portugal • Qatar • Reunion • Romania • Russian Federation • Rwanda

Field Name	Details
	• 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 • Syrian Arab Republic • Taiwan • Tajikistan • Tanzania, United Republic of • Thailand • Timor-Leste

Field Name	Details
	• Togo • Tokelau • Tonga • Trinidad and Tobago • Tunisia • Turkey • Turkmenistan • Turks and Caicos Islands • Tuvalu • Uganda • Ukraine • United Arab Emirates • United Kingdom • United States • Uruguay • Uzbekistan • Vanuatu • Venezuela, Bolivarian Republic of • Vietnam • Virgin Islands, British • Wallis and Futuna • Western Sahara • Yemen • Zambia • Zimbabwe
PrimaryLanguage__c	Type picklist 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

Field Name	Details
	• 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 • Finnish • French • Galician • Georgian • German • Greek, Modern

Field Name	Details
	• Greenlandic • Haitian Creole • Hawaiian • Hebrew • Hindi • Hungarian • Icelandic • Indonesian • Inuktitut • Irish (Gaelic) • Italian • Japanese • Javanese • Kabardian • Kalasha • Kannada • Kashubian • Khmer • Kinyarwanda • Korean • Kurdish/Kurdi • Ladin • Latgalian • Latin • Lingala • Livonian • Lojban • Low German • Lower Sorbian • Macedonian • Malay • Malayalam • Mandarin • Manx • Maori • Mauritian Creole • Min Nan • Mongolian

Field Name	Details
	• 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 • Ukrainian • Upper Sorbian • Urdu • Uzbek • Venetian • Vietnamese

Field Name	Details
	• Vilamovian • Vörrö • Welsh • Xhosa • Yiddish • Zazaki
ReferredByContact__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description External contact referring this individual.
ReferredByUser__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Internal Salesforce user who made the referral.
ReferrerScore__c	Type double Properties Create, Filter, Nillable, Sort, Update Description A value of 0 to 100. A high score reflects a high rate of referral conversion.
SecondaryCitizenship__c	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Country of secondary citizenship. Valid values: • Afghanistan • Åland Islands • Albania • Algeria • Andorra

Field Name	Details
	• 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 • Cameroon • Canada • Cape Verde • Cayman Islands • Central African Republic • Chad

Field Name	Details
	• 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 • French Guiana • French Polynesia • French Southern Territories • Gabon • Gambia • Georgia

Field Name	Details
	• 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 • Kiribati • Korea, Democratic People's Republic of • Korea, Republic of • Kuwait • Kyrgyzstan • Lao People's Democratic Republic

Field Name	Details
	• 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 • Netherlands • New Caledonia • New Zealand • Nicaragua • Niger • Nigeria

Field Name	Details
	• 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 • Seychelles • Sierra Leone • Singapore • Sint Maarten (Dutch part) • Slovakia • Slovenia

Field Name	Details
	• 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 • United States • Uruguay • Uzbekistan • Vanuatu • Venezuela, Bolivarian Republic of • Vietnam

Field Name	Details
	• Virgin Islands, British • Wallis and Futuna • Western Sahara • Yemen • Zambia • Zimbabwe
SecondaryLanguage__c	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description This individual's secondary language. Valid values: • Abkhaz • Adyghe • Afrikaans • Akan • Albanian • American Sign Language • Amharic • Arabic • Aragonese • Aramaic • Armenian • Aymara • Balinese • Basque • Betawi • Bosnian • Breton • Bulgarian • Cantonese • Catalan • Cherokee • Chickasaw • Chinese • Coptic • Cornish

Field Name	Details
	• 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 • Kabardian • Kalasha • Kannada • Kashubian • Khmer • Kinyarwanda

Field Name	Details
	• Korean • Kurdish/Kurdi • 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 • Scots • Scottish Gaelic • Serbian • Serbo-Croatian • Sinhalese • Slovak

Field Name	Details
	• Slovene • Spanish • Swahili • Swedish • Tagalog • Tajik • Tamil • Tarantino • Telugu • Thai • Tok Pisin • Turkish • Twi • Ukrainian • Upper Sorbian • Urdu • Uzbek • Venetian • Vietnamese • Vilamovian • Võro • 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

Field Name	Details
	Description ID that uniquely identifies this individual in an external data source.
TaxBracket__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Rate at which this individual is taxed. Valid values: • 10% • 15% • 25% • 28% • 33% • 35%
TaxId__c	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Tax Identification Number or Social Security number.
Twitter__c	Type url Properties Create, Filter, Group, Nillable, Sort, Update Description Twitter profile URL.
WeddingAnniversary__c	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Date of wedding anniversary.

ContactContactRelation

Represents the relationship between any two individuals.

Supported Calls

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

Fields

Field	Details
Active__c	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the relationship is active (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.
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.

Field	Details
InverseRelationship__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Uniquely identifies the relationship between <code>Contact</code> and <code>RelatedContact__c</code> 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 <code>Contact Relation Name</code>.
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 <code>Contact__c</code> is related to.
Role__c	Type reference Properties Create, Filter, Group, Sort, Update Description Role that describes how <code>RelatedContact__c</code> is related to <code>Contact__c</code>
SourceSystemId__c	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	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.

ContractGroupPlan

Represents a set of plans as part of the contract between the insurance carrier and the group. This set of plans corresponds to the plans included in the quote (as Quote Line Items). Child object of Contract. This object is available in API version 55.0 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 group account associated with the contract group plan. This is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
ContractGroupParentPlanId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The contract group parent plan associated with the contract group plan. This is a relationship field. Relationship Name ContractGroupParentPlan Relationship Type Lookup Refers To ContractGroupPlan
ContractId	Type reference Properties Create, Filter, Group, Sort Description The contract associated with the contract group plan. This is a relationship field. Relationship Name Contract Relationship Type Lookup Refers To Contract
EffectiveEndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The effective end date of the plan line item.
EffectiveStartDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The effective start date of the plan line item.

Field	Details
EligibilityCriteria	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The eligibility criteria for the contract group plan.
EnrollmentEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when enrollment ends for the plans in the contract.
EnrollmentRatingType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the enrollment rating type. Possible values are: • Composite • Rate
EnrollmentStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when enrollment starts for the plans in the insurance contract.
EnrollmentWaitingPeriod	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The waiting period in days after joining date before enrollment can begin.
GroupNumber	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The group number associated with the group account. Required for the enrollment process.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the contract group plan.
OriginalContractPlanId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The original contract plan associated with the contract group plan. This is a relationship field. Relationship Name OriginalContractPlan Relationship Type Lookup Refers To ContractGroupPlan

Field	Details
PricingStructure	Type textarea Properties Create, Nillable, Update Description The structure of pricing based on the rate band tiers.
ProductNumber	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The product number associated with a contract group plan.
QuoteLineItemId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The quote line item associated with the contract group plan. This is a relationship field. Relationship Name QuoteLineItem Relationship Type Lookup Refers To QuoteLineItem
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The status of the group contract plan. Possible values are: • Active • Inactive
UnitPrice	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The price of the contract group plan.
UsageType	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort Description Internal field. Specifies the application using the group census to populate data. For example, Insurance or Loyalty. Possible values are: • Insurance The default value is 'Insurance'.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ContractGroupPlanFeed](#) on page 574

Feed tracking is available for the object.

[ContractGroupPlanHistory](#) on page 581

History is available for tracked fields of the object.

ContractGroupPlanGroupClass

Represents the association of a Contract Group Plan to a Group Class. Use this entity to define group classes and group class contributions at the contract group plan level. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
ContractGroupPlanId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Contract Group Plan associated with the Contract Group Plan Group Class. This field is a relationship field. Relationship Name ContractGroupPlan Relationship Type Lookup Refers To ContractGroupPlan
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar The default value is USD.
GroupClassId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Group Class associated with the Contract Group Plan Group Class. This field is a relationship field. Relationship Name GroupClass

Field	Details
	Relationship Type Lookup Refers To GroupClass
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the contract group plan group class.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The Owner associated with the Contract Group Plan Group Class. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[ContractGroupPlanGroupClassFeed](#) on page 574

Feed tracking is available for the object.

[ContractGroupPlanGroupClassHistory](#) on page 581

History is available for tracked fields of the object.

[ContractGroupPlanGroupClassOwnerSharingRule](#) on page 585

Sharing rules are available for the object.

[ContractGroupPlanGroupClassShare](#) on page 588

Sharing is available for the object.

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

Field	Details
	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.
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.

Field	Details
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 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

Field	Details
	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 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.

Field	Details
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 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

Field	Details
	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

Field	Details
	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 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.

Field	Details
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.
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

Field	Details
	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 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

Field	Details
	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 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

Field	Details
	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 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.

Field	Details
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.
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

Field	Details
	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 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

Field	Details
	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 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

Field	Details
	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 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.

CustomObjectParticipant

Represents information about a participant in the context of a custom object record. This object is available in API version 55.0 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 The additional information about the 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.

Field	Details
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who created the record. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParticipantId	Type reference Properties Create, Filter, Group, Sort Description The user or group associated with this participant. This field is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Group, User
ParticipantRoleId	Type reference Properties Create, Filter, Group, Sort, Update Description The role associated with the participant.

Field	Details
	This field is a relationship field. Relationship Name ParticipantRole Relationship Type Lookup Refers To ParticipantRole
ReferenceObjectId	Type reference Properties Create, Filter, Group, Nillable, Sort Description The parent custom object record that's related to this participant record. This field is a polymorphic relationship field. Relationship Name ReferenceObject Relationship Type Lookup Refers To FSC12__AccountAccountRelation__c, FSC12__Alert__c, FSC12__AssetsAndLiabilities__c, FSC12__B2CLeadCompanyNameConfig__c, FSC12__BillingStatement__c, FSC12__Card__c, FSC12__ChargesAndFees__c, FSC12__ContactContactRelation__c, FSC12__Education__c, FSC12__Employment__c, FSC12__FinancialAccountRole__c, FSC12__FinancialAccountTransaction__c, FSC12__FinancialAccount__c, FSC12__FinancialGoal__c, FSC12__FinancialHolding__c, FSC12__IdentificationDocument__c, FSC12__IndustriesAppConfig__c, FSC12__IndustriesSettings__c, FSC12__LifeEvent__c, FSC12__NextLastInteractionSettings__c, FSC12__PolicyPaymentMethod__c, FSC12__QueryOptimization__c, FSC12__ReciprocalRole__c, FSC12__Record_Rollup_Configuration__c, FSC12__Record_Rollup_and_Trigger_Configuration__c, FSC12__Revenue__c, FSC12__RollupByLookupConfig__c, FSC12__RollupByLookupFilterCriteria__c, FSC12__Securities__c, FSC12__UsePersonAccount__c, FSC12__WealthAppConfig__c, FSC12__individualExcludedFields__c, vlocity_lwc27__CardFrameworkConfiguration__c, vlocity_lwc27__DRBatchQueue__c, vlocity_lwc27__DRBulkData__c, vlocity_lwc27__DREncryption__c, vlocity_lwc27__DRWorker__c, vlocity_lwc27__Interface_DRGeneric__c, vlocity_lwc27__TestResult__c, vlocity_lwc27__TriggerSetup__c, vlocity_lwc27__UISettings__c, vlocity_lwc27__VlocityDataPack__c, vlocity_lwc27__VlocityDocuSignTemplate__c, vlocity_lwc27__VlocityErrorLogEntry__c, vlocity_lwc27__VlocityScheduledJob__c, vlocity_lwc27__VlocityTrackingEntry__c

DataUsePurpose

Represents the reason for contacting a prospect or customer, such as for billing, marketing, or surveys. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this field is active (<code>true</code>) or not (<code>false</code>). Once active, you can create an authorization request for this purpose. The default value is <code>false</code>.
IsReadOnly	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this record can be editable (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[DataUsePurposeHistory](#) on page 581

History is available for tracked fields of the object.

[DataUsePurposeShare](#) on page 588

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.

Field	Details
ExpirationDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date on which this authorization expires.
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

Field	Details
	Description An auto-number identifier for this distributor authorization.
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 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

Field	Details
	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 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.

Field	Details
ParentRecordId	Type master-detail reference Properties Create, Filter, Group, Sort, Update Description Original parent object the document checklist item belonged to.
Status	Type picklist 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 <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down while Salesforce generates one for each record.
IsActive	Type boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the document type is active.
Language	Type picklist 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.
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's 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 Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.

Education

Represents an individual's educational background.

Supported Calls

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

Fields

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

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

Employment

Represents information about an individual's employment history.

Supported Calls

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

Fields

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

Field	Details
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 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:

Field	Details
	• 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 • 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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Date the individual began working for current employer.

Event Custom Fields

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

Fields

Field Name	Details
Expectations__c	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Client expectations that this event relates to.
Household__c	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description ID of the household associated with the client.
NextSteps__c	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Next steps for this client event.
Objectives__c	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Client objectives that this event relates to.

Field Name	Details
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
AccrualFrequency__c	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The frequency the interest is accrued on the financial account. Possible values are: • Annual • Daily • Monthly • Quarterly The default value is <code>Daily</code>.

Field	Details
AccruedInterest__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description The interest accrued on the financial account in the current statement period.
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

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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The branch code of the financial account.
BranchName__c	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The branch name of the financial 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 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

Field	Details
	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 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.

Field	Details
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 (<code>true</code>) or not (<code>false</code>).
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.
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

Field	Details
	Description ID that uniquely identifies the financial account in an external data source. Label is <code>Account Number</code> .
<code>FinancialAccountSource__c</code>	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Data source. Label is <code>Source</code> . Valid values: - Integrator - Manual Entry - Pending
<code>FinancialAccountType__c</code>	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Type of financial account. Label is <code>Type</code> . Valid values: 401(a) 401(k) 403(b) 529 Plan - Brokerage - Cash Management Account - CD - Checking - Credit Card - Discount Brokerage - Fixed Annuity - Individual Life - IRA - Mutual Fund - Profit Sharing - Rollover IRA - Roth IRA - Savings - Term Life

Field	Details
	- 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 (<code>true</code>) or in-house (<code>false</code>).
HoldingCount__c	Type double Properties Filter, Nillable, Sort Description Number of holdings within this financial account. Calculated by roll-up summary. Label is <code>Number of Holdings</code>.
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.
InsurancePaidYearToDate__c	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The total amount of insurance paid in the current tax year.
InsuredAmount__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description The insured value that an insurance policy covers.
InterestBalance__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description The interest balance on the financial account.
InterestPaidYearToDate__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total amount of interest paid in the current tax year.
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 (<code>true</code>), or not (<code>false</code>).
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 (<code>true</code>) or not (<code>false</code>).
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 (<code>true</code>) or not (<code>false</code>).
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.
PrimaryBankerIdentifier__c	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The unique identifier of the primary banker who manages the financial account.
PrimaryBankerName__c	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the primary banker who manages the financial account.
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.
PrincipalPaidYearToDate__c	Type currency Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The total amount paid against the principal in the current tax year.
ProductName__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Policy product name.
PropTaxPaidYearToDate__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total amount of property tax paid in the current tax year.
RebalanceFrequency__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Frequency of portfolio rebalancing for this financial account. Valid values: - Monthly - Quarterly - Semiannually - Annually
RecordTypeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description ID of the record type associated with this financial account.
RecordTypeName__c	Type string Properties Filter, Nillable, Sort

Field	Details
	Description Record type for this financial account. The value is copied from <code>RecordType.Name</code> and can't be changed. Label is <code>Record Type</code> .
<code>RenewalDate__c</code>	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Date when insurance policy renewal is due.
<code>RepaymentPeriodMonths__c</code>	Type double Properties CreateFilter, Nillable, SortUpdate Description Repayment period in months.
<code>RoutingNumber__c</code>	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Bank routing number.
<code>SecondaryBankerIdentifier__c</code>	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The unique identifier of the secondary banker who manages the financial account.
<code>SecondaryBankerName__c</code>	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the secondary banker who manages the financial account.
<code>ServiceProvider__c</code>	Type string

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

Field	Details
	Description Status of this financial account. Valid values: • 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
TermDepositMaturityDate__c	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date a fixed term deposit matures.
TimeHorizon__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Investment time frame for this financial account. Valid values: - Long Term - Medium Term - Short Term
TotalCreditLimit__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description Total credit limit.
TotalHoldAmountAsOfDate__c	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date the total hold amount is relevant.
TotalHoldAmount__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total hold amount on the financial account.
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

Field	Details
	• 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 (<code>true</code>) or not (<code>false</code>).
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

Field	Details
	Description Indicates whether this field is editable (<code>true</code>) or not (<code>false</code>).
EndDate__c	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description End date when the organizational entity or person relinquished this role.
FinancialAccount__c	Type reference Properties Create, Filter, Group, Sort Description Financial account that this role is related to.
Name	Type string Properties Defaulted on create, Filter, idLookup, Sort Description Name of the financial account role.
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

Field	Details
	Description Name of the person who is involved with the financial account.
Role__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Role that describes how the organizational entity or person is involved with the financial account. Valid values: When the record type is set to Account Role: • Corporation • Foundation When the record type is set to Contact Role: • Trustee • Beneficiary • Grantor • Accountant • Business Manager
SourceSystemId__c	Type string 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
<code>AllocatedEscrowPayment__c</code>	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of the payment that's allocated towards escrow.
<code>AllocatedFeeAmount__c</code>	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of the payment that's allocated towards fees.
<code>AllocatedInterestAmount__c</code>	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of the payment that's allocated towards the interest.
<code>AllocatedPrincipalAmount__c</code>	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount of the payment that's allocated towards the principal.
<code>Amount__c</code>	Type currency Properties Create, Filter, Sort, Update Description Amount of the transaction.

Field	Details
BillingStatement__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update 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.
DisputeReason__c	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Reason for the dispute. Possible values are: • Duplicate Transactions • Others • Suspected Fraud • Transaction not recognized

Field	Details
EscrowBalance__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description The balance on the escrow amount of the financial account.
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 Description Merchant category code.
PostDate__c	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description Date the transaction posted to the account.
PrincipalBalance__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description The balance on the principal amount of the financial account.

Field	Details
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 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.

Field	Details
	- Pending - Posted
TransactionType__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Type of transaction. - Credit - Debit

FinancialDeal

Represents the deal that the financial institution is working on. This object is available in API version 52.0 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 account ID of the customer who engaged the financial institution in this deal. This is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account

Field	Details
CloseProbability	Type percent Properties Create, Filter, Nillable, Sort, Update Description The probability of the deal being successfully closed.
ConfidentialityType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the level of confidentiality of the information that's recorded in the financial deal. Possible values are: - Confidential - Public
ConflictStatus	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the conflict clearance for the financial deal. Possible values are: - Approved - Declined
Description	Type textarea Properties Create, Nillable, Update Description The description of the deal.
ExpectedCloseDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when the deal is expected to close.

Field	Details
FinancialDealCode	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description A unique code that identifies the deal.
FinancialDealType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The type of the deal. Possible values are: • Advisory • Capital Raising • Debt Capital Market • Initial Public Offering • Mergers and Acquisitions • Secondary Offering
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.
MandatedDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date when the financial deal was mandated.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the financial deal.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who created the relationship record. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentFinancialDealId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The parent financial deal. This is a relationship field. Relationship Name ParentFinancialDeal Relationship Type Lookup Refers To FinancialDeal
ReceivedFee	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The total fee received by the financial institution until the current date.
Role	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The role that the financial institution plays in this deal. Possible values are: • Advisor • Bookrunner • Syndication Agent
Stage	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the stage of the deal. Possible values are: • Closed • Execution • Mandate • Pitch
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the deal. Possible values are: • Closed • On Hold • Open

Field	Details
TotalExpectedFee	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total fee expected by the financial institution until the current date.
TotalExpense	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total expense incurred for the financial deal until the current date.
TransactionValue	Type currency Properties Create, Filter, Nillable, Sort, Update Description The total transaction value of the financial deal.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[FinancialDealFeed](#) on page 574

Feed tracking is available for the object.

[FinancialDealHistory](#) on page 581

History is available for tracked fields of the object.

[FinancialDealOwnerSharingRule](#) on page 585

Sharing rules are available for the object.

[FinancialDealShare](#) on page 588

Sharing is available for the object.

FinancialDealAsset

Represents the assets included in the financial deal. This object is available in API version 54.0 and later.

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 asset. 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.
AssetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The asset involved in the financial deal. This is a relationship field. Relationship Name Asset Relationship Type Lookup Refers To Asset
AssetType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the type of asset. Possible values are: • Office Space • Residential Space

Field	Details
FinancialDealId	Type reference Properties Create, Filter, Group, Sort, Update Description The financial deal associated with the financial deal asset record. This is a relationship field. Relationship Name FinancialDeal Relationship Type Lookup Refers To FinancialDeal
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 financial deal asset record.
UnitCount	Type double Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The total number of units.
UnitOfMeasureId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The unit of measure for the asset. This is a relationship field.
	Relationship Name UnitOfMeasure
	Relationship Type Lookup
	Refers To UnitOfMeasure

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[FinancialDealAssetFeed](#) on page 574

Feed tracking is available for the object.

[FinancialDealAssetHistory](#) on page 581

History is available for tracked fields of the object.

FinancialDealBid

Represents the bids placed by financial deal parties in the financial deal. This object is available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
BidAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount that the financial deal party is willing to pay for the bid.
BidDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date on which the bid has been placed by the financial deal party.
BidRound	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The bidding round in which the bid has been placed by the financial deal party.
FinancialDealId	Type reference Properties Create, Filter, Group, Sort, Update Description The financial deal associated with the financial deal bid record. This is a relationship field. Relationship Name FinancialDeal Relationship Type Lookup Refers To FinancialDeal
FinancialDealPartyId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The financial deal party who's making the bid. This is a relationship field. Relationship Name FinancialDealParty Relationship Type Lookup Refers To FinancialDealParty
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 financial deal bid record.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[FinancialDealBidFeed](#) on page 574

Feed tracking is available for the object.

[FinancialDealBidHistory](#) on page 581

History is available for tracked fields of the object.

FinancialDealInteraction

Represents a junction between an interaction and a financial deal. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
Comment	Type textarea Properties Create, Nillable, Update Description Notes about the financial deal associated with the interaction.
FinancialDealId	Type reference Properties Create, Filter, Group, Sort Description The financial deal associated with the interaction. This is a relationship field. Relationship Name FinancialDeal Relationship Type Lookup Refers To FinancialDeal
InteractionId	Type reference Properties Create, Filter, Group, Sort, Update Description The interaction associated with the financial deal interaction record. This is a relationship field. Relationship Name Interaction

Field	Details
	Relationship Type Lookup
	Refers To Interaction
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 financial deal interaction record.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[FinancialDealInteractionFeed](#) on page 574

Feed tracking is available for the object.

[FinancialDealInteractionHistory](#) on page 581

History is available for tracked fields of the object.

FinancialDealParty

Represents the parties, such as partners and competitors, that are involved in the deal. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact ID of the party. This is a relationship field. Relationship Name Contact Relationship Type Lookup Refers To Contact
PartyType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The type of the party. Possible values are: • Company • Individual
FinancialDealId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The deal that's shared with the participant. This is a relationship field. Relationship Name FinancialDeal

Field	Details
	Relationship Type Lookup Refers To FinancialDeal
LastReferencedDate	Type dateTime Properties Aggregate, Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastStageChangeDate	Type dateTime Properties Filter, Nillable, Sort Description The date of the last change made to the Stage field on this financial deal party record. This field is available in API version 54.0.
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 party that's involved in the deal.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who created the relationship record.

Field	Details
	This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account ID of the party. This is a relationship field. Relationship Name Party Relationship Type Lookup Refers To Account
PartyRole	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The party's role in the deal. Possible values are: • Competitor • Partner • Syndicate
Stage	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The current stage of the party involved with the financial deal. Possible values are:

Field	Details
	• Confidential Information Memorandum Sent • Declined • Indication of Interest Sent • Letter of Intent Sent • Non-Disclosure Agreement Signed • Teaser Sent

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

FinancialDealPartyFeed on page 574

Feed tracking is available for the object.

FinancialDealPartyHistory on page 581

History is available for tracked fields of the object.

FinancialDealPartyOwnerSharingRule on page 585

Sharing rules are available for the object.

FinancialDealPartyShare on page 588

Sharing is available for the object.

FinancialDealParticipant

Represents the user or the group with whom the deal is shared. This object is available in API version 52.0 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 the deal participant.

Field	Details
FinancialDealId	Type reference Properties Create, Filter, Group, Sort Description The deal that's shared with the participant. This is a relationship field. Relationship Name FinancialDeal Relationship Type Lookup Refers To FinancialDeal
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the deal participant is active. 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, idLookup, Sort

Field	Details
	Description An auto-generated number assigned to this record.
ParticipantId	Type reference Properties Create, Filter, Group, Sort Description The user or group that the deal is shared with. This is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Group, User
ParticipantRoleId	Type reference Properties Create, Filter, Group, Sort, Update Description The role assigned to the participant. This is a relationship field. Relationship Name ParticipantRole Relationship Type Lookup Refers To ParticipantRole

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[FinancialDealParticipantFeed](#) on page 574

Feed tracking is available for the object.

[FinancialDealParticipantHistory](#) on page 581

History is available for tracked fields of the object.

FinancialDealProduct

Represents the products (services) offered by the bank in the deal. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
Fee	Type currency Properties Create, Filter, Nillable, Sort, Update Description The fee charged by the bank for the product
FinancialDealId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The financial deal that the product or service is associated with. This is a relationship field. Relationship Name FinancialDeal Relationship Type Lookup Refers To FinancialDeal
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.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the product (service) provided by the bank.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who created the relationship record. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProductId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The product (service) provided by the bank in the deal. This is a relationship field. Relationship Name Product Relationship Type Lookup Refers To Product2

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

FinancialDealProductFeed on page 574

Feed tracking is available for the object.

FinancialDealProductHistory on page 581

History is available for tracked fields of the object.

FinancialDealProductOwnerSharingRule on page 585

Sharing rules are available for the object.

FinancialDealProductShare on page 588

Sharing is available for the object.

FinancialGoal

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

Supported Calls

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

Fields

Field	Details
ActualValue__c	Type currency Properties Create, Filter, Nillable, Sort, Update Description Current amount saved toward goal.
CompletionDate__c	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Date when the goal was reached.
CurrencyIsoCode	Type picklist

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

Field	Details
	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.
Status__c	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Status of goal. Valid values: - Completed - In Progress

Field	Details
	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 Properties Create, Filter, Group, Nillable, Sort, Update Description Major category of asset type. Valid values:

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

Field	Details
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 Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description ID that uniquely identifies the holding in an external data source.

Field	Details
Symbol__c	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Ticker symbol for the securities held. The value is copied from <code>Securities__c</code> and can't be changed.

FinclDealInteractionSummary

Represents a junction between an interaction summary and a financial deal. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
Comment	Type textarea Properties Create, Nillable, Update Description Notes about the financial deal associated with the interaction summary.
FinancialDealId	Type reference Properties Create, Filter, Group, Sort Description The financial deal associated with the interaction summary. This is a relationship field. Relationship Name FinancialDeal Relationship Type Lookup

Field	Details
	Refers To FinancialDeal
InteractionSummaryId	Type reference Properties Create, Filter, Group, Sort, Update Description The interaction summary associated with the financial deal interaction summary record. This is a relationship field. Relationship Name InteractionSummary Relationship Type Lookup Refers To InteractionSummary
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 financial deal interaction summary record.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[FindDealInteractionSummaryFeed](#) on page 574

Feed tracking is available for the object.

[FindDealInteractionSummaryHistory](#) on page 581

History is available for tracked fields of the object.

GroupCensus

Represents a snapshot of statistics about eligible members (employees or members) of a group (employer or association) and their legal dependents. Use this entity in quoting, rating, and the subsequent enrollment process. Child object of employer or group Account. This object is available in API version 55.0 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 Group account associated with the census. This is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
EffectiveEndDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description Effective end date of the census.
EffectiveStartDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description Effective start date of the census.
ExternalIdentifier	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description External ID used to identify the group census in search. Used as a cross reference field if the group census is externally imported.
FullTimeMemberCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of full-time members.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The most recent date on which a user viewed this record
LeadId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Lead associated with the census. This is a relationship field. Relationship Name Lead Relationship Type Lookup Refers To Lead
MbrWithMoreThan1ChldCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of members who have one or more children as dependents. Use in tier-based rating during quote and contract.
MbrWithMoreThan2ChldCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of members who have two or more children as dependents. Use in tier-based rating during quote and contract.
MbrWithoutDependentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of single members who haven't declared any dependents for plan enrollment.
MemberOptOutCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Number of members who have opted out of plan enrollment and don't want to participate in the employer's benefits program.
MemberWithDependentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of members who have dependents and no spouse.
MemberWithOneChildCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of members who have only one child as a dependent. Use in rating during quote and contract.
MemberWithSpouseCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of members who have a spouse and no dependents.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the census.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the user who currently owns this account. This is a polymorphic relationship field.

Field	Details
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
PartTimeMemberCount	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Number of part-time members.
SourceSystemName	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The source system of the census.
SourceSystemType	Type picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description Specifies the source system type. Possible values are: • External • User
Status	Type picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	Description Specifies the status of the census. Possible values are: • Active • Draft

Field	Details
	Inactive
TotalDependents	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of dependents.
TotalMemberPlusDependent	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of members and dependents.
TotalMembers	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of members.
Type	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the stage this census is mapped to. Possible values are: - Enrollment - Lead - Quote - System
UsageType	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort Description Internal field. Specifies the application using the group census to populate data.

Field	Details
	Possible values are: Insurance The default value is 'Insurance'.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[GroupCensusFeed](#) on page 574

Feed tracking is available for the object.

[GroupCensusHistory](#) on page 581

History is available for tracked fields of the object.

[GroupCensusOwnerSharingRule](#) on page 585

Sharing rules are available for the object.

[GroupCensusShare](#) on page 588

Sharing is available for the object.

GroupCensusMember

Represents personal information about a member, for example employee or association member, or their dependents.

GroupCensusMember is used to estimate the insurance plan cost for the group. This object is also used in the enrollment process to retrieve the member and dependent details. Child object of GroupCensus. This object is available in API version 55.0 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 person account associated with the census member. This is a relationship field.

Field	Details
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
Address	Type address
	Properties Filter, Nillable
	Description The census member's address.
AnnualEligibleSalary	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	Description The census member's annual eligible salary, which is used to determine life insurance coverage.
Birthdate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The census member's birthdate.
City	Type string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The city detail for the address.
ContactId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The contact associated with the census member. This is a relationship field. Relationship Name Contact Relationship Type Lookup Refers To Contact
Country	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The country detail for the address.
DependentCount	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of the census member's dependents. Children, parents, and parents-in-law are included in the number of dependents. Spouse isn't included in the number of dependents.
Email	Type email Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The census member's email address.
FirstName	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The census member's first name.
FullTimeEquivalent	Type double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description Census member's hours divided by the employer's hours for a full-time work week. 1 is equal to full-time hours, 0.5 is 50% of the full-time equivalent.
Gender	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The census member's gender. Possible values are: • Female • Male • Not Listed • Transgender
GeocodeAccuracy	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Accuracy level of the geocode for the address. Possible values are: • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
GroupCensusId	Type reference

Field	Details
	Properties Create, Filter, Group, Sort Description The group census associated with the member. This is a relationship field. Relationship Name GroupCensus Relationship Type Lookup Refers To GroupCensus
GroupClassId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The group class associated with the census member. This is a relationship field. Relationship Name GroupClass Relationship Type Lookup Refers To GroupClass
IsOptOutAllPlans	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the census member has opted out of all plans. Used to calculate OptOutCount for GroupCensus when RelationshipType is 'Self'. The default value is 'false'.
IsPortalUser	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the census member is created as a portal user.

Field	Details
	The default value is 'false'.
JoinDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The census member's hire date.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Lastname	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The census member's last name.
Latitude	Type double Properties Create, Filter, Nillable, Sort, Update Description Used with Longitude to specify the precise geolocation of the address.
Longitude	Type double Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description Used with Latitude to specify the precise geolocation of the address.
MemberKey	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The hash key that's used for identifying duplicate group census member records. By default, the hash key is a combination of First Name, Last Name, and Email ID.
MemberType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Type of member. Possible values are: • Cobra • Declined • Full Time • Part Time
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the census member.
OptOutPlanTypes	Type multipicklist Properties Create, Filter, Nillable, Update Description Specifies the plan types the census member opts out of. Possible values are: • Dental • Life • Medical

Field	Details
	• Medical Savings Account • Retirement • Vision
PhoneNumber	Type phone Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The census member's phone number.
PostalCode	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The postal code for the address.
PrimaryGroupCensusMemberId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The primary group census member associated with the census member. This is a relationship field. Relationship Name PrimaryGroupCensusMember Relationship Type Lookup Refers To GroupCensusMember
PrimaryMemberCategory	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the category of the primary census member. Possible values are: • Employee + Child • Employee + Children

Field	Details
	- Employee + Family - Employee + Spouse - Employee Only
PrimaryMemberSource	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description External identifier of the primary member. Maximum size is 255 characters.
RelationshipToPrimaryMember	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The census member's relationship to the primary member. Possible values are: - Child - Other - Parent - Parent-in-law - Self - Spouse
SmokerStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the smoking status of the user Possible values are: - Non-Tobacco - Tobacco
SourceSystemIdentifier	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description Source System external ID of the group census member.
State	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The state detail for the address.
Status	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the status of the group census member. Possible values are: - Completed - Incompleted - Not Determined
Street	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The street detail for the address.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[GroupCensusMemberFeed](#) on page 574

Feed tracking is available for the object.

[GroupCensusMemberHistory](#) on page 581

History is available for tracked fields of the object.

GroupCensusMemberPlan

Represents the association of GroupCensusMember and ContractGroupPlan. Use this entity when census data includes previous member enrollment plan details and new member plan details. You can populate GroupCensusMemberPlan by reading the enrollment census in the enrollment services before creating insurance policies. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
ContractGroupPlanId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contract group plan associated with the group census member plan. This is a relationship field. Relationship Name ContractGroupPlan Relationship Type Lookup Refers To ContractGroupPlan
GroupCensusMemberId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The group census member associated with the group census member plan. This is a relationship field. Relationship Name GroupCensusMember Relationship Type Lookup Refers To GroupCensusMember

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the group census member plan.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[GroupCensusMemberPlanFeed](#) on page 574

Feed tracking is available for the object.

[GroupCensusMemberPlanHistory](#) on page 581

History is available for tracked fields of the object.

GroupClass

Represents the classification of group members that receive similar benefits. Example classes include executives, union, and office workers. Child object of employer or group Account. This object is available in API version 55.0 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 ID of the related account record. This is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
Category	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The class category the group class belongs to. Possible values are: • Employees • Executives • Managers • Office workers • Union
Code	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description Code for the group class.
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Description of the group class.
EffectiveEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Effective end date of the group class.
EffectiveStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Effective start date of the group class.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the group class.
ParentGroupClassId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The parent group class associated with the group class. This is a relationship field. Relationship Name ParentGroupClass Relationship Type Lookup Refers To GroupClass
UsageType	Type picklist Properties Defaulted on create, Filter, Group, Restricted picklist, Sort Description Internal field. Specifies the application using the group census to populate data. For example, Insurance or Loyalty. Possible values are: • Insurance The default value is 'Insurance'.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[GroupClassHistory](#) on page 581

History is available for tracked fields of the object.

GroupClassContribution

Represents employer or group contributions for GroupClass members and their dependents on a per product category such as medical, dental, or vision. Child object of GroupClass. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
Amount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The employer's contribution currency amount for the corresponding contract plan. If MemberType is Subscriber or not specified, the contribution amount is for the main member. If MemberType is Dependent, the contribution amount is for the dependents.
ContractGroupPlanId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contract group plan associated with the group class contribution. This is a relationship field. Relationship Name ContractGroupPlan Relationship Type Lookup Refers To ContractGroupPlan
EffectiveEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Effective end date of the group class contribution.
EffectiveStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Effective start date of the group class contribution.
GroupBenefitProductCategory	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the group benefit product category. Possible values are: • Dental • Life • Medical • Medical Savings Account • Retirement • Vision
GroupClassId	Type reference Properties Create, Filter, Group, Sort Description The group class associated with the group class contribution. This is a relationship field. Relationship Name GroupClass Relationship Type Lookup Refers To GroupClass
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.

Field	Details
MemberType	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the member type. Possible values are: • <code>Dependent</code> • <code>Subscriber</code>
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the group class contribution.
Percentage	Type percent Properties Create, Filter, Nillable, Sort, Update Description The employer's contribution percentage amount for the corresponding contract plan. If MemberType is Subscriber or not specified, the contribution amount is for the main member. If MemberType is Dependent, the contribution amount is for the dependent.
Type	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Specifies the contribution type. Possible values are: • <code>Amount</code> • <code>Percentage</code>

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

GroupClassContributionHistory on page 581

History is available for tracked fields of the object.

InfoAuthorizationRequest

Tracks a request for authorization on a Data Use Purpose. For example, consent request to share the documents required to open a financial account and share loan rate lock disclosure to the external customer. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
CommunicationType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The medium of which this request was sent. Possible values are: - Email - Mail - Paper - Phone - Web The default value is 'Paper'.
ConsenterId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The external (communities) account who is consenting to this request. This is a polymorphic relationship field. Relationship Name Consenter Relationship Type Lookup

Field	Details
	Refers To Account, Contact, User
DataUsePurposeId	Type reference Properties Create, Filter, Group, Sort, Update Description Reference to the purpose of this request. This is a relationship field. Relationship Name DataUsePurpose Relationship Type Lookup Refers To DataUsePurpose
ExpirationDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The expiration date of this request.
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.
Locale	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The locale of the request (used to find Auth Form Texts that match the locale).
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the info authorization request record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who created the relationship record. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PertainsToId	Type reference Properties Create, Filter, Group, Sort, Update Description The person to whom this request pertains. This is a polymorphic relationship field. Relationship Name PertainsTo Relationship Type Lookup Refers To Account, Contact, User

Field	Details
RequestedDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date time that this request was sent.
RequesterId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The party that initiated the request. This is a polymorphic relationship field. Relationship Name Requester Relationship Type Lookup Refers To Account, Contact, User
ResponseStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The consentee's response to this request. Possible values are: • New • Rejected • Seen • Signed The default value is 'New'.
SourceRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The record from which this consent request is created.

Field	Details
	This is a relationship field.
	Relationship Name SourceRecord
	Relationship Type Lookup
	Refers To Account, BusinessMilestone, Campaign, Case, Claim, ClaimItem, Contact, Contract, DocumentChecklistItem, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, InsurancePolicyCoverage, Lead, Opportunity, OpportunityLineItem, Order, OrderItem, PersonLifeEvent, Quote, QuoteLineItem, ResidentialLoanApplication, Task

InfoAuthRequestForm

Tracks the individual Authorization Form Texts that belong to an Authorization Request. For example, consent on GDPR privacy policy document and consent on mortgage loan rate lock fee document. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
AuthorizationFormTextId	Type reference
	Properties Create, Filter, Group, Sort, Update

Field	Details
	Description A link to the Authorization Form Text to which this request is related. This is a relationship field. Relationship Name AuthorizationFormText Relationship Type Lookup Refers To AuthorizationFormText
InfoAuthorizationRequestId	Type reference Properties Create, Filter, Group, Sort Description The Information Authorization Request to which this record is related. This is a relationship field. Relationship Name InfoAuthorizationRequest Relationship Type Lookup Refers To InfoAuthorizationRequest
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.
LatestAuthFormConsentId	Type reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The most recent response from the consenter. This is a relationship field. Relationship Name LatestAuthFormConsent Relationship Type Lookup Refers To AuthorizationFormConsent
LatestResponseDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The time of the latest response from the consenter.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the info authorization request record.
ResponseStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The response from the latest Authorization Form Consent related to this record. Possible values are: • New • Rejected • Seen • Signed The default value is 'New'.

IdentificationDocument

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

Supported Calls

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

Fields

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

Field	Details
	Description Date the document expires.
IssueDate__c	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Date the document was issued.
IssuingCountry__c	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The country in which the document was issued. Valid values: • Afghanistan • Aland Islands • Albania • Algeria • Andorra • Angola • Anguilla • Antarctica • Antigua and Barbuda • Argentina • Armenia • Aruba • Australia • Austria • Azerbaijan • Bahamas • Bahrain • Bangladesh • Barbados • Belarus • Belgium • Belize • Benin

Field	Details
	• 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 • Curaçao • Cyprus • Czech Republic • Denmark • Djibouti

Field	Details
	• 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 • Heard Island and McDonald Islands • Holy See (Vatican City State) • Honduras • Hungary • Iceland

Field	Details
	• 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 • Maldives • Mali • Malta • Martinique • Mauritania

Field	Details
	• 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 • Portugal • Qatar • Reunion • Romania • Russian Federation

Field	Details
	• 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 • Syrian Arab Republic • Taiwan • Tajikistan • Tanzania, United Republic of • Thailand

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

Field	Details
	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
	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

Field	Details
	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.
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.

Field	Details
PartyProfileId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The party profile associated with this record. This field is a relationship field. Relationship Name PartyProfile Relationship Type Lookup Refers To PartyProfile
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.

InsPolicyTransactionDetail

Represents the details of an insurance policy transaction. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
InsurancePolicyTransactionId	Type reference
	Properties Create, Filter, Group, Sort
	Description The insurance policy transaction associated with the insurance policy transaction detail. This is a relationship field.
	Relationship Name InsurancePolicyTransaction
	Relationship Type Lookup
	Refers To InsurancePolicyTransaction
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the insurance policy transaction detail record.
ReferenceObjectId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The coverage, insured item, or participant record associated with the insurance policy transaction detail. This is a polymorphic relationship field. Relationship Name ReferenceObject Relationship Type Lookup Refers To InsurancePolicyAsset, InsurancePolicyCoverage, InsurancePolicyParticipant

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InsPolicyTransactionDetailFeed](#) on page 574

Feed tracking is available for the object.

[InsPolicyTransactionDetailHistory](#) on page 581

History is available for tracked fields of the object.

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 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, 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.

InsuranceContract

Represents insurance-specific contract information. Extension of Contract object, specifically for the insurance industry. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
BrokerageAgencyId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The brokerage agency associated with the insurance contract. This is a relationship field. Relationship Name BrokerageAgency Relationship Type Lookup Refers To Producer
BusinessLicenseId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description Agency license associated with the insurance contract. This is a relationship field. Relationship Name BusinessLicense Relationship Type Lookup Refers To BusinessLicense
ContractId	Type reference Properties Create, Filter, Group, Sort Description The contract associated with the insurance contract. This is a relationship field. Relationship Name Contract

Field	Details
	Relationship Type Lookup Refers To Contract
EnrollmentCensusId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The enrollment group census associated with the insurance contract used during enrollment. This is a relationship field. Relationship Name EnrollmentCensus Relationship Type Lookup Refers To GroupCensus
EnrollmentEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when enrollment ends for the plans in the insurance contract.
EnrollmentStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date when enrollment starts for the plans in the insurance contract.
EnrollmentWaitingPeriod	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The waiting period in days after joining date before enrollment can begin.

Field	Details
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the insurance contract.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner associated with the insurance contract. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProducerId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The producer or broker associated with the insurance contract. This is a relationship field. Relationship Name Producer Relationship Type Lookup Refers To Producer
UnderwriterId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The underwriter associated with the insurance contract. This is a relationship field. Relationship Name Underwriter Relationship Type Lookup Refers To User

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InsuranceContractFeed](#) on page 574

Feed tracking is available for the object.

[InsuranceContractHistory](#) on page 581

History is available for tracked fields of the object.

[InsuranceContractOwnerSharingRule](#) on page 585

Sharing rules are available for the object.

[InsuranceContractShare](#) on page 588

Sharing is available for 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.
BillingCarrierAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the Billing Carrier Account associated with the Insurance Policy. When the company that sells the policy also writes the policy, then the billing carrier is same as the writing carrier. This field is a relationship field. Relationship Name BillingCarrierAccount Relationship Type Lookup Refers To Account
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

Field	Details
	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.
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.
CurrentDueAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The current amount due for the policy.
DateRenewed	Type dateTime Properties Create, Filter, Nillable, Sort, Update

Field	Details
	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.
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.
FnlChannel	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

Field	Details
	• 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 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.
IntermediaryAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Intermediary Account associated with the Insurance Policy. This field is a relationship field. Relationship Name IntermediaryAccount Relationship Type Lookup Refers To Account
IsActive	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the policy is active. The default value is False.

Field	Details
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.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The insurance policy number.
NameInsuredId	Type reference Properties Create, Filter, Group, Sort, Update

Field	Details
	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 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

Field	Details
	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.
PastDueAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The amount past due for the 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).
PolicyDescription	Type textarea Properties Create, Nillable, Update Description The description of the insurance policy.

Field	Details
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.
PremiumCalculationMethod	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	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 Description The date on which the insurance policy was renewed in the last renewal cycle.

Field	Details
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.
ReferencePolicyNumber	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The reference number of insurance policy that is renewed when the policy term tracking is continued across the multiple policy versions. For example, if a limit is a "Lifetime Limit", then the policy term tracking is tracked across all versions of the policy.
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

Field	Details
	• Web
RenewalDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update 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.

Field	Details
SourceSystemIdentifier	Type string Properties Create, Filter, Group, idLookup, 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 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

Field	Details
	Description The carrier system's substatus code for the insurance policy.
TaxesSurcharges	Type currency Properties Create, Filter, Nillable, Sort, Update 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.

Field	Details
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.
TotalTermFeeAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The current total term fees of all policy versions.
TotalTermPremiumAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The current total term premium of all policy versions.
TotalTermTaxAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description The current total term taxes of all policy versions.
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.

Field	Details
WritingCarrierAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Writing Carrier Account associated with the Insurance Policy. This field is a relationship field. Relationship Name WritingCarrierAccount Relationship Type Lookup Refers To Account

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.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the insurance policy asset is active. 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

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.
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.
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.
RelatedInsurancePolicyAssetId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The related insurance policy asset id associated with the insurance policy asset. This field is available from API version 54.0 and later. This is a relationship field. Relationship Name RelatedInsurancePolicyAsset Relationship Type Lookup

Field	Details
	Refers To InsurancePolicyAsset
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 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.

Field	Details
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.
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

Field	Details
	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 Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the coverage.
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.

Field	Details
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.
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

Field	Details
	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 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.

Field	Details
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 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

Field	Details
	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 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.

Field	Details
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.

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

Field	Details
	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.
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.

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.

[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

Field	Details
	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 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

Field	Details
	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.
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.

Field	Details
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 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.

Field	Details
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 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

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

Field	Details
	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.
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

Field	Details
	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
	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

Field	Details
	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.
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.
Status	Type picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The current status of a policy transaction. Possible values are: • Approved • Pending • Reversed
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 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

Field	Details
	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 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 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

Field	Details
	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.
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.

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.
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 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

Field	Details
	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.
Description	Type textarea

Field	Details
	Properties Create, Nillable, Update Description The description of 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 Properties Filter, Nillable, Sort Description The timestamp for when the current user last viewed a record related to this record.
LastSyncedDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
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.
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.
ReferenceIdentifier	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The unique reference ID of the interaction.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner.
RelatedRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description This is a polymorphic relationship field.

Field	Details
	Relationship Name RelatedRecord Relationship Type Lookup Refers To FinancialDeal, Opportunity
StartTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time that the interaction started.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InteractionFeed](#) on page 574

Feed tracking is available for the object.

[InteractionHistory](#) on page 581

History is available for tracked fields of the object.

[InteractionOwnerSharingRule](#) on page 585

Sharing rules are available for the object.

[InteractionShare](#) on page 588

Sharing is available for the object.

IntegrationProviderAttr

Represents information about the attributes that are used in the definition for an integration provider. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
DataType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the data type of the attribute. Possible values are: • Boolean • Date • DateTime—Date Time • Double • Integer • Percentage • String
DateTimeValue	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date time value of the attribute.
DateValue	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date value of the attribute.
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description of the attribute.
DeveloperName	Type string

Field	Details
	Properties Create, Filter, Group, Sort, Update Description The developer name of the integration provider attribute.
DoubleValue	Type double Properties Create, Filter, Nillable, Sort, Update Description The double value of the attribute.
IntegerValue	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description The integer value of the attribute.
IntegrationProviderDefId	Type reference Properties Create, Filter, Group, Sort Description The integration provider definition that's associated with the attribute. This field is a relationship field. Relationship Name IntegrationProviderDef Relationship Type Lookup Refers To IntegrationProviderDef
IsRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates if the attribute is required (true) or not (false). The default value is <code>false</code>.

Field	Details
IsTrueOrFalseValue	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The value in the boolean field of the attribute. The default value is <code>false</code>.
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description The master label of the attribute.
PercentageValue	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage value of the attribute.
StringValue	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The string value of the attribute.

IntegrationProviderDef

Represents the definition that's applicable to an integration provider. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
ApexClassId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The apex class that's associated with the definition. This field is a relationship field. Relationship Name ApexClass Relationship Type Lookup Refers To ApexClass
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description about the integration provider definition.
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description The developer name of the integration provider definition.
ExternalServiceOperationName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The external service registration that's associated with the integration provider.
FileBasedApexClass	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The API name of the file-based apex class.
InputDataProcessorId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The input data processor that's associated with the integration provider. This field is a relationship field. Relationship Name InputDataProcessor Relationship Type Lookup Refers To OmniIntegrationProcConfig
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the integration provider is active (true) or inactive (false). The default value is <code>false</code> .
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language of the integration provider definition.
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description A unique name of the integration provider definition.
NamespacePrefix	Type string

Field	Details
	Properties Filter, Group, Nillable, Sort Description Namespace prefix associated with this object.
OutputDataProcessorId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The output data processor that's associated with the integration provider. This field is a relationship field. Relationship Name OutputDataProcessor Relationship Type Lookup Refers To OmniIntegrationProcConfig
Type	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the type of definition that's defined for an integration provider. Possible values are: - Apex - LowCode—Low Code

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
AttendeeResponse	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the response of the attendee to the interaction. Possible values are: • Accepted • Declined • Awaiting Response
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.
EmailAddress	Type email Properties Create, Filter, Group, Nillable, Sort, Update Description The email address of the attendee.
EventId	Type reference

Field	Details
	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.
IsOrganizer	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the attendee is the interaction organizer. 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.
LastSyncedDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
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.
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.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InteractionAttendeeFeed](#) on page 574

Feed tracking is available for the object.

[InteractionAttendeeHistory](#) on page 581

History is available for tracked fields of the object.

InteractionParticipant

Represents a user or User Group with whom the interaction is shared. This object is available in API version 52.0 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.
InteractionId	Type reference Properties Create, Filter, Group, Sort Description The call report that's shared with this user. This is a relationship field. Relationship Name Interaction Relationship Type Lookup Refers To Interaction
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether this participant is active. 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

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.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the call report participant.
ParticipantId	Type reference Properties Create, Filter, Group, Sort Description The user or group that the call report is shared with. This is a polymorphic relationship field. Relationship Name Participant Relationship Type Lookup Refers To Group, User
ParticipantRoleId	Type reference Properties Create, Filter, Group, Sort, Update Description The role assigned to this participant. This is a relationship field. Relationship Name ParticipantRole Relationship Type Lookup Refers To ParticipantRole

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

InteractionParticipantFeed on page 574

Feed tracking is available for the object.

InteractionParticipantHistory on page 581

History is available for tracked fields of the object.

InteractionRelatedAccount

Represents a junction between an interaction and account that's related to that interaction. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
<code>AccountId</code>	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account of a company that's associated with the interaction. This field is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
<code>AccountRole</code>	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the role of the account in the interaction.

Field	Details
	Possible values are: • Audit • Legal • Participating • Primary
Comment	Type textarea Properties Create, Nillable, Update Description The description about the account that's associated with the interaction.
InteractionId	Type reference Properties Create, Filter, Group, Sort, Update Description The interaction associated with the account. This field is a relationship field. Relationship Name Interaction Relationship Type Lookup Refers To Interaction
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 account that's related to the interaction.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InteractionRelatedAccountFeed](#) on page 574

Feed tracking is available for the object.

[InteractionRelatedAccountHistory](#) on page 581

History is available for tracked fields of the object.

InteractionSumDiscussedAccount

Represents information about the companies discussed in an interaction. This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
Comment	Type textarea Properties Create, Nillable, Update Description Notes about the account that's associated with the interaction summary.
DiscussedAccountId	Type reference Properties Create, Filter, Group, Sort, Update

Field	Details
	Description The company or organization mentioned in the interaction summary. This is a relationship field. Relationship Name DiscussedAccount Relationship Type Lookup Refers To Account
InteractionSummaryId	Type reference Properties Create, Filter, Group, Sort, Update Description The interaction summary associated with the interaction summary account record. This is a relationship field. Relationship Name InteractionSummary Relationship Type Lookup Refers To InteractionSummary
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

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description The name of the interaction summary account.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InteractionSumDiscussedAccountFeed](#) on page 574

Feed tracking is available for the object.

[InteractionSumDiscussedAccountHistory](#) on page 581

History is available for tracked fields of the object.

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.

Field	Details
	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 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

Field	Details
	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: - 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.

Field	Details
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

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InteractionSummaryFeed](#) on page 574

Feed tracking is available for the object.

[InteractionSummaryHistory](#) on page 581

History is available for tracked fields of the object.

[InteractionSummaryOwnerSharingRule](#) on page 585

Sharing rules are available for the object.

[InteractionSummaryShare](#) on page 588

Sharing is available for the object.

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.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	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.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[InteractionSummaryParticipantFeed](#) on page 574

Feed tracking is available for the object.

[InteractionSummaryParticipantHistory](#) on page 581

History is available for tracked fields of the object.

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.

Field Name	Details
CreatedFromLead__c	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether a contact converted from this lead sets the value of <code>Contact.CreatedFromLead__c</code> as <code>true</code> or not (<code>false</code>).
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 <code>Category</code>. 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

Field Name	Details
	Description ID of the household record associated with the lead record.
PotentialValue__c	Type currency Properties Filter, Nillable, Sort Description Potential value from converting the lead.
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

Field Name	Details
	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
<code>Client__c</code>	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Individual the life event is related to.
<code>CurrencyIsoCode</code>	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.
<code>DiscussionNote__c</code>	Type textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description Notes from past discussions.

Field	Details
EventDate__c	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description Date of the life event.
EventType__c	Type picklist 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

Field	Details
	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

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Applicant's borrower type. Values are: - Borrower - CoBorrower
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.

Field	Details
EthnicitySubType	Type multipicklist Properties Create, Filter, Nillable, Update Description Borrower's ethnicity origin. Possible values are: • Cuban • 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

Field	Details
	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.
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

Field	Details
	Properties Create, Filter, Group, Sort Description Loan application associated with this borrower.
MaritalStatus	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update 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

Field	Details
	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.
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

Field	Details
	Description Borrower's preferred communication language. Possible values are: - Chinese - English - I do not wish to respond - Korean - Other - Spanish - Tagalog - 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.

Field	Details
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.

Field	Details
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
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

Field	Details
	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.
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

Field	Details
	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.
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

Field	Details
	Description The address postal code.
ResidenceState	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The address state.
ResidenceStreet	Type textarea 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.

Field	Details
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.
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 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

Field	Details
	• 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 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

Field	Details
	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 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.

Field	Details
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 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

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.
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

Field	Details
	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 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 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

Field	Details
	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.
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

Field	Details
	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 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

Field	Details
	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).
IsRelToTransactionParty	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether borrower is employed by a family member, property 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.

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.
LoanApplicantId	Type reference Properties Create, Filter, Group, Sort 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

Field	Details
	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 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

Field	Details
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.
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 • 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

Field	Details
	• Notes Receivable • Other • Public Assistance • Retirement • Royalty Payments • Separate Maintenance • Social Security • Trust • Unemployment Benefits • VA Compensation
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.

Field	Details
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 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 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.

Field	Details
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 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.
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

Field	Details
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.
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.

Field	Details
	Possible values are: • EUR—Euro • INR—Indian Rupee • USD—U.S. Dollar
DispositionType	Type picklist 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

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.
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

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description Cash value of real estate asset if sold today.
RealEstateAddress	Type address 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.

Field	Details
RealEstateLongitude	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.
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 $\begin{aligned} &\text{PurchasePriceAmount} + \text{RemodelAndRepairsAmount} + \\ &\text{LandAcquiredSeparatelyAmount} + \text{OutstandingLoanAmount} + \\ &\text{TotalDebtPaidOffAmount} + \text{BorrowerClosingCostAmt} + \\ &\text{DiscountPointCostAmount} - \text{LoanExclFinMortInsAmt} - \\ &\text{FinancedMortgageInsAmt} - \text{CreditFromSeller} - \text{OtherCredit} \end{aligned}$

Field	Details
CounselingAgencyName	Type string Properties Create, Filter, Group, Nillable, Sort, Update 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

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
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

Field	Details
	Description Proposed monthly mortgage insurance payment on application property.
EstOtherDuesPaymentAmt	Type currency 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.

Field	Details
FinancedMortgageInsAmt	Type currency Properties Create, Filter, Nillable, Sort, Update Description Total amount of financed mortgage insurance or financed mortgage insurance equivalent.
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

Field	Details
	Description Indicates the format of homeownership education attended by borrower. Possible values are: • Attended Workshop in Person • Completed Web-Based Workshop
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

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.
LoanAmount	Type currency Properties Filter, Nillable, Sort Description Total amount of loan including financed mortgage insurance or mortgage insurance equivalent. Formula $\text{LoanExclFinMortInsAmt} + \text{FinancedMortgageInsAmt}$
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

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the loan application financial.
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.

Field	Details
TotalCashDueFromBorrower	Type currency Properties Filter, Nillable, Sort Description Total cash due from borrower at closing. Formula <pre>PurchasePriceAmount + RemodelAndRepairsAmount + LandAcquiredSeparatelyAmount + OutstandingLoanAmount + TotalDebtPaidOffAmount + BorrowerClosingCostAmt + DiscountPointCostAmount</pre>
TotalCredit	Type currency Properties Filter, Nillable, Sort Description Total borrower credits. Formula <pre>CreditFromSeller + OtherCredit</pre>
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 <pre>EstFirstMortgagePmtAmt + EstSubordinateLienPmtAmt + EstHomeownersInsPmtAmt + EstSuppPropertyInsPmtAmt + EstPropertyTaxesPmtAmt + EstMortgageInsPmtAmt + EstOtherDuesPaymentAmt + EstOtherPaymentAmt</pre>

Field	Details
TotalMortgageLoanAndCreditAmt	Type currency Properties Filter, Nillable, Sort Description Total mortgage loans plus total credits. Formula <pre>LoanExclFinMortInsAmt + FinancedMortgageInsAmt + CreditFromSeller + OtherCredit</pre>
TotalMortgageLoansAmount	Type currency Properties Filter, Nillable, Sort Description Total amount of loan. Formula <pre>LoanExclFinMortInsAmt + FinancedMortgageInsAmt</pre>

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 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

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
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

Field	Details
LiabilityExtIdentifier	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.
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.

Field	Details
Name	Type string 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.

MultipartInfoAuthRequest

Tracks a request for multiple parties of authorization on a Data Use Purpose. For example, consent requests to share the required documents to open a joint financial account or share mortgage disclosures to loan applicants (borrower + co-borrower). This object is available in API version 53.0 and later.

Supported Calls

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

Fields

Field	Details
AuthorizationType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The number of parties needed for consent- all parties must accept / majority parties need to consent or at least one party must consent. Possible values are: • All • Any

Field	Details
	- HalfOrMajority—Half or Majority - Majority The default value is 'All'.
DataUsePurposeId	Type reference Properties Create, Filter, Group, Sort, Update Description Reference to the purpose of this request. This is a relationship field. Relationship Name DataUsePurpose Relationship Type Lookup Refers To DataUsePurpose
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 info authorization request record.

Field	Details
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who created the relationship record. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ResponseStatus	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The consentees' aggregate response to this request, based on the authorization type. Possible values are: • New • Rejected • Seen • Signed The default value is 'New'.
SourceRecordId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The record from which this consent request is created. This is a relationship field. Relationship Name SourceRecord Relationship Type Lookup

Field	Details
	Refers To Account, BusinessMilestone, Campaign, Case, Claim, ClaimItem, Contact, Contract, DocumentChecklistItem, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, InsurancePolicyCoverage, Lead, Opportunity, OpportunityLineItem, Order, OrderItem, PersonLifeEvent, Quote, QuoteLineItem, ResidentialLoanApplication, Task

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.

Field Name	Details
ReferredByUser__c	Type reference 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.

Associated Objects

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

OpportunityParticipantFeed on page 574 (API version 52.0)

Feed tracking is available for the object.

OpportunityParticipantHistory on page 581 (API version 52.0)

History is available for tracked fields of the object.

PartyCertifiedCapacity

Represents the information captured from the certificate of capacity, such as the party's capacity to work, a timeline for recovery, and return to work. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
Capacity	Type percent Properties Create, Filter, Nillable, Sort, Update Description The percentage of capacity the party is able to work.
ClaimId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Claim associated with the Party Certified Capacity. This field is a relationship field. Relationship Name Claim Relationship Type Lookup Refers To Claim
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar The default value is USD.
EffectiveEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the period the certificate is effective for.
EffectiveStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the period the certificate is effective for.
ExpectedWorkReturnDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The expected date the party returns to work.
FullCapacityFromDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date the party has the full capacity to work.
IssueDate	Type date

Field	Details
	Properties Create, Filter, Group, Sort, Update Description The date the certificate was issued.
IssuerId	Type reference Properties Create, Filter, Group, Sort, Update Description The Issuer of the Party Certified Capacity. This field is a polymorphic relationship field. Relationship Name Issuer Relationship Type Lookup Refers To Account, Contact, HealthcareProvider
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description Name of the party certified capacity.

Field	Details
NoCapacityEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the certified period in which the party has no capacity to work.
NoCapacityStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the certified period in which the party has no capacity to work.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The Owner associated with the Party Certified Capacity. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartialCapacityEndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date of the certified period in which the party has some capacity to work.
PartialCapacityStartDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The start date of the certified period in which the party has some capacity to work.

Field	Details
PartyId	Type reference Properties Create, Filter, Group, Sort, Update Description The Party associated with the Party Certified Capacity. This field is a polymorphic relationship field. Relationship Name Party Relationship Type Lookup Refers To Account, ClaimParticipant, Contact
Status	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the status of the certificate. Possible values are: • Active • Expired • Pending Approval • Submitted
UsageType	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Internal field. Specifies the application using the entity to populate data. Possible values are: • Claim

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

PartyCertifiedCapacityFeed on page 574

Feed tracking is available for the object.

PartyCertifiedCapacityHistory on page 581

History is available for tracked fields of the object.

PartyCertifiedCapacityOwnerSharingRule on page 585

Sharing rules are available for the object.

PartyCertifiedCapacityShare on page 588

Sharing is available for the object.

PartyIncome

"Represents the income of an individual. This income can be from salaries, commissions, fees, rental properties, and other sources." This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
CalendarYear	Type int Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The calendar year when the income was earned.
ClaimId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Claim associated with the Party Income. This field is a relationship field. Relationship Name Claim Relationship Type Lookup Refers To Claim

Field	Details
CurrencyIsoCode	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description If multiple currencies are enabled, this field contains the currency ISO code associated with the record. Possible values are: • AED—UAE Dirham • CAD—Canadian Dollar • GBP—British Pound • JPY—Japanese Yen • USD—U.S. Dollar The default value is USD.
EmployerAddress	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The compound form of the employer's address.
EmployerId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The Employer associated with the Party Income. This field is a relationship field. Relationship Name Employer Relationship Type Lookup Refers To Account
EmployerName	Type string Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Name of the employer.
EmployerPhone	Type phone Properties Create, Filter, Group, Nillable, Sort, Update Description The phone number of the employer.
EndDate	Type dateTime Properties Create, Filter, Sort, Update Description The date when the party income ends.
IncomeAmount	Type currency Properties Create, Filter, Sort, Update Description The amount of the party income.
IncomeFrequency	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the frequency of the party income. Possible values are: Weekly
IncomeStatus	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the status of the party income. Possible values are: Active

Field	Details
IncomeType	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the type of the income. Possible values are: • Salary • Wages
JobTitle	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The job title of the party.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description Name of the party income.
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The Owner associated with the Party Income. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyId	Type reference Properties Create, Filter, Group, Sort, Update Description The Party associated with the Party Income. This field is a polymorphic relationship field. Relationship Name Party Relationship Type Lookup Refers To ClaimParticipant, Contact
StartDate	Type dateTime Properties Create, Filter, Sort, Update Description The date when the party income starts.
UsageType	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Internal field. Specifies the application using the party income to populate data. Possible values are:

Field	Details
	• Claim

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.

Field	Details
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 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

PartyIdentityVerification

Represents information about the identity verification checks done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
IsResultOverridden	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the party identity verification result was overridden. The default value is <code>false</code>.
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 party identity verification record.
OverriddenById	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The record of the user who is responsible for overriding the party identity verification result. This field is a relationship field. Relationship Name OverriddenBy

Field	Details
	Relationship Type Lookup Refers To User
OverriddenResult	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the overridden result for a party after the party identity verification is complete. Possible values are: - Accepted - On Hold - Rejected
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyProfileId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The party profile that's associated with the third-party identity verification. This field is a relationship field. Relationship Name PartyProfile

Field	Details
	Relationship Type Lookup Refers To PartyProfile
ReportUrl	Type url Properties Create, Filter, Group, Nillable, Sort, Update Description The URL of the report provided by the third-party identity verification agency.
RequestCompletionDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date when the party identity verification request was completed.
Result	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the result of the party identity verification. Possible values are: - Accepted - On Hold - Rejected
ResultOverrideComment	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The description about the party identity verification.
ResultOverrideReason	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the reason for overriding the party identity verification request. Possible values are: • In Person Verification • Manual Verification
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the party identity verification request. Possible values are: • Completed • In Progress • Initiated
ThirdPartyVerfIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the identity verification record in the third-party identity verification system.
VerificationRequestDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date when the party identity verification request was submitted.
VerifiedBy	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the third-party that conducted the identity verification.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

PartyIdentityVerificationFeed on page 574

Feed tracking is available for the object.

PartyIdentityVerificationHistory on page 581

History is available for tracked fields of the object.

PartyIdentityVerificationShare on page 588

Sharing is available for the object.

PartyIdentityVerificationStep

Represents information about the identity verification done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
IdVerificationArtifactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The artifact submitted for identity verification. This field is a relationship field. Relationship Name IdVerificationArtifact Relationship Type Lookup Refers To IdentityDocument
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 Create, Filter, Group, idLookup, Sort, Update Description The name of the party profile verification step record.
PartyIdentityVerificationId	Type reference Properties Create, Filter, Group, Sort Description The party identity verification record that's associated with the verification step. This field is a relationship field. Relationship Name PartyIdentityVerification Relationship Type Lookup Refers To PartyIdentityVerification
ReportUrl	Type url Properties Create, Filter, Group, Nillable, Sort, Update Description The URL of the report provided by the third-party identity verification agency.
Status	Type picklist

Field	Details
	Properties Create, Filter, Group, Sort, Update Description Specifies the status of the third-party identity verification. Possible values are: - Cancelled - Completed - In Progress - Initiated
Type	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the type of the third-party identity verification. Possible values are: - Document - Facial Biometric - Other Biometric
VerificationDecision	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the decision taken after the third-party identity verification is completed. Possible values are: - Accepted - Manual Review Required - Not Accepted

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PartyIdentityVerificationStepFeed](#) on page 574

Feed tracking is available for the object.

PartyIdentityVerificationStepHistory on page 581

History is available for tracked fields of the object.

PartyProfile

Represents information about the profile of a party, such as a contact, account, or lead. This object is available in API version 56.0 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 account that's associated with the party profile. This field is a relationship field. Relationship Name Account Relationship Type Lookup Refers To Account
ContactId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The contact that's associated with the party profile. This field is a relationship field. Relationship Name Contact Relationship Type Lookup

Field	Details
	Refers To Contact
CountryOfDomicile	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the country of domicie in the party profile.
CountryofBirth	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the country of birth in the party profile.
CreditScore	Type double Properties Create, Filter, Nillable, Sort, Update Description The credit score of the party.
CreditScoreProvider	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the name of the agency that provides the credit score of the party.
EmploymentIndustry	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the employment industry of the party specified in the profile. Possible values are: • Banking • Energy and Utilities • Government

Field	Details
	• Healthcare • IT • Mining • Real Estate
EmploymentType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of employment held by the party. Possible values are: • Full Time • Independent Contractor • Part Time • Retired • Student • Temporary • Unemployed
FirstName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The first name of the party in the profile.
FullName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The full name of the party profile.
FundSource	Type multipicklist Properties Create, Filter, Nillable, Update Description Specifies the source of funds for a party in the profile.

Field	Details
	Possible values are: • Business Income • Commission • Government Benefits • Rental Income • Salary
Gender	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the gender of the party in the profile. Possible values are: • Decline to Specify • Female • Male
HouseholdAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The household account that's associated with the party profile. This field is a relationship field. Relationship Name HouseholdAccount Relationship Type Lookup Refers To Account
IsNetWorthHigh	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the customer has a high net worth (true) or not (false). The default value is <code>false</code>.

Field	Details
IsOffBoarded	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the party profile was off-boarded (true) or not (false). The default value is <code>false</code>.
LastName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The last name of the party in the profile.
LastProfileReviewDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date when the party profile was last reviewed.
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.
LeadId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The lead that's associated with the party profile. This field is a relationship field. Relationship Name Lead Relationship Type Lookup Refers To Lead
MiddleName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The middle name of the party in the profile.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the party profile record.
Nationality	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The nationalities held by the party profile.
NextProfileReviewDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date of the next party profile review.
OffBoardingComments	Type textarea

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The date of the next party profile review.
OffBoardingReason	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The reason the party profile was off-boarded.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
Prefix	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The prefix used by the party.
PrimaryEmail	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The primary email address of the party that's specified in the profile.

Field	Details
PrimaryIdentificationName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the primary identification document specified in the profile.
PrimaryIdentifierType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of primary identification document defined in the profile. Possible values are: • Birth Certificate • Driving License • Government ID • Passport
PrimaryPhone	Type phone Properties Create, Filter, Group, Nillable, Sort, Update Description The primary phone number of the party that's specified in the profile.
RelatedPartyProfileId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The party profile record associated with this record. This field is a relationship field. Relationship Name RelatedPartyProfile Relationship Type Lookup Refers To PartyProfile

Field	Details
ResidentType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of party residency in the profile.
ReviewDecision	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the decision taken after the party profile review is complete. Possible values are: - Accepted - On Hold - Rejected
Suffix	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The suffix used by the party.
SurnameAtBirth	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The party surname at birth specified in the profile.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PartyProfileFeed](#) on page 574

Feed tracking is available for the object.

[PartyProfileHistory](#) on page 581

History is available for tracked fields of the object.

PartyProfileShare on page 588

Sharing is available for the object.

PartyProfileAddress

Represents information about the address of the party. This object is available in API version 56.0 and later.

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 full address.
AddressType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of party address. Possible values are: • Billing • Shipping • Temporary
City	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The city detail for the address. For example, this field is known as MailingCity on Contact.
Country	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description The country detail for the address. For example, this field is known as MailingCountry on Contact.
GeocodeAccuracy	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. Possible values are: • Address • Block • City • County • ExtendedZip • NearAddress • Neighborhood • State • Street • Unknown • Zip
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
Latitude	Type double Properties Create, Filter, Nillable, Sort, Update Description Used with Longitude to specify the precise geolocation of the address. For example, this field is known as MailingLatitude on Contact.
Longitude	Type double Properties Create, Filter, Nillable, Sort, Update Description Used with Latitude to specify the precise geolocation of the address. For example, this field is known as MailingLongitude on Contact.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the party profile address record.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyProfileId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The party profile that's associated with the address. This field is a relationship field. Relationship Name PartyProfile Relationship Type Lookup Refers To PartyProfile
PostalCode	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The postal code for the address. For example, this field is known as MailingPostalCode on Contact.
State	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The state detail for the address. For example, this field is known as MailingState on Contact.
Street	Type textarea Properties Create, Filter, Group, Nillable, Sort, Update Description The street detail for the address. For example, this field is known as MailingStreet on Contact.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PartyProfileAddressFeed](#) on page 574

Feed tracking is available for the object.

[PartyProfileAddressHistory](#) on page 581

History is available for tracked fields of the object.

PartyProfileAddressShare on page 588

Sharing is available for the object.

PartyProfileRisk

Represents information about the risk assessment done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
IsRiskOverridden	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the risk assessment result of the party was overridden. The default value is <code>false</code> .
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

Field	Details
	Description The name of the party profile risk record.
OverridenRiskCategory	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the risk category that's overridden for a party after the assessment is complete. Possible values are: - High - Low - Medium
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
PartyProfileId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The party profile that's associated with the risk assessment. This field is a relationship field. Relationship Name PartyProfile Relationship Type Lookup

Field	Details
	Refers To PartyProfile
RiskCategory	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the risk category that's assigned to a party profile after the assessment is complete. Possible values are: - High - Low - Medium
RiskOverriddenById	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The user who overrode the risk assessment result of the party. This field is a relationship field. Relationship Name RiskOverriddenBy Relationship Type Lookup Refers To User
RiskOverrideReason	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The reason for overriding the risk assessment result.
Type	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the type of risk assessment.

Field	Details
	Possible values are: • Final • Initial

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PartyProfileRiskFeed](#) on page 574

Feed tracking is available for the object.

[PartyProfileRiskHistory](#) on page 581

History is available for tracked fields of the object.

[PartyProfileRiskShare](#) on page 588

Sharing is available for the object.

PartyScreeningStep

Represents information about the screening process conducted for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
DisclaimerText	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The disclaimer text received for the party profile screening.
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.
MatchedFieldList	Type multipicklist Properties Create, Filter, Nillable, Update Description Specifies the fields that matched during the party profile screening. Possible values are: - Address - First Name - ID - Last Name
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the party screening step record.
ResponseCodeComment	Type textarea Properties Create, Filter, Nillable, Sort, Update Description The description of the response code.
ResultCode	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The code received after the party profile screening is completed.
ScreeningSummaryId	Type reference Properties Create, Filter, Group, Sort Description The party screening summary record associated with this screening step. This field is a relationship field. Relationship Name ScreeningSummary Relationship Type Lookup Refers To PartyScreeningSummary
Status	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the status of the third-party party profile screening. Possible values are: - Cancelled - Completed - In Progress - Initiated
Type	Type picklist Properties Create, Filter, Group, Sort, Update Description Specifies the type of the third-party party profile screening. Possible values are: - Adverse Media - Global Sanctions - OFAC - PEP

PartyScreeningSummary

Represents information about the individual screening done for a party. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
IsResultOverridden	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the party profile screening result was overridden. The default value is <code>false</code>.
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 party screening summary record.

Field	Details
OverriddenById	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The user who is responsible for overriding the party profile screening result. This field is a relationship field. Relationship Name OverriddenBy Relationship Type Lookup Refers To User
OverriddenScreeningDecision	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the overridden result for a party after the screening is complete. Possible values are: • Clear • On Hold • Rejected
OverrideDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date and time when the party profile screening was overridden.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
PartyProfileId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The party profile that's associated with the third-party profile screening. This field is a relationship field.
	Relationship Name PartyProfile
	Relationship Type Lookup
	Refers To PartyProfile
ReportUrl	Type url
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The URL of the report provided by the third-party profile screening agency.
RequestCompletionDate	Type dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date when the party profile screening request was completed.
ResultOverrideComment	Type textarea
	Properties Create, Filter, Nillable, Sort, Update
	Description The description about the party profile screening.

Field	Details
ResultOverrideReason	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the reason for overriding the party profile screening request. Possible values are: Manual Verification
ScreenedBy	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The name of the third-party that conducted the profile screening.
ScreeningDecision	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the result of the party profile screening. Possible values are: - Clear - On Hold - Rejected
ScreeningRequestDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date when the screening request for the party profile was submitted.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Specifies the status of the party profile screening request.

Field	Details
	Possible values are: - Completed - In Progress - Initiated
ThirdPartyScreeningIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The ID of the profile screening record in the third-party profile screening system.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PartyScreeningSummaryFeed](#) on page 574

Feed tracking is available for the object.

[PartyScreeningSummaryHistory](#) on page 581

History is available for tracked fields of the object.

[PartyScreeningSummaryShare](#) on page 588

Sharing is available for the object.

PaymentRequest

Represents a financial compensation request for goods or services provided by a third party. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

This object is available if the add-on license for Claims Management is enabled.

Fields

Field	Details
ClaimId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The claim associated with the payment request. This is a relationship field. Relationship Name Claim Relationship Type Lookup Refers To Claim
DueDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The due date of the payment request.
EndDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The end date of services represented in the payment request.
FacilityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The facility associated with the payment request. This is a polymorphic relationship field. Relationship Name Facility Relationship Type Lookup

Field	Details
	Refers To Account, Location
InsurancePolicyId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The insurance policy associated with the payment request. This is a relationship field. Relationship Name InsurancePolicy Relationship Type Lookup Refers To InsurancePolicy
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 Payment Request.
OwnerId	Type reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The ID of the record owner. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ReceivedDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date on which the recipient received the payment request.
ReceivedMethod	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The method in which the payment request was received. Possible values include: • Electronic Submission • Paper Mail
ReferenceNumber	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description External unique identifier from the submitting party, such as an invoice number.
RemittanceAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The account that receives the remittance payment for the services. This is a polymorphic relationship field. Relationship Name RemittanceAccount Relationship Type Lookup Refers To Account, InsurancePolicyParticipant
ServiceProviderId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The service provider associated with the payment request. This is a polymorphic relationship field. Relationship Name ServiceProvider Relationship Type Lookup Refers To Account, Contact
ServiceRecipientId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The account that receives the services in the payment request. This is a polymorphic relationship field. Relationship Name ServiceRecipient Relationship Type Lookup Refers To Account, Contact, InsurancePolicyParticipant
StartDateTime	Type dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description The start date of services represented in the payment request.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Status of the payment request. Possible values include: • Paid • Received
SubmissionType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Type of payment request submission, such as an invoice from a service provider. Possible values include: • Invoice • Online Submission
SubmittedDate	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The date on which the service provider submitted the payment request.
SubmittingAccountId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The billing account that submits the payment to the service recipient. This is a relationship field.

Field	Details
	Relationship Name SubmittingAccount
	Relationship Type Lookup
	Refers To Account
TotalAdjustmentAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Total amount that is adjusted, such as the collection of a copay onsite. This is a calculated field.
TotalRequestedAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Total amount requested for reimbursement. This is a calculated field.
TotalServiceAmount	Type currency
	Properties Filter, Nillable, Sort
	Description Total amount of the services, such as the total services billed. This is a calculated field.

Usage

Use this object to process inbound requests for payments, such as an inbound invoice submitted to an insurance carrier.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PaymentRequestFeed](#) on page 574

Feed tracking is available for the object.

PaymentRequestHistory on page 581

History is available for tracked fields of the object.

PaymentRequestOwnerSharingRule on page 585

Sharing rules are available for the object.

PaymentRequestShare on page 588

Sharing is available for the object.

PaymentRequestLine

Represents the line item details of the financial compensation request. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

This object is available if the add-on license for Claims Management is enabled.

Fields

Field	Details
AdjustmentAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description Adjustment amount for reasons such as copay, deductible, and coinsurance.
AdjustmentReason	Type multipicklist Properties Create, Filter, Nillable, Update Description The reason for adjustment. Possible values include: • Coinsurance • Copay • Deductible

Field	Details
BenefitName	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The name of benefit associated with the payment request line, such as Physical Therapy or Ambulance Transportation.
ClaimItemId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The claim item associated with the payment request line. This is a relationship field. Relationship Name ClaimItem Relationship Type Lookup Refers To ClaimItem
DiagnosticCodeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The diagnostic code associated with the payment request line. This is a polymorphic relationship field. Relationship Name DiagnosticCode Relationship Type Lookup Refers To CodeSet, CodeSetBundle
EndDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update

Field	Details
	Description The end date of services represented in the payment request line.
FacilityId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The facility associated with the payment request line. This is a polymorphic relationship field. Relationship Name Facility Relationship Type Lookup Refers To Account, Location
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 Payment Request Line.
PaymentRequestId	Type reference

Field	Details
	Properties Create, Filter, Group, Sort Description The payment request associated with the payment request line. This is a relationship field. Relationship Name PaymentRequest Relationship Type Lookup Refers To PaymentRequest
Quantity	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Number of units the payment request line represents, such as number of days in hospital.
QuantityUnitOfMeasure	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Unit of measure for the quantity field. Possible values include: • Days • Nights • Visits
RequestedAmount	Type currency Properties Create, Filter, Nillable, Sort, Update Description Amount that the requestor is seeking for payment, which is the service amount minus the adjustment amount.
ServiceAmount	Type currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update Description Total service amount for the payment request line before adjustments.
ServiceCodeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The service code associated with the payment request line. This is a polymorphic relationship field. Relationship Name ServiceCode Relationship Type Lookup Refers To CodeSet, CodeSetBundle
ServiceProviderId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The service provider associated with the payment request line. This is a polymorphic relationship field. Relationship Name ServiceProvider Relationship Type Lookup Refers To Account, Contact
ServiceType	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description Type of requested service. Possible values include:

Field	Details
	• Device • Medication • Procedure • Repairs
StartDateTime	Type dateTime Properties Create, Filter, Nillable, Sort, Update Description The start date of services represented in the payment request line.
Status	Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The status of the payment request line. Possible values include: • Paid • Partially Paid • Received
UnitPrice	Type currency Properties Create, Filter, Nillable, Sort, Update Description Unit Price for the quantity and quantity unit of measure.

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[PaymentRequestLineFeed](#) on page 574

Feed tracking is available for the object.

[PaymentRequestLineHistory](#) on page 581

History is available for tracked fields of the object.

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 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

Field	Details
	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 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

Field	Details
	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 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

Field	Details
	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 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.

Field	Details
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.
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

Field	Details
	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 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

Field	Details
	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 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.

Field	Details
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 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.

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 A unique identifier for the agent or the agency.
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

Field	Details
	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 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

Field	Details
	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 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.

Field	Details
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 - 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.
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.

Field	Details
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 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

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.
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.
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.

QuoteLineItemGroupClass

Represents the association of a Quote Line Item to GroupClass. Use this entity for large group quoting process when multiple group classes are attributed on a single quote line item. Child object of Quote. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
GroupClassId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The group class associated with the quote and quote line item. This is a relationship field. Relationship Name GroupClass Relationship Type Lookup Refers To GroupClass
LastReferencedDate	Type dateTime

Field	Details
	Properties Filter, Nillable, Sort Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description The timestamp when the current user last viewed this record or list view.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the quote line item group class.
QuoteLineItemId	Type reference Properties Create, Filter, Group, Sort Description The quote line item associated with the quote line item group class. This is a relationship field. Relationship Name QuoteLineItem Relationship Type Lookup Refers To QuoteLineItem

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

[QuoteLineItemGroupClassFeed](#) on page 574

Feed tracking is available for the object.

[QuoteLineItemGroupClassHistory](#) on page 581

History is available for tracked fields of 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 (<code>true</code>) or not (<code>false</code>).
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 <code>Role</code> and <code>InverseRole__c</code> 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

Field	Details
	Description The role that the other entity occupies in the relationship, such as a grandparent to a grandchild, or an owned business to a proprietor.
LastReferencedDate	Type dateTime Properties Filter, Nillable, Sort Description Timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Type dateTime Properties Filter, Nillable, Sort Description Timestamp for when the current user last viewed this record.
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 create, Filter, 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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Type of entities involved in the relationship. Valid values: • All • Contact Contact Relation • Account Account Relation
SourceSystemId__c	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description ID that uniquely identifies the reciprocal role in an external data source.

RecordAlert

Represents an alert message about a specific record and tracks the status and active period of the alert. This object is available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description A detailed description of the alert.
EffectiveDate	Type dateTime Properties Create, Filter, Sort, Update

Field	Details
	Description The date and time that the alert was generated or became active.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Whether the alert is still active (<code>true</code>) or has been dismissed (<code>false</code>). The default value is ' <code>false</code> '.
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 record alert.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who created the record alert. This is a polymorphic relationship field.

Field	Details
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ParentId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The user, account, or contact associated with the alert. This is a polymorphic relationship field.
	Relationship Name Parent
	Relationship Type Lookup
	Refers To Account, Case, Contact, DisputeConfig__c, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, FinancialTransactionDisputeInfo__c, Lead, LoanApplicant, LoanApplicantEmployment, LoanApplicantIncome, LoanApplicationAsset, LoanApplicationFinancial, LoanApplicationLiability, LoanApplicationProperty, Opportunity, ResidentialLoanApplication, ServiceRequest__c, TestCM__c, User, Vehicle__c, vlocity_lwc27__CardFrameworkConfiguration__c, vlocity_lwc27__DRBatchQueue__c, vlocity_lwc27__DRBulkData__c, vlocity_lwc27__DREncryption__c, vlocity_lwc27__DRWorker__c, vlocity_lwc27__Interface_DRGeneric__c, vlocity_lwc27__TestResult__c, vlocity_lwc27__TriggerSetup__c, vlocity_lwc27__UISettings__c, vlocity_lwc27__VlocityDataPack__c, vlocity_lwc27__VlocityDocuSignTemplate__c, vlocity_lwc27__VlocityErrorLogEntry__c, vlocity_lwc27__VlocityScheduledJob__c, vlocity_lwc27__VlocityTrackingEntry__c

Field	Details
RecordAlertCategoryId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The category for the alert. This is a relationship field. Relationship Name RecordAlertCategory Relationship Type Lookup Refers To RecordAlertCategory
Severity	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The severity of the alert, which can be pulled from the Record Alert Category or overridden. Possible values are: • Error • Info • Warning
SourceSystemIdentifier	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The unique identifier for the alert in an external system.
Subject	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description A short description of the alert.
ValidUntilDate	Type dateTime

Field	Details
	Properties Create, Filter, Sort, Update Description The date and time when the alert becomes invalid.
WhatId	Type reference Properties Create, Filter, Group, Sort, Update Description The record that the alert pertains to. This is a polymorphic relationship field. Relationship Name What Relationship Type Lookup Refers To Account, Asset, BusinessMilestone, Case, Claim, Contact, Contract, DisputeConfig__c, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, FinancialTransactionDisputeInfo__c, InsurancePolicy, InsurancePolicyCoverage, Lead, LoanApplicant, LoanApplicantEmployment, LoanApplicantIncome, LoanApplicationAsset, LoanApplicationFinancial, LoanApplicationLiability, LoanApplicationProperty, Opportunity, PersonLifeEvent, ResidentialLoanApplication, ServiceRequest__c, TestCM__c, Vehicle__c, vlocity_lwc27__CardFrameworkConfiguration__c, vlocity_lwc27__DRBatchQueue__c, vlocity_lwc27__DRBulkData__c, vlocity_lwc27__DREncryption__c, vlocity_lwc27__DRWorker__c, vlocity_lwc27__Interface_DRGeneric__c, vlocity_lwc27__TestResult__c, vlocity_lwc27__TriggerSetup__c, vlocity_lwc27__UISettings__c, vlocity_lwc27__VlocityDataPack__c, vlocity_lwc27__VlocityDocuSignTemplate__c, vlocity_lwc27__VlocityErrorLogEntry__c, vlocity_lwc27__VlocityScheduledJob__c, vlocity_lwc27__VlocityTrackingEntry__c

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
ApplicationExtIdentifier	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).
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 Description Indicates whether loan has other amortization feature.
HasPrepaymentPenalty	Type boolean

Field	Details
	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 Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether borrower is applying for a balloon payment mortgage.

Field	Details
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.
IsNegativeAmortization	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	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 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.

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.
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 Properties Create, Filter, Nillable, Sort, Update Description Date the property or land was purchased.

Field	Details
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 Description Type of mortgage program applied for. Values are: • Conventional • FHA

Field	Details
	• Other • USDA Rural Housing Service • 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 Properties Create, Filter, Group, Nillable, Sort, Update Description Description of other amortization type for government loans.
OtherLoanFeature	Type string

Field	Details
	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 Properties Create, Filter, Nillable, Sort, Update Description Number of months during which borrower incurs a penalty for early payoff of the loan balance.

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

Field	Details
	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.
TotalOtherAssetAmount	Type currency Properties Filter, Nillable, Sort

Field	Details
	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 <code>Symbol</code> .
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.

SvcCatalogItemAttribute

Represents pre-filled fulfillment flow inputs and user questions to ask to users in the context of a service catalog item version. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
AttributeType	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description Type of the attribute used to determine if it's a pre-filled input or a questions to ask to users. Possible values are: • Base

Field	Details
	Extended The default value is Extended.
DataType	Type picklist Properties Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update Description Type of the attribute value used into to render questions and validate data filled by users. Possible values are: - Attachment - Checkbox - Currency - Date - Datetime - DisplayText - Email - IPAddress - Integer - ListOfBoolean - ListOfDouble - ListOfInteger - ListOfMaps - ListOfString - Lookup - Map - MultilineText - Number - NumericScale - Percentage - Picklist - Queue - SinglelineText - Text - URL The default value is Text.
Description	Type string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update Description Description of the service catalog item attribute.
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description Unique name in the scope of a Service Catalog Item Version.
FieldIdentifier	Type picklist Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The unique identifier of the custom or standard field. Possible values are: • CaseId • CatalogItemDescription • CatalogItemName • CloneSourceId • ClosedDate • CreatedById • CreatedDate • Id • IsClosed • IsDeleted • ItemFlowVersion • ItemFlowVersionLookupId • LastModifiedById • LastModifiedDate • LastReferencedDate • LastViewedDate • Name • OwnerId • SubmitterId • SvcCatalogItemDefinitionId

Field	Details
	• SystemModstamp • UserRecordAccessId
InputVariable	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description References the input variable in which the attribute value will be forwarded.
InputVariableValue	Type textarea Properties Create, Nillable, Update Description Attribute value defined by the catalog builder.
IsRequired	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates if the service catalog item attribute is required. The default value is <code>false</code>.
ItemVersionStatus	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort Description Specifies the status of the service catalog item version for which the attribute is defined. Possible values are: • Active • Draft • Obsolete The default value is <code>Draft</code>.
Label	Type string Properties Create, Filter, Group, Sort, Update

Field	Details
	Description A label for the service catalog item attribute.
ParentAttributeId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update Description The associated record. This field is a relationship field. Relationship Name ParentAttribute Relationship Type Lookup Refers To SvcCatalogItemAttribute
SortOrder	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Sort order used to display questions in a specific order.
SvcCatalogItemDefId	Type reference Properties Filter, Group, Nillable, Sort Description The service catalog item definition for which the attribute is defined. This field is a relationship field. Relationship Name SvcCatalogItemDef Relationship Type Lookup Refers To SvcCatalogItemDef

SvcCatalogItemDependency

Represents a collection of records that indicate the dependencies of a service process. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
DependencyReferenceId	Type reference Properties Create, Filter, Group, Sort, Update Description The object that's associated with the dependency. This field is a polymorphic relationship field. Relationship Name DependencyReference Relationship Type Lookup Refers To ApexClass, IntegrationProviderDef, OmniScriptConfig
Type	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Specifies the type of dependency. Possible values are: • FlowDefinition—Flow Definition • IntegrationProviderDef—Integration Provider Definition • OmniScriptConfig—Omni Script Configuration • PreprocessorApexClass—Preprocessor Apex Class

TagCategory

Group similar interest tags together into tag categories. This object is available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description A detailed description of the tag category.
Icon	Type picklist Properties Create, Filter, Group, Restricted picklist, Sort, Update Description Icon to visually represent your tag category.
IsActive	Type boolean Properties Create, Defaulted on create, Filter, Group, Sort, Update Description Indicates whether the tag category is still active (<code>true</code>) or has been dismissed (<code>false</code>). The default value is ' <code>false</code> '.
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.
Level	Type int Properties Create, Filter, Group, Nillable, Sort, Update Description Create a hierarchy of levels of tag categories.
Name	Type string Properties Create, Filter, Group, idLookup, Sort, Update Description The name of the tag category.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description ID of the user who created the tag category. This is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ParentCategoryId	Type reference Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The user, account, or contact associated with the tag category. This is a relationship field.
	Relationship Name ParentCategory
	Relationship Type Lookup
	Refers To TagCategory

Task Custom Fields

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

Fields

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

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

UserFinancialAuthority

Represents the maximum monetary amount a user can authorize for a given financial type and product. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
Description	Type string Properties Create, Filter, Group, Nillable, Sort, Update Description The configuration details for the user financial authority record. This field can't be edited.
EndDate	Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The end date when the user financial authority is in effect.
EvaluationMethod	Type picklist Properties Create, Filter, Group, Sort Description The logic that validates the user financial authority. For example, the Claim Coverage Valuation method validates that a payment on a claim coverage doesn't exceed the maximum amount allowed for the user on that claim coverage product. Possible values are: • Claim Coverage Valuation
FinancialType	Type picklist Properties Create, Filter, Group, Sort

Field	Details
	Description The financial type associated with the user financial authority. Possible values are: • Claim Expense • Claim Loss
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.
MaximumApprovalAmount	Type currency Properties Create, Filter, Sort, Update Description The maximum monetary amount a user can approve for a financial activity.
Name	Type string Properties Create, Filter, Group, idLookup, Nillable, Sort, Update Description The name of the financial user authority.
OwnerId	Type reference Properties Create, Defaulted on create, Filter, Group, Sort, Update Description The owner associated with the user financial authority.

Field	Details
	This field is a polymorphic relationship field. Relationship Name Owner Relationship Type Lookup Refers To Group, User
ProductId	Type reference Properties Create, Filter, Group, Nillable, Sort Description The product associated with the user financial authority. This field is a relationship field. Relationship Name Product Relationship Type Lookup Refers To Product2
StartDate	Type date Properties Create, Filter, Group, Sort, Update Description The start date when the user financial authority is in effect.
UserId	Type reference Properties Create, Filter, Group, Nillable, Sort Description The user associated with the user financial authority. This field is a relationship field. Relationship Name User Relationship Type Lookup

Field	Details
	Refers To User

Associated Objects

This object has the following associated objects. If the API version isn't specified, they're available in the same API versions as this object. Otherwise, they're available in the specified API version and later.

UserFinancialAuthorityHistory on page 581

History is available for tracked fields of the object.

UserFinancialAuthorityOwnerSharingRule on page 585

Sharing rules are available for the object.

UserFinancialAuthorityShare on page 588

Sharing is available for the object.

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.

Field	Details
Name	Type string Properties Autonumber, Defaulted on create, Filter, idLookup, Sort Description The name of the compensation coverage class.
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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The number of employees in this compensation coverage class.
WorkerLocationId	Type reference
	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 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*ChangeEvent

A ChangeEvent object is available for each object that supports Change Data Capture. You can subscribe to a stream of change events using Change Data Capture to receive data tied to record changes in Salesforce. Changes include record creation, updates to an existing record, deletion of a record, and undeletion of a record. A change event isn't a Salesforce object—it doesn't support CRUD operations or queries. It's included in the object reference so you can discover which Salesforce objects support change events.

Supported Calls

`describeSObjects()`

Special Access Rules

- All objects may not be available in your org. Some objects require specific feature settings and permissions to be enabled.
- For more special access rules, if any, see the documentation for the standard object. For example, for AccountChangeEvent, see the special access rules for Account.

Change Event Support

Change events are available for all custom objects and a subset of standard objects. Change events that correspond to custom settings are partially supported. They aren't supported in Apex triggers but are supported in other types of subscribers. For more information about standard object support, see [Objects That Follow This Model](#).

Change Event Name

The name of a change event is based on the name of the corresponding object for which it captures the changes.

Standard Object Change Event Name

```
<Standard_Object_Name>ChangeEvent
```

Example: AccountChangeEvent

Custom Object Change Event Name

```
<Custom_Object_Name>__ChangeEvent
```

Example: MyCustomObject__ChangeEvent

Change Event Fields

The fields that a change event can include correspond to the fields on the associated parent Salesforce object, with a few exceptions. For example, AccountChangeEvent fields correspond to the fields on Account.

The fields that a change event doesn't include are:

- The `IsDeleted` system field.
- The `SystemModStamp` system field.
- Any field whose value isn't on the record and is derived from another record or from a formula, except roll-up summary fields, which are included. Examples are formula fields. Examples of fields with derived values include `LastActivityDate` and `PhotoUrl`.

Each change event also contains header fields. The header fields are included inside the `ChangeEventHeader` field. They contain information about the event, such as whether the change was an update or delete and the name of the object, like Account.

In addition to the event payload, the event schema ID is included in the `schema` field. Also included is the event-specific field, `replayId`, which is used for retrieving past events.

Event Message Example

The following example is an event message in JSON format for a new account record creation.

```
{
  "schema": "IeRuaY6cbI_HsV8Rv1Mc5g",
  "payload": {
    "ChangeEventHeader": {
      "entityName": "Account",
      "recordIds": [
        "<record_ID>"
      ],
      "changeType": "CREATE",
      "changeOrigin": "com/salesforce/api/soap/51.0;client=SfdcInternalAPI/",
      "transactionKey": "0002343d-9d90-e395-ed20-cf416ba652ad",
      "sequenceNumber": 1,
      "commitTimestamp": 1612912679000,
      "commitNumber": 10716283339728,
      "commitUser": "<User_ID>"
    },
    "Name": "Acme",
    "Description": "Everyone is talking about the cloud. But what does it mean?",
    "OwnerId": "<Owner_ID>",
    "CreatedDate": "2021-02-09T23:17:59Z",
    "CreatedById": "<User_ID>",
    "LastModifiedDate": "2021-02-09T23:17:59Z",
    "LastModifiedById": "<User_ID>"
  },
  "event": {
    "replayId": 6
  }
}
```

API Version and Schema

When you subscribe to change events, the subscription uses the latest API version and the event messages received reflect the latest field definitions. For more information, see [API Version and Event Schema](#) in the *Change Data Capture Developer Guide*.

Usage

For more information about Change Data Capture, see [Change Data Capture Developer Guide](#).

Objects That Follow This Model

The following object has associated `ChangeEvent` objects that follow this model.

- `AuthorizationFormConsent`
- `BusinessLicense`

StandardObjectNameFeed

StandardObjectNameFeed 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 *StandardObjectNameFeed* 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 <code>Type</code> is <code>TextPost</code>. Optional when <code>Type</code> is <code>ContentPost</code> or <code>LinkPost</code>.
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 <code>PartnerNetworkConnection</code> modifies a record that is tracked, the <code>CreatedBy</code> field contains the ID of the system administrator. The <code>ConnectionId</code> contains the ID of the <code>PartnerNetworkConnection</code>. 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 <code>InsertedBy</code> 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 <code>IsRichText</code> to <code>true</code> and escape HTML entities from the body. Otherwise, the post is rendered as plain text. Rich text supports the following HTML tags: • <code><p></code>  Tip: Though the <code>
</code> tag isn't supported, you can use <code><p>&nbsp;&nbsp;&nbsp;</p></code> to create lines. • <code><a></code> • <code></code> • <code><code></code> • <code><i></code> • <code><u></code> • <code><s></code> • <code></code> • <code></code> • <code></code> • <code></code> The <code></code> tag is accessible only through the API and must reference files in Salesforce similar to this example: <code></code>  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 <code>LinkPost</code> .
<code>NetworkScope</code>	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. <code>NetworkScope</code> can have the following values: • <code>NetworkId</code>—The ID of the Experience Cloud site in which the <code>FeedItem</code> is available. If left empty, the feed item is only available in the default Experience Cloud site. • <code>AllNetworks</code>—The feed item is available in all Experience Cloud sites. Note the following exceptions for <code>NetworkScope</code> : • Only feed items with a Group or User parent can set a <code>NetworkId</code> or a null value for <code>NetworkScope</code>. • For feed items with a record parent, users can set <code>NetworkScope</code> only to <code>AllNetworks</code>. • You can't filter a feed item on the <code>NetworkScope</code> field.
<code>ParentId</code>	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.
<code>RelatedRecordId</code>	Type reference Properties Group, Nillable, Sort Description ID of the <code>ContentVersion</code> record associated with a <code>ContentPost</code> . This field is null for all posts except <code>ContentPost</code> .
<code>Title</code>	Type string Properties Group, Nillable, Sort

Field	Details
	Description The title of the feed item. When the <code>Type</code> is <code>LinkPost</code> , the <code>LinkUrl</code> 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: • <code>ActivityEvent</code>—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 <code>CaseFeed</code> disabled, one event is generated for the series only. For a recurring Task with <code>CaseFeed</code> enabled, events are generated for the series and each occurrence. • <code>AdvancedTextPost</code>—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. • <code>AnnouncementPost</code>—Not used. • <code>ApprovalPost</code>—generated when a user submits an approval. • <code>BasicTemplateFeedItem</code>—Not used. • <code>CanvasPost</code>—a post made by a canvas app posted on a feed. • <code>CollaborationGroupCreated</code>—generated when a user creates a public group. • <code>CollaborationGroupUnarchived</code>—Not used. • <code>ContentPost</code>—a post with an attached file. • <code>CreatedRecordEvent</code>—generated when a user creates a record from the publisher. • <code>DashboardComponentAlert</code>—generated when a dashboard metric or gauge exceeds a user-defined threshold. • <code>DashboardComponentSnapshot</code>—created when a user posts a dashboard snapshot on a feed. • <code>LinkPost</code>—a post with an attached URL. • <code>PollPost</code>—a poll posted on a feed. • <code>ProfileSkillPost</code>—generated when a skill is added to a user's Chatter profile. • <code>QuestionPost</code>—generated when a user posts a question. • <code>ReplyPost</code>—generated when Chatter Answers posts a reply. • <code>RypplePost</code>—generated when a user creates a Thanks badge in WDC. • <code>TextPost</code>—a direct text entry on a feed. • <code>TrackedChange</code>—a change or group of changes to a tracked field. • <code>UserStatus</code>—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.

- AuthFormRequestRecordFeed
- AuthorizationFormTextFeed
- AwardFeed
- BankerFeed
- BatchJobFeed
- BatchJobPartFailedRecordFeed
- BatchJobPartFeed
- BranchUnitFeed
- BranchUnitBusinessMemberFeed
- BranchUnitCustomerFeed

- BusinessLicenseFeed
- BusinessMilestoneFeed
- BusinessProfileFeed
- ClaimCaseFeed
- ClaimFeed
- ClaimItemFeed
- ClaimParticipantFeed
- ClaimPayoutPlanFeed
- ClaimRecovery
- ClaimTeamMemberFeed
- ContractGroupPlanFeed
- ContractGroupPlanGroupClassFeed
- CoverageTypeFeed
- CustomerPropertyFeed
- CustomObjectParticipantFeed
- DocumentChecklistItemFeed
- FinancialDealAssetFeed
- FinancialDealBid
- FinancialDealInteractionFeed
- FinancialDealParticipantFeed
- FinancialDealPartyFeed
- FinancialDealProductFeed
- FinclDealInteractionSummaryFeed
- GroupCensusFeed
- GroupCensusMemberFeed
- GroupCensusMemberPlanFeed
- InfoAuthorizationRequestFeed
- InfoAuthRequestFormFeed
- InsPolicyTransactionDetailFeed
- InsuranceClaimAssetFeed
- InsuranceContractFeed
- InsurancePolicyAssetFeed
- InsurancePolicyCoverageFeed
- InsurancePolicyFeed
- InsurancePolicyMemberAssetFeed
- InsurancePolicyParticipantFeed
- InsuranceProfileFeed
- InteractionRelatedAccountFeed
- InteractionSumDiscussedAccountFeed
- LoanApplicantAddressFeed

- LoanApplicantDeclarationFeed
- LoanApplicantEmploymentFeed
- LoanApplicantFeed
- LoanApplicantIncomeFeed
- LoanApplicationAssetFeed
- LoanApplicationFinancialFeed
- LoanApplicationLiabilityFeed
- LoanApplicationPropertyFeed
- LoanApplicationTitleHolderFeed
- MultipartyInfoAuthRequestFeed
- PartyCertifiedCapacityFeed
- PartyIdentityVerificationFeed
- PartyIdentityVerificationStepFeed
- PartyProfileFeed
- PartyProfileAddressFeed
- PartyProfileRiskFeed
- PartyScreeningStepFeed
- PartyScreeningSummaryFeed
- PaymentRequest
- PaymentRequestLine
- PersonLifeEventFeed
- ProducerFeed
- ProducerPolicyAssignmentFeed
- ProductCoverageFeed
- QuoteLineItemGroupClassFeed
- RecordAlertFeed
- ResidentialLoanApplicationFeed
- SecuritiesHoldingFeed
- TagCategoryFeed
- WorkerCompCoverageClassFeed

StandardObjectNameHistory

StandardObjectNameHistory 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 *StandardObjectNameHistory* 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
<i>StandardObjectId</i>	Type reference Properties Filter, Group, Sort Description ID of the standard object.
<i>DataType</i>	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Data type of the field that was changed.
<i>Field</i>	Type picklist Properties Filter, Group, Restricted picklist, Sort Description Name of the field that was changed.
<i>NewValue</i>	Type anyType Properties Nillable, Sort Description New value of the field that was changed.
<i>OldValue</i>	Type anyType

Field Name	Details
	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.

- AuthFormRequestRecordHistory
- AuthorizationFormConsentHistory
- AuthorizationFormHistory
- AuthorizationFormTextHistory
- AwardHistory
- BankerHistory
- BatchJobHistory
- BatchJobPartFailedRecordHistory
- BatchJobPartHistory
- BranchUnitHistory
- BranchUnitBusinessMemberHistory
- BranchUnitCustomerHistory
- BusinessLicenseHistory
- BusinessMilestoneHistory
- BusinessProfileHistory
- ClaimCaseHistory
- ClaimHistory
- ClaimItemHistory
- ClaimParticipantHistory
- ClaimPayoutPlanHistory
- ClaimRecovery
- ClaimTeamMemberHistory
- ContractGroupPlanHistory
- ContractGroupPlanGroupClassHistory
- CoverageTypeHistory
- CustomerPropertyHistory
- CustomObjectParticipantHistory
- DataUsePurposeHistory
- DocumentChecklistItemHistory
- FinancialDealInteractionHistory

- FinancialDealAssetHistory
- FinancialDealBidHistory
- FinancialDealParticipantHistory
- FinancialDealPartyHistory
- FinancialDealProductHistory
- FinclDealInteractionSummaryHistory
- GroupCensusHistory
- GroupCensusMemberHistory
- GroupCensusMemberPlanHistory
- GroupClassHistory
- GroupClassContributionHistory
- InfoAuthorizationRequestHistory
- InfoAuthRequestFormHistory
- InsPolicyTransactionDetailHistory
- InsuranceClaimAssetHistory
- InsuranceContractHistory
- InsurancePolicyAssetHistory
- InsurancePolicyCoverageHistory
- InsurancePolicyHistory
- InsurancePolicyMemberAssetHistory
- InsurancePolicyParticipantHistory
- InsuranceProfileHistory
- InteractionRelatedAccountHistory
- InteractionSumDiscussedAccountHistory
- LoanApplicantAddressHistory
- LoanApplicantAssetHistory
- LoanApplicantDeclarationHistory
- LoanApplicantEmploymentHistory
- LoanApplicantHistory
- LoanApplicantIncomeHistory
- LoanApplicantLiabilityHistory
- LoanApplicationAssetHistory
- LoanApplicationFinancialHistory
- LoanApplicationLiabilityHistory
- LoanApplicationPropertyHistory
- LoanApplicationTitleHolderHistory
- MultipartyInfoAuthRequestHistory
- PartyCertifiedCapacityHistory
- PartyIdentityVerificationHistory
- PartyIdentityVerificationStepHistory

- PartyProfileHistory
- PartyProfileAddressHistory
- PartyProfileRiskHistory
- PartyScreeningStepHistory
- PartyScreeningSummaryHistory
- PaymentRequest
- PaymentRequestLine
- PersonEducationHistory
- PersonLifeEventHistory
- ProducerHistory
- ProducerPolicyAssignmentHistory
- ProductCoverageHistory
- QuoteLineItemGroupClassHistory
- RecordAlertHistory
- ResidentialLoanApplicationHistory
- SecuritiesHoldingHistory
- TagCategoryHistory
- UserFinancialAuthority
- WorkerCompCoverageClassHistory

*StandardObjectName*OwnerSharingRule

StandardObjectNameOwnerSharingRule 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 *StandardObjectNameOwnerSharingRule* 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 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 <code>DeveloperName</code> for each record. If no <code>DeveloperName</code> is specified, performance slows down 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.

Field Name	Details
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 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
- BankerOwnerSharingRule
- BranchUnitOwnerSharingRule
- BusinessLicenseOwnerSharingRule
- ClaimOwnerSharingRule
- ClaimRecovery
- ContractGroupPlanGroupClassOwnerSharingRule
- CoverageTypeOwnerSharingRule
- CustomerPropertyOwnerSharingRule
- DocumentChecklistItemOwnerSharingRule
- FinancialDealOwnerSharingRule
- FinancialDealPartyOwnerSharingRule
- FinancialDealProductOwnerSharingRule
- GroupCensusOwnerSharingRule
- InsuranceContractOwnerSharingRule
- InsurancePolicyAssetOwnerSharingRule
- InsurancePolicyOwnerSharingRule
- InteractionOwnerSharingRule
- InteractionSummaryOwnerSharingRule
- LoanApplicantDeclarationOwnerSharingRule

- LoanApplicantEmploymentOwnerSharingRule
- LoanApplicantIncomeOwnerSharingRule
- LoanApplicantOwnerSharingRule
- LoanApplicationAssetOwnerSharingRule
- LoanApplicationLiabilityOwnerSharingRule
- PartyCertifiedCapacityOwnerSharingRule
- PaymentRequest
- PersonEducationOwnerSharingRule
- PersonLifeEventOwnerSharingRule
- ProducerOwnerSharingRule
- ProducerPolicyAssignmentOwnerSharingRule
- ProductCoverageOwnerSharingRule
- ResidentialLoanApplicationOwnerSharingRule
- SecuritiesHoldingOwnerSharingRule
- UserFinancialAuthority
- WorkerCompCoverageClassOwnerSharingRule

StandardObjectNameShare

StandardObjectNameShare 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 *StandardObjectNameShare* 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()`, `describeObjects()`, `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

Field Name	Details
	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
- AuthorizationFormConsentShare
- AuthorizationFormShare
- AwardShare
- BankerShare
- BranchUnitShare
- BusinessLicenseShare
- ClaimRecovery
- ClaimShare

- ContractGroupPlanGroupClassShare
- CoverageTypeShare
- CustomerPropertyShare
- CustomObjectParticipantShare
- DataUsePurposeShare
- DocumentChecklistItemShare
- FinancialDealShare
- FinancialDealPartyShare
- FinancialDealProductShare
- GroupCensusShare
- InfoAuthorizationRequestShare
- InsuranceContractShare
- InsurancePolicyAssetShare
- InsurancePolicyShare
- InteractionShare
- InteractionSummaryShare
- LoanApplicantDeclarationShare
- LoanApplicantEmploymentShare
- LoanApplicantIncomeShare
- LoanApplicantShare
- LoanApplicationAssetShare
- LoanApplicationLiabilityShare
- MultipartyInfoAuthRequestShare
- PartyCertifiedCapacityShare
- PartyIdentityVerificationShare
- PartyProfileShare
- PartyProfileAddressShare
- PartyProfileRiskShare
- PartyScreeningSummaryShare
- PaymentRequest
- PersonEducationShare
- PersonLifeEventShare
- ProducerPolicyAssignmentShare
- ProducerShare
- ProductCoverageShare
- RecordAlertShare
- ResidentialLoanApplicationShare
- SecuritiesHoldingShare
- TagCategoryShare
- UserFinancialAuthority

- WorkerCompCoverageClassShare

APEX REFERENCE

This Apex reference goes into detail about the built-in Apex `ConnectApi` classes and interfaces.

For Apex-related objects and SOAP API calls, see [Objects and SOAP API Calls and Headers for Apex](#) in the *SOAP API Developer Guide*.

[ConnectApi Namespace](#)

The `ConnectApi` namespace (also called Connect in Apex) provides classes for accessing the same data available in Connect REST API. Use Connect in Apex to create custom experiences in Salesforce.

[commonserviceexcellence Namespace](#)

The `commonserviceexcellence` namespace provides classes used in financial account FlexCards.

[fscserviceprocesses Namespace](#)

The `fscserviceprocesses` namespace provides classes used in Service Process OmniScripts.

[fscwmgen Namespace](#)

The `fscwmgen` namespace provides an interface used for Record Alerts.

ConnectApi Namespace

The `ConnectApi` namespace (also called Connect in Apex) provides classes for accessing the same data available in Connect REST API. Use Connect in Apex to create custom experiences in Salesforce.

For information about working with the `ConnectApi` classes, see [Connect in Apex](#).

[RecordAlert Methods](#)

These are `RecordAlert` methods for Financial Services Cloud.

[Output Classes](#)

These are Record Alerts Apex output classes.

[ConnectApi Enums](#)

Enums specific to the `ConnectApi` namespace.

RecordAlert Methods

These are `RecordAlert` methods for Financial Services Cloud.

[getRecordAlertsForFinancialAccount\(financialAccountId\)](#)

Retrieve a list of active record alerts on financial accounts.

[getRecordAlertsForPersonAccount\(personId\)](#)

Retrieve a list of active record alerts on person accounts.

getRecordAlertsForFinancialAccount (financialAccountId)

Retrieve a list of active record alerts on financial accounts.

API Version

54.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertCollectionRepresentation  
getRecordAlertsForFinancialAccount (String financialAccountId)
```

Parameters

financialAccountId

Type: String

The financial account record ID.

Return Value

Type: [ConnectApi.RecordAlertCollection](#)

getRecordAlertsForPersonAccount (personId)

Retrieve a list of active record alerts on person accounts.

API Version

54.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertCollectionRepresentation  
getRecordAlertsForPersonAccount (String personId)
```

Parameters

personId

Type: String

The person account record ID.

Return Value

Type: [ConnectApi.RecordAlertCollection](#)

Output Classes

These are Record Alerts Apex output classes.

[ConnectApi.RecordAlertCollection](#)

Representation of a collection of record alerts.

[ConnectApi.RecordAlert](#)

Representation of the details of a record alert.

[ConnectApi.RecordAlertActionInfoCollection](#)

Representation of the details of an action on the record alert.

[ConnectApi.RecordAlertActionInfo](#)

Representation of the information of the record alert action.

ConnectApi.RecordAlertCollection

Representation of a collection of record alerts.

Property Name	Type	Description	Available Version
recordAlerts	List< ConnectApi.RecordAlert >	Represents the details of a record alert.	54.0

ConnectApi.RecordAlert

Representation of the details of a record alert.

Property Name	Type	Description	Available Version
actions	ConnectApi.RecordAlertActionInfoCollection	Represents the details of an action taken on a record alert.	54.0
active	Boolean	Indicates whether a record alert is active (<code>true</code>) or not (<code>false</code>).	54.0
description	String	The description of a record alert.	54.0
effectiveDate	Datetime	The start date and time from when an active record alert is in effect.	54.0
id	String	The record alert ID.	54.0
parentId	String	The parent ID of a record alert.	54.0
recordAlertCategoryName	String	The category name of a record alert.	54.0

Property Name	Type	Description	Available Version
severity	ConnectApi. RecordAlertSeverityType	Indicates the degree of impact of a record alert. Possible values are: - Error - Info - Warning	54.0
source	ConnectApi. RecordAlertSourceTypeEnum	Identifies the source system that generated the record alert. Possible values are: - Apex - Internal	54.0
sourceSystemId	String	The ID of the source system that this record alert was sourced from.	54.0
subject	String	The subject line of a record alert.	54.0
validUntilDate	Datetime	The date and time from when a record alert is no longer valid.	54.0
whatId	String	The Salesforce object record ID on which a record alert is created.	54.0

ConnectApi.RecordAlertActionInfoCollection

Representation of the details of an action on the record alert.

Property Name	Type	Description	Available Version
actionInfoCollection	List< ConnectApi.RecordAlertActionInfo >	Represents the action details of a record alert.	54.0

ConnectApi.RecordAlertActionInfo

Representation of the information of the record alert action.

Property Name	Type	Description	Available Version
actionName	String	The name of the action performed on a record alert. Possible values are: - Dismiss - Snooze	54.0
parameters	List<String>	List of parameters specified for the record alert action.	54.0

ConnectApi Enums

Enums specific to the `ConnectApi` namespace.

`ConnectApi` enums inherit all properties and methods of Apex enums.

Enums are not versioned. Enum values are returned in all API versions. Clients should handle values they don't understand gracefully.

Enum	Description
<code>ConnectApi.RecordAlertSourceTypeEnum</code>	Type of source system. • <code>Apex</code> • <code>Internal</code>
<code>ConnectApi.RecordAlertSeverityType</code>	Type of severity. • <code>Error</code> • <code>Info</code> • <code>Warning</code>

commonserviceexcellence Namespace

The `commonserviceexcellence` namespace provides classes used in financial account FlexCards.



Note: The `commonserviceexcellence` namespace cannot be used in DML operations.

The following are the classes in the `commonserviceexcellence` namespace.

[IntegrationHandler Class](#)

Use the callable `IntegrationHandler` class to fetch financial transaction data.

IntegrationHandler Class

Use the callable `IntegrationHandler` class to fetch financial transaction data.

Namespace

`commonserviceexcellence`

Usage

The `ServiceExcellenceAlertCard` and `ServiceExcellenceGenericAlertCard` have Integration Procedure data sources that call the `IntegrationHandler` class. These FlexCards display information about financial accounts.

All of the `IntegrationHandler` methods reference an Integration Definition configured in Setup. Some methods reference the **Fetch Real Time Financial Account Info** preference in Setup.

[IntegrationHandler Methods](#)

IntegrationHandler Methods

The following are methods for `IntegrationHandler`. You can use the `call` method to invoke the `executeOmniCallback` or `getOmniContinuation` method, or you can invoke those methods directly.

`call(action, args)`

This method calls one of the available `IntegrationHandler` actions and passes arguments to that action.

`executeCallout(requestId, payload, devName)`

Calls the provider class defined in the `Integration Definition` record referenced by the `devName` parameter. The `Industries: SendApex Async Request` invocable action calls this method.

`executeLightningCallback(labels, state)`

Calls back the method that is called automatically after the `Continuation` from `getLightningContinuation` is executed. Internally calls the `callback` method of the provider.

`executeOmniCallback(input, output, options)`

Calls back the method that is called automatically after the `Continuation` from `getOmniContinuation` is executed. Internally calls the `callback` method of the provider.

`getLightningContinuation(requestId, params, devName, input)`

Gets the `Continuation` object returned by the provider defined in the `Integration Definition` record referenced by the `devName` parameter.

`getOmniContinuation(requestId, params, options, devName, input)`

Gets the `Continuation` object returned by the provider defined in the `Integration Definition` record referenced by the `devName` parameter.

call(action, args)

This method calls one of the available `IntegrationHandler` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: `String`

The action to call. The value must be one of the following method names:

- `executeOmniCallback` — Invokes the `executeOmniCallback` method.
- `getContinuation` — Invokes the `getOmniContinuation` method.
- `getTransactionProperties` — Checks if the org has the **Fetch Real Time Financial Account Info** preference set to on. If the preference is on, FlexCards display data from the core banking system.

args

Type: `Map<String, Object>`

The first three keys must be `input`, `output`, and `options`. The required keys under `input` depend on the method the action invokes. For the `getTransactionProperties` action, provide empty `input`, `output`, and `options` keys.

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

The getTransactionProperties action returns the orgHasFetchFAInfo property, which is true or false based on whether the **Fetch Real Time Financial Account Info** preference is on or off.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

executeCallout(requestId, payload, devName)

Calls the provider class defined in the Integration Definition record referenced by the devName parameter. The Industries: SendApex Async Request invocable action calls this method.

Signature

```
global static IntegrationCalloutResponse executeCallout(String requestId, String payload, String devName)
```

Parameters

requestId

Type: String

Represents a unique ID string that identifies the record containing the input data to the API call.

payload

Type: String

Represents any string that needs to be passed directly to the provider.

devName

Type: String

Represents the Developer Name of the Integration Definition record.

Return Value

Returns the IntegrationCalloutResponse object, which contains the following properties:

- Boolean isSuccess — Indicates if the API call was successful.
- Map<String, Object> returnValue — Response from the API call after the callback method has processed the response.
- String error — Contains the error message in case of an error.

executeLightningCallback(labels, state)

Calls back the method that is called automatically after the Continuation from getLightningContinuation is executed. Internally calls the callback method of the provider.

Signature

```
global static Object executeLightningCallback(List<String> labels, Map<String, Object> state)
```

Parameters

labels

Type: List<String>

Represents a list of label strings for retrieving the callout responses.

state

Type: Map<String, Object>

Represents a map with the request ID, provider key, and Continuation state.

Return Value

Returns one of the following:

- If successful, returns a Map<String, Object> response from the API call after the callback method has processed the response.
- If unsuccessful, returns a String value containing the error message.

Usage

This method isn't meant to be called directly — the LWC framework calls it automatically.

executeOmniCallback(input, output, options)

Calls back the method that is called automatically after the Continuation from getOmniContinuation is executed. Internally calls the callback method of the provider.

Signature

```
global static Object executeOmniCallback(Map<String, Object> input, Map<String, Object> output, Map<String, Object> options)
```

Parameters

input

Type: Map<String, Object>

Represents the original input that was passed into getOmniContinuation method.

output

Type: Map<String, Object>

Represents the output from the API call.

options

Type: Map<String, Object>

Represents parameters passed by OmniStudio.

Return Value

Returns the `IntegrationCalloutResponse` object, which contains the following properties:

- Boolean `isSuccess` — Indicates if the API call was successful.
- `Map<String, Object> returnValue` — Response from the API call after the callback method has processed the response.
- String `error` — Contains the error message in case of an error.

Usage

This method isn't meant to be called directly — the [OmniContinuation](#) framework calls it automatically.

getLightningContinuation(requestId, params, devName, input)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the `devName` parameter.

Signature

```
global static Continuation getLightningContinuation(String requestId, Map<String, String> params, String devName, Map<String, Object> input)
```

Parameters

requestId

Type: String

Represents a unique ID string that identifies the request.

params

Type: Map<String, String>

Represents parameters passed directly to the provider class.

devName

Type: String

Represents the Developer Name of the Integration Definition record.

input

Type: Map<String, Object>

If the Integration Definition references an external service, the input parameter contains the following properties:

- InputRecordId — ID of the record containing the input data to the API call.
- OutputRecordId — ID of the record to which output data from the API call is written.

Return Value

Returns the [Continuation](#) object.

Usage

To use this class:

1. Create a provider class or preprocessor and postprocessor OmniStudio assets.
2. Define an Integration Definition record in Setup.

3. Call this method to get the Continuation to call from the LWC component.

getOmniContinuation(requestId, params, options, devName, input)

Gets the Continuation object returned by the provider defined in the Integration Definition record referenced by the devName parameter.

Signature

```
global static Continuation getOmniContinuation(String requestId, Map<String, String>
params, Map<String, Object> options, String devName, Map<String, Object> input)
```

Parameters

requestId

Type: String

Represents a unique ID string that identifies the request.

params

Type: Map<String, String>

Represents parameters passed directly to the provider class.

options

Type: Map<String, Object>

Represents parameters passed by OmniStudio.

devName

Type: String

Represents the Developer Name of the Integration Definition record.

input

Type: Map<String, Object>

If the Integration Definition references an external service, the input parameter contains the following properties:

- InputRecordId — ID of the record containing the input data to the API call.
- OutputRecordId — ID of the record to which output data from the API call is written.

Return Value

Returns the [Continuation](#) object.

Usage

To use this class:

1. Create a provider class that implements the ServiceIntegrationProvider interface, or create preprocessor and postprocessor OmniStudio assets.
2. Define an Integration Definition record in Setup.
3. Call this method to get the Continuation to call from an Integration Procedure.

fscserviceprocesses Namespace

The `fscserviceprocesses` namespace provides classes used in Service Process OmniScripts.



Note: The `fscserviceprocesses` namespace cannot be used in DML operations.

The following are the classes in the `fscserviceprocesses` namespace.

[AddressUpdateHelperFunctions Class](#)

The callable `AddressUpdateHelperFunctions` class provides data conversion functions for use in the Change Address OmniScript.

[FeeReversalHelperFunctions Class](#)

The callable `FeeReversalHelperFunctions` class provides data conversion functions for use in the Fee Reversal OmniScript. This class accepts a list of transactions from the related Fee Reversal Case Object and the corresponding Fee Reversal amounts as inputs and calls the Fee Reversal Mule API endpoint.

AddressUpdateHelperFunctions Class

The callable `AddressUpdateHelperFunctions` class provides data conversion functions for use in the Change Address OmniScript.

Namespace

`fscserviceprocesses`

Usage

The `AddressUpdateHelperFunctions` class is a helper function for the GET and POST methods of the `SvcCatalogRequest Connect` API. The Change Address OmniScript calls Integration Procedures that call the `AddressUpdateHelperFunctions` methods via Remote Actions.

[AddressUpdateHelperFunctions Methods](#)

AddressUpdateHelperFunctions Methods

The following are methods for `AddressUpdateHelperFunctions`.

`call(action, args)`

This method calls one of the available `AddressUpdateHelperFunctions` actions and passes arguments to that action.

`call(action, args)`

This method calls one of the available `AddressUpdateHelperFunctions` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of the following:

- *getAddressUpdateAttrs* — Fetches the list of Service Process attributes for the Address Update request.
- *convertArrayToKeyValuePairs* — Converts the formats of Financial Account numbers.
- *ConvertToList* — Converts document type data to list format.
- *convertAndMergeAccounts* — Converts Financial Account data to list format.
- *convertUploadedDocuments* — Converts uploaded files metadata json for OS.
- *ifUploadContainsMultipleFiles* — Indicates if a single file input element in OS contains multiple uploads.
- *convertAddresses* — Converts the account level addresses to consumable format for the OmniScript.
- *callCreateCaseApi* — Creates a new Case and a related Service Process record with the address data.

args

Type: Map<String, Object>

The first three keys must be input, output, and options. The required content for each depends on the action:

- *getAddressUpdateAttrs*
 - String svcCatalogRequestId — Id of the request created using the Address Update OmniScript.
- *convertArrayToKeyValuePairs*
 - List<Object> financialAccountsObj — List of financial account objects for transformation.
- *ConvertToList*
 - Object args — String of comma-separated document types.
- *convertAndMergeAccounts*
 - List<Object> args — list of financial accounts.
- *convertUploadedDocuments*
 - List<Object> args — list of uploaded documents from the OmniScript data.
- *ifUploadContainsMultipleFiles*
 - List<Object> args — list of uploaded documents from the OmniScript data.
- *convertAddresses*
 - Map<String,Object> args — Account level addresses.
- *callCreateCaseApi*
 - Map<String,Object>

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

Examples

Input and output JSON examples for some of the actions are as follows.

convertArrayToKeyValuePairs

Input format:

```
[
  {
    "AccountName": "Priority Checking",
    "Address1": "33 Ridgemon Street",
    "City": "San Fransisco",
    "FinancialAccountId": "a0FRN000000Dt6C2AS",
    "PostalCode": "512534",
    "Country": "United States",
    "State": "CA",
    "FinancialAccountNumber": "700021878"
  },
  {
    "AccountName": "Cash Rewards Credit Card",
    "Address1": "91 Town Road",
    "City": "Naples",
    "FinancialAccountId": "a0FRN000000Dt7Z2AS",
    "PostalCode": "514534",
    "Country": "United State",
    "State": "Florisa",
    "FinancialAccountNumber": "78000130"
  },
  {
    "AccountName": "Regular Savings",
    "Address1": "33 Ridgemon Street",
    "City": "San Fransisco",
    "FinancialAccountId": "a0FRN000000Dt7U2AS",
    "PostalCode": "51345",
    "Country": "United States",
    "State": "CA",
    "FinancialAccountNumber": "200048376"
  }
]
```

Output format:

```
[
  {
    "isSelected": null,
    "ConvertedFinancialAccountNumber": "1878",
    "FinancialAccountNumber": "700021878",
    "State": "CA",
    "Country": "United States",
    "PostalCode": "512534",
```

```

        "FinancialAccountId": "a0FRN000000Dt6C2AS",
        "City": "San Fransisco",
        "Address1": "33 Ridgemon Street",
        "AccountName": "Priority Checking"
    },
    {
        "isSelected": null,
        "ConvertedFinancialAccountNumber": "0130",
        "FinancialAccountNumber": "78000130",
        "State": "Florisa",
        "Country": "United State",
        "PostalCode": "514534",
        "FinancialAccountId": "a0FRN000000Dt7Z2AS",
        "City": "Naples",
        "Address1": "91 Town Road",
        "AccountName": "Cash Rewards Credit Card"
    },
    {
        "isSelected": null,
        "ConvertedFinancialAccountNumber": "8376",
        "FinancialAccountNumber": "200048376",
        "State": "CA",
        "Country": "United States",
        "PostalCode": "51345",
        "FinancialAccountId": "a0FRN000000Dt7U2AS",
        "City": "San Fransisco",
        "Address1": "33 Ridgemon Street",
        "AccountName": "Regular Savings"
    }
}

```

convertAndMergeAccounts

Input format:

```

[
    {
        "Id": "REC0",
        "isSelected": true,
        "ConvertedFinancialAccountNumber": "1878",
        "FinancialAccountNumber": "700021878",
        "State": "CA",
        "Country": "United States",
        "PostalCode": "512534",
        "FinancialAccountId": "a0FRN000000Dt6C2AS",
        "City": "San Fransisco",
        "Address1": "33 Ridgemon Street",
        "AccountName": "Priority Checking",
        "uniqueKey": "REC0",
        "_flex": {
            "uniqueKey": "REC0"
        }
    },
    {
        "Id": "REC1",

```

```

        "isSelected": true,
        "ConvertedFinancialAccountNumber": "0130",
        "FinancialAccountNumber": "78000130",
        "State": "Florisa",
        "Country": "United State",
        "PostalCode": "514534",
        "FinancialAccountId": "a0FRN000000Dt7Z2AS",
        "City": "Naples",
        "Address1": "91 Town Road",
        "AccountName": "Cash Rewards Credit Card",
        "uniqueKey": "REC1",
        "_flex": {
            "uniqueKey": "REC1"
        }
    }
]

```

Output format:

```

[
    "700021878",
    "78000130"
]

```

convertAddresses

Input format:

```

{
    "Name": "Julia Green",
    "ShippingAddress": "33 Ridgemonnd Street,San Fransisco,CA,613654,United States",
    "BillingAddress": "33 Ridgemonnd Street,San Fransisco,CA,67136,United States"
}

```

Output format:

```

[
    {
        "isSelected": null,
        "type": "Shipping",
        "Address": "33 Ridgemonnd Street San Fransisco CA 613654 United States"
    },
    {
        "isSelected": null,
        "type": "Billing",
        "Address": "33 Ridgemonnd Street San Fransisco CA 67136 United States"
    }
]

```

convertUploadedDocuments

Input format:

```

[
    {
        "DocumentType-Block": {
            "DocumentType": "Passport"
        }
    }
]

```

```

    },
    "Files": [
      {
        "data": "069RN0000003301YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q3YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  },
  {
    "DocumentType-Block": {
      "DocumentType": "Medicard"
    },
    "Files": [
      {
        "data": "069RN0000003306YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q8YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  }
]

```

Output format:

```

[
  {
    "typeId": "0deRN000000009UYAQ",
    "docType": "Passport",
    "name": "Passport.pdf",
    "id": "069RN0000003301YAI"
  },
  {
    "typeId": "0deRN00000000CnYAI",
    "docType": "Medicard",
    "name": "Passport.pdf",
    "id": "069RN0000003306YAI"
  }
]

```

ifUploadContainsMultipleFiles

Input format:

```

[
  {
    "DocumentType-Block": {
      "DocumentType": "Passport"
    },
    "Files": [
      {
        "data": "069RN0000003301YAI",

```

```

        "filename": "Passport.pdf",
        "vId": "068RN00000038q3YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
    }
  ],
  {
    "DocumentType-Block": {
      "DocumentType": "Medicard"
    },
    "Files": [
      {
        "data": "069RN0000003306YAI",
        "filename": "Passport.pdf",
        "vId": "068RN00000038q8YAA",
        "size": 5385,
        "deleteLabel": "Delete Passport.pdf"
      }
    ]
  }
]

```

Output format: None

callCreateCaseApi

The input map contains these key-value pairs:

```

AddressLine1 (String): "32 baker street"
AddressLine2 (String): "abc"
PostalCode: 63164
City: "San Francisco"
State: "CA"
CountryCode: "United States"
accountId: "001RN00000037rzqYAA"
effectiveDate: "2022-12-31"
svcCatalogItemDefApiName: "AddressUpdate"
defaultAccountStatus:
caseSubject: "Address Update Service Request"

```

FinancialAccounts input format:

```

[
  {
    "Id": "REC0",
    "isSelected": true,
    "ConvertedFinancialAccountNumber": "1878",
    "FinancialAccountNumber": "700021878",
    "State": "CA",
    "Country": "United States",
    "PostalCode": "512534",
    "FinancialAccountId": "a0FRN000000Dt6C2AS",
    "City": "San Fransisco",
    "Address1": "33 Ridgemonnd Street",
    "AccountName": "Priority Checking",

```



```

    "uniqueKey": "REC0",
    "_flex": {
      "uniqueKey": "REC0"
    }
  },
  {
    "Id": "REC1",
    "isSelected": true,
    "ConvertedFinancialAccountNumber": "0130",
    "FinancialAccountNumber": "78000130",
    "State": "Florida",
    "Country": "United States",
    "PostalCode": "514534",
    "FinancialAccountId": "a0FRN000000Dt7Z2AS",
    "City": "Naples",
    "Address1": "91 Town Road",
    "AccountName": "Cash Rewards Credit Card",
    "uniqueKey": "REC1",
    "_flex": {
      "uniqueKey": "REC1"
    }
  }
]

```

customerLevelAddresses input format:

```

[
  {
    "Id": "REC0",
    "isSelected": true,
    "type": "Shipping",
    "Address": "33 Ridgemoond Street San Fransisco CA 613654 United State",
    "uniqueKey": "REC0",
    "_flex": {
      "uniqueKey": "REC0"
    }
  },
  {
    "Id": "REC1",
    "isSelected": true,
    "type": "Billing",
    "Address": "33 Ridgemoond Street San Fransisco CA 67136 United State",
    "uniqueKey": "REC1",
    "_flex": {
      "uniqueKey": "REC1"
    }
  }
]

```

documentInfo input format:

```

[
  {
    "typeId": "0deRN000000009UYAQ",
    "docType": "Passport",

```

```

    "name": "Passport.pdf",
    "id": "069RN0000003301YAI"
  },
  {
    "typeId": "0deRN00000000CnYAI",
    "docType": "Medicard",
    "name": "Passport.pdf",
    "id": "069RN0000003306YAI"
  }
]

```

Output format: None

FeeReversalHelperFunctions Class

The callable `FeeReversalHelperFunctions` class provides data conversion functions for use in the Fee Reversal OmniScript. This class accepts a list of transactions from the related Fee Reversal Case Object and the corresponding Fee Reversal amounts as inputs and calls the Fee Reversal Mule API endpoint.

Namespace

[fscserviceprocesses](#)

Usage

The `FeeReversalHelperFunctions` class is a helper function for the GET and POST methods of the `SvcCatalogRequest Connect` API. The Fee Reversal OmniScript calls Integration Procedures that call the `FeeReversalHelperFunctions` methods via Remote Actions.

[FeeReversalHelperFunctions Methods](#)

FeeReversalHelperFunctions Methods

The following are methods for `FeeReversalHelperFunctions`.

[call\(action, args\)](#)

This method calls one of the available `FeeReversalHelperFunctions` actions and passes arguments to that action.

call(action, args)

This method calls one of the available `FeeReversalHelperFunctions` actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of the following:

- *getFeeReversalAttributes* — Fetches the list of Service Process attributes for the Fee Reversal request.
- *callCreateCaseApi* — Creates a new Case and a related Service Process record with the transaction data.

args

Type: Map<String, Object>

The first three keys must be input, output, and options. The required content for each depends on the action:

- *getFeeReversalAttributes*
 - String caseld — Id of the Case created using the Fee Reversal OmniScript.
- *callCreateCaseApi*
 - Map<String, Object>

Return Value

Type: Map<String, Object>

The return values of the corresponding action.

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

Examples

Input and output JSON examples for some of the actions are as follows.

getFeeReversalAttributes

Input format:

```
{"caseId": "500RM000003rQu1YAE"}
```

Output format:

```
{
  "caseRequestAttr": {
    "FinancialAccountId": "a0URM0000004OCM2A2",
    "Transactions": [
      {
        "frt_reversal_transaction_description": "Reverse Cheque book charge",
        "frt_reversal_amount_currency": "USD",
        "frt_reversal_percentage": 100,
        "frt_transaction_id": "12",
        "frt_reversal_error_reason": null,
        "frt_override_percentage": 80,
        "frt_reversal_transaction_amount": 40,
        "groupCorrelationNumber": 1,
        "frt_transaction_code": "54",
        "frt_override_amount_currency": "USD",
        "frt_transaction_posted_date": "2022-11-11T12:53:14.000Z",
        "frt_fee_type": "Cheque book charge",

```

```

        "override_percentage_formatted": "80.0%",
        "frt_override_amount": 40,
        "frt_transaction_amount_currency": "USD",
        "frt_transaction_description": "Fee charge for Cheque book",
        "frt_reversal_transaction_posted_date": "2022-11-15T20:20:20.000Z",
        "reversal_percentage_formatted": "100.0%",
        "frt_transaction_amount": 50,
        "frt_reversal_amount": 50,
        "frt_reversal_transaction_id": "1001116623",
        "frt_reversal_transaction_amount_currency": null
    }
}
}
}

```

callCreateCaseApi

Input format:

```

{
  "attributes": {
    "data": {
      "financial_account_id_1": {
        "value": "accountId"
      },
      "source_system_id_1": {
        "value": "100"
      },
      "reversal_reason_1": {
        "value": null
      },
      "fee_reversal_transactions_1": {
        "value": [
          {
            "frt_transaction_id_1": "12",
            "frt_transaction_posted_date_1": "2022-11-11T12:53:14.924Z",
            "frt_transaction_amount_1": 50,
            "frt_transaction_amount_currency_1": "USD",
            "frt_fee_type_1": "Check book charge",
            "frt_transaction_code_1": "54",
            "frt_reversal_amount_currency_1": null,
            "frt_reversal_amount_1": null,
            "frt_reversal_percentage_1": null,
            "frt_override_amount_currency_1": null,
            "frt_override_amount_1": null,
            "frt_override_percentage_1": null,
            "frtr_transaction_id_1": null,
            "frtr_transaction_posted_date_1": null,
            "frtr_transaction_description_1": null,
            "frtr_transaction_amount_1": null,
            "frtr_transaction_amount_currency_1": null,
            "frtr_error_reason_1": null
          }
        ]
      }
    }
  },
}

```

```

    "reversal_summary_1": {
      "value": {
        "reversal_transaction_status_1": null
      }
    }
  },
  "svcCatalogItemDefApiName": "Fee_Reversal_Test_2",
  "caseInfo": {
    "data": {
      "Subject": {
        "value": "Check book charge reversal"
      },
      "Origin": {
        "value": "Phone"
      }
    }
  }
}

```

Output format:

```

{
  "svcCatalogRequestId": "946xx000000009hEAA",
  "caseId": "500xx000000cd69AAA",
  "caseNumber": "00001032"
}

```

fscwmgen Namespace

The `fscwmgen` namespace provides an interface used for Record Alerts.



Note: The `RecordAlertProvider` namespace cannot be used in DML operations.

The following are the classes in the `fscwmgen` namespace.

[RecordAlertActionInfo Class](#)

Represents information about the action taken on the record alert.

[RecordAlertInfo Class](#)

Represents details about the record alert.

[RecordAlertProvider Interface](#)

Implement this interface to provide record alerts and to perform actions on the record alerts.

[RecordAlertsWrapper Class](#)

Use the callable `RecordAlertsWrapper` class to fetch Record Alert data. For Financial Services Cloud, you can group the results by Financial Account and Record Alert Category.

RecordAlertActionInfo Class

Represents information about the action taken on the record alert.

Namespace

fscwmgen

[RecordAlertActionInfo Properties](#)

RecordAlertActionInfo Properties

The following are properties for `RecordAlertActionInfo`.

[actionName](#)

The name of the action performed on a record alert.

[parameters](#)

List of parameters specified for the record alert action.

actionName

The name of the action performed on a record alert.

The following are the valid values:

- dismiss
- snooze

Signature

```
public String actionName {get; set;}
```

Property Value

Type: String

parameters

List of parameters specified for the record alert action.

The snooze action requires the `effectiveDate` parameter. The dismiss action requires no parameters.

Signature

```
public List<String> parameters {get; set;}
```

Property Value

Type: List<String>

RecordAlertInfo Class

Represents details about the record alert.

Namespace

[fscwmgen](#)

[RecordAlertInfo Properties](#)

RecordAlertInfo Properties

The following are properties for `RecordAlertInfo`.

[actionInfoList](#)

Details of an action taken on a record alert.

[categoryFullName](#)

The category name of the record alert.

[description](#)

The description of the record alert.

[effectiveDate](#)

The start date and time from when an active record alert is in effect.

[isActive](#)

Indicates whether a record alert is active or not.

[parentId](#)

The parent ID of the record alert.

[severity](#)

Indicates the degree of impact of the record alert.

[sourceSystemId](#)

The ID of the source system that this record alert was sourced from.

[subject](#)

The subject line of the record alert.

[validUntilDate](#)

The date and time from when a record alert is no longer valid.

[whatId](#)

The Salesforce object record ID on which a record alert is created.

actionInfoList

Details of an action taken on a record alert.

Signature

```
public List<fscwmgen.RecordAlertActionInfo> actionInfoList {get; set;}
```

Property Value

Type: List<[fscwmgen.RecordAlertActionInfo](#)>

categoryFullName

The category name of the record alert.

Signature

```
public String categoryFullName {get; set;}
```

Property Value

Type: String

description

The description of the record alert.

Signature

```
public String description {get; set;}
```

Property Value

Type: String

effectiveDate

The start date and time from when an active record alert is in effect.

Signature

```
public Datetime effectiveDate {get; set;}
```

Property Value

Type: Datetime

isActive

Indicates whether a record alert is active or not.

Signature

```
public Boolean isActive {get; set;}
```

Property Value

Type: Boolean

parentId

The parent ID of the record alert.

Signature

```
public String parentId {get; set;}
```

Property Value

Type: String

severity

Indicates the degree of impact of the record alert.

Signature

```
public String severity {get; set;}
```

Property Value

Type: String

sourceSystemId

The ID of the source system that this record alert was sourced from.

Signature

```
public String sourceSystemId {get; set;}
```

Property Value

Type: String

subject

The subject line of the record alert.

Signature

```
public String subject {get; set;}
```

Property Value

Type: String

validUntilDate

The date and time from when a record alert is no longer valid.

Signature

```
public Datetime validUntilDate {get; set;}
```

Property Value

Type: Datetime

whatId

The Salesforce object record ID on which a record alert is created.

Signature

```
public String whatId {get; set;}
```

Property Value

Type: String

RecordAlertProvider Interface

Implement this interface to provide record alerts and to perform actions on the record alerts.

Namespace

[fscwmgen](#)

[RecordAlertProvider Methods](#)

[RecordAlertProvider Example Implementation](#)

RecordAlertProvider Methods

The following are methods for `RecordAlertProvider`.

[dismissAlert\(var1\)](#)

Use this method to dismiss the record alert.

[getAlertsByParentId\(var1\)](#)

Retrieve record alerts by the parent ID.

[getAlertsByWhatId\(var1\)](#)

Retrieve record alerts by the Salesforce object record ID.

[getAlertsByWhatIdAndParentId\(var1, var2\)](#)

Retrieve record alerts by both the Salesforce record ID and the related parent ID.

[snoozeAlert\(var1, var2\)](#)

Use this method to snooze the record alert.

dismissAlert (var1)

Use this method to dismiss the record alert.

Signature

```
public fscwmgen.RecordAlertInfo dismissAlert(String var1)
```

Parameters

var1

Type: String

Specify the action value as `Dismiss`.

Return Value

Type: [fscwmgen.RecordAlertInfo](#)

getAlertsByParentId(var1)

Retrieve record alerts by the parent ID.



Note: This method aggregates alerts associated with `PersonAccount` and `FinancialAccount`. For example, `getRecordByParentId` on `PersonAccount` returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByParentId(String var1)
```

Parameters

var1

Type: String

Specify the parent ID.

Return Value

Type: [List<fscwmgen.RecordAlertInfo>](#)

getAlertsByWhatId(var1)

Retrieve record alerts by the Salesforce object record ID.



Note: This method aggregates alerts associated with `PersonAccount` and `FinancialAccount`. For example, `getRecordByWhatId` on `PersonAccount` returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByWhatId(String var1)
```

Parameters

var1

Type: String

Specify the Salesforce record ID.

Return Value

Type: List<[fscwmgen.RecordAlertInfo](#)>

getAlertsByWhatIdAndParentId(var1, var2)

Retrieve record alerts by both the Salesforce record ID and the related parent ID.

 **Note:** This method aggregates alerts associated with PersonAccount and FinancialAccount. For example, `getRecordByWhatId` on PersonAccount returns all alerts related to the person account, all alerts related to the person's financial accounts, and all alerts related to financial account transactions for each financial account.

It returns alerts in the following basic structure for `whatId` and `parentId`.

What Id	Parent Id	Subject	Description
Person AccountId	null	Text1	Text2
Financial AccountId	null	Text3	Text4
Financial TransactionId	Financial AccountId	Text5	Text6

Signature

```
public List<fscwmgen.RecordAlertInfo> getAlertsByWhatIdAndParentId(String var1, String var2)
```

Parameters

var1

Type: String

Specify the related parent ID.

var2

Type: String

Specify the Salesforce record ID.

Return Value

Type: List<[fscwmgen.RecordAlertInfo](#)>

snoozeAlert(var1, var2)

Use this method to snooze the record alert.

Signature

```
public fscwmgen.RecordAlertInfo snoozeAlert(String var1, Datetime var2)
```

Parameters

var1

Type: String

Specify the action value as Dismiss.

var2

Type: Datetime

Specify the snooze date for the record alert to reappear after the specified time period.

Return Value

Type: [fscwmgen.RecordAlertInfo](#)

RecordAlertProvider Example Implementation

This is an example implementation of the `fscwmgen.RecordAlertProvider` interface.

The following example tests the implementation:

```
global class CoreBankingAlertProvider implements fscwmgen.RecordAlertProvider {

    public List<fscwmgen.RecordAlertInfo> getAlertsByWhatId(String whatId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/get_by_whatId');
        req.setMethod('GET');
        Http http = new Http();
        HTTPResponse res = http.send(req);
        Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');

        List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
        // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

        for(CoreBankingResult res : results){
            fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
whatId, null);
            newAlerts.add(newAlert);
        }

        // Return the list of alerts
        return newAlerts;
    }

    public List<fscwmgen.RecordAlertInfo> getAlertsByParentId(String parentId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
```

```

    req.setEndpoint('callout:My_Named_Credential/get_by_parentId');
    req.setMethod('GET');
    Http http = new Http();
    HTTPResponse res = http.send(req);
    Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
    List<Object> results = (List<Object>) jsonResp.get('results');

    List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
    // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

    for(CoreBankingResult res : results){
        // Retrieve whatId for this specific alert. Can be queried from Salesforce or
        provided by CoreBanking.
        String whatId = retrieveWhatId();
        fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
whatId, parentId);
        newAlerts.add(newAlert);
    }

    // Return the list of alerts
    return newAlerts;
}

    public List<fscwmgen.RecordAlertInfo> getAlertsByWhatIdAndParentId(String whatId,
String parentId) {
        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/get_by_whatId_and_parentId');
        req.setMethod('GET');
        Http http = new Http();
        HTTPResponse res = http.send(req);
        Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
        List<Object> results = (List<Object>) jsonResp.get('results');

        List<fscwmgen.RecordAlertInfo> newAlerts = new List<fscwmgen.RecordAlertInfo>();
        // Assuming CoreBankingResult is an apex class holding the result from CoreBanking.

        for(CoreBankingResult res : results){
            fscwmgen.RecordAlertInfo newAlert = convertCoreBankingAlertToSalesforceAlert(res,
whatId, parentId);
            newAlerts.add(newAlert);
        }

        // Return the list of alerts
        return newAlerts;
    }

    public fscwmgen.RecordAlertInfo snoozeAlert(String alertId, Datetime snoozeUntilDate){

        HttpRequest req = new HttpRequest();
        // This callout is specific to the Core banking.
        req.setEndpoint('callout:My_Named_Credential/snoozeAlert');
    }

```

```

    req.setMethod('GET');
    Http http = new Http();
    HTTPResponse res = http.send(req);
    // Perform error handling on response. Below code is when the response is valid.
    Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
    List<Object> results = (List<Object>) jsonResp.get('results');
    // Retrieve whatId from corebanking result. Other mechanism is to lookup from
salesforce.
    String whatId = results.get(0).getId();
    return convertCoreBankingAlertToSalesforceAlert(results.get(0));
}

public fscwmgen.RecordAlertInfo dismissAlert(String alertId) {
    HttpRequest req = new HttpRequest();
    // This callout is specific to the Core banking.
    req.setEndpoint('callout:My_Named_Credential/snoozeAlert');
    req.setMethod('GET');
    Http http = new Http();
    HTTPResponse res = http.send(req);
    // Perform error handling on response. Below code is when the response is valid.
    Map<String, Object> jsonResp = (Map<String, Object>)
JSON.deserializeUntyped(response.getBody());
    List<Object> results = (List<Object>) jsonResp.get('results');
    / Retrieve whatId from corebanking result. Other mechanism is to lookup from
salesforce.
    String whatId = results.get(0).getId();
    return convertCoreBankingAlertToSalesforceAlert(results.get(0));
}

private RecordAlertInfo convertCoreBankingAlertToSalesforceAlert(CoreBankingResult
alert, String whatId, String parentId) {
    fscwmgen.RecordAlertInfo newAlert = new fscwmgen.RecordAlertInfo();
    newAlert.subject = alert.getSubject();
    newAlert.description = alert.getDescription();
    newAlert.sourceSystemId = alert.getId();
    newAlert.parentId = parentId;
    newAlert.whatId = whatId;
    // This could also use conversion from Core Banking category to salesforce
RecordAlertCategory
    newAlert.categoryFullName = 'Fraud';

    newAlert.actionInfoList = new List<fscwmgen.RecordAlertActionInfo>();
    // snooze Action
    fscwmgen.RecordAlertActionInfo snooze = new fscwmgen.RecordAlertActionInfo();
    snooze.actionName = 'snooze';
    snooze.parameters = new List<String>();
    // SnoozeUntilDate is required parameter
    snooze.parameters.add('snoozeUntilDate');
    newAlert.actionInfoList.add(snooze);

    // Dismiss Action
    fscwmgen.RecordAlertActionInfo dismiss = new fscwmgen.RecordAlertActionInfo();
    dismiss.actionName = 'dismiss';

```

```

        newAlert.actionInfoList.add(dismiss);
    }
    return newAlert;
}

```

RecordAlertsWrapper Class

Use the callable RecordAlertsWrapper class to fetch Record Alert data. For Financial Services Cloud, you can group the results by Financial Account and Record Alert Category.

Namespace

fscwmgen

Usage

The ServiceExcellenceAlertCard and ServiceExcellenceGenericAlertCard have Integration Procedure data sources that call the RecordAlertsWrapper class. These FlexCards display information about financial accounts.

[RecordAlertsWrapper Methods](#)

RecordAlertsWrapper Methods

The following are methods for RecordAlertsWrapper.

[call\(action, args\)](#)

This method calls one of the available RecordAlertsWrapper actions and passes arguments to that action.

call(action, args)

This method calls one of the available RecordAlertsWrapper actions and passes arguments to that action.

Signature

```
public Object call(String action, Map<String, Object> args)
```

Parameters

action

Type: String

The action to call. The value must be one of the following:

- *getAlertsByWhatId* — Returns all active Record Alerts with the specified Id, where SnoozeUntilDate < now < ValidUntilDate.
- *getAlertsByWhatIdBatch* — Returns all active record alerts with one of the specified Ids, where SnoozeUntilDate < now < ValidUntilDate.
- *snoozeAlert* — Snoozes the Record Alert with the specified Id until the snoozeUntilDate value.

- *dismissAlert* — Dismisses the record alert with the specified Id by setting the isActive field to false.

args

Type: Map<String, Object>

The arguments passed to the corresponding action:

- *getAlertsByWhatId*
 - String Id — The Id of the what Id field to fetch Record alerts.
 - boolean IsFSC — Set to true to group results by Financial Account and Record Alert Category.
 - int Limit — Maximum number of alerts to return. Allowed values are 1-20.
 - int childLimit — Maximum number of aggregated alerts to return. Allowed values are 1-10.
- *getAlertsByWhatIdBatch*
 - List<String> Ids — The Ids of the what Id field to fetch Record alerts.
 - boolean IsFSC — Set to true to group results by Financial Account and Record Alert Category.
 - int Limit — Maximum number of alerts to return. Allowed values are 1-20.
 - int childLimit — Maximum number of aggregated alerts to return. Allowed values are 1-10.
- *snoozeAlert*
 - String Id — The id of the Record Alert to snooze.
 - Date snoozeUntilDate — The date at which the Record Alert is no longer snoozed.
- *dismissAlert*
 - String Id — The id of the record alert to dismiss.

Return Value

The data returned by getAlertsByWhatId and getAlertsByWhatIdBatch looks like this:

```
{
  "numAlerts": 2,
  "groupedAlerts": [
    {
      "Subject": "Sample Alert",
      "Description": "Sample Description",
      "WhatId": "0x0000002c4d4eM",
      "StartDate": "2022-11-30T15:05:47",
      "ValidUntilDate": "2023-11-30T15:05:47",
      "SnoozeUntilDate": "2022-12-05T15:05:47"
    }
  ],
  "alerts": [
    {
      "Subject": "Sample Alert",
      "Description": "Sample Description",
      "WhatId": "0x0000002c4d4eM",
      "StartDate": "2022-11-30T15:05:47",
```

```
        "ValidUntilDate": "2023-11-30T15:05:47",  
        "SnoozeUntilDate": "2022-12-05T15:05:47"  
    }  
]  
}
```

Usage

To use this class in an Integration Procedure, specify the class in the Remote Class property, the action in the Remote Method property, and the arguments in the Additional Input property.

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](#).

[Resources](#)

Here's a list of Financial Services Cloud 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.

Resources

Here's a list of Financial Services Cloud 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.

[Record Alerts \(Financial Accounts\)](#)

Retrieve a list of active record alerts on financial accounts.

[Record Alerts \(Person Accounts\)](#)

Retrieve a list of active record alerts on person accounts.

[Bulk Record Alerts \(Financial Accounts\)](#)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with financial accounts.

[Bulk Record Alerts \(Person Accounts\)](#)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with person accounts.

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 691

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
<i>loanId</i>	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",
    "createdAt" : "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",
      "createdAt" : "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-bb73-6f6dlce7e9a9",
    "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

Name	Type	Description	Required or Optional	Available Version
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
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
isBorrowerCommunityPropertyState	Boolean	Indicates whether borrower lives in community property state.	Optional	48.0
isConstructionLoan	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	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
		interest payments are added to the outstanding loan balance.		
~~isInCommunityPropState~~ isInCommunityPropState	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 closing. Once construction is complete, loan converts to a traditional mortgage.	Optional	48.0
~~isSubjectToPriorityLien~~ 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
~~isTempRateBuydown~~ isTempRateBuydown	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~~ 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~~ monthsBeforeFirstAdj	Integer	Initial period prior to first adjustment in months.	Optional	48.0
~~monthsBetweenAdjustments~~ 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

Name	Type	Description	Required or Optional	Available Version
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 <code>accountId</code> 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
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
otherRefinanceProgramType	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" : "0ckRM000000000OhYAI"
      } ],
      "externalId" : "0fc5e4d6-de5d-4954-9d21-3c628ad8809a",
      "id" : "0cURM000000000K32AI",
      "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" : "0ckRM000000000OiYAI"
      } ],
      "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" : "0chRM00000000HjJYAU"
  } ],
  {
    "externalId" : "194bcc9c-7b86-4a49-9d17-fad0e4d205a3",
    "id" : "0chRM00000000HjKYAU"
  } ],
  "properties" : [ {
    "externalId" : "a57f5b81-477b-41a3-a647-5852562913e5",
    "id" : "0cPRM000000007c2AA"
  } ],
  "titleHolders" : [ {
    "externalId" : "e8d51e2a-7d97-4da0-8356-ca86995d3d39",
    "id" : "0cTRM00000000Bf2AI"
  } ]
} ]
}

```

Record Alerts (Financial Accounts)

Retrieve a list of active record alerts on financial accounts.

The following is a list of alerts retrieved for a financial account:

- Alerts for the specified financial account.
- Alerts on financial transactions that are related to the financial account.

Resource

```
/financialservices/recordalerts/financialaccount/${financialAccountId}
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/financialservices/recordalerts/financialaccount/a0URO000000Ccbz2AC
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Response body for GET[Record Alert Collection](#)**JSON example of response body**

```
{
  "recordAlerts" : [ {
    "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
        "parameters" : [ "effectiveDate" ]
      } ]
    },
    "description" : "Alert description from external source system",
    "severity" : "Test",
    "source" : "External",
    "sourceSystemId" : "sourceSystemId",
    "subject" : "Test external subject",
    "whatId" : "a0URO000000Ccbz2AC"
  }, {
    "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
        "parameters" : [ "effectiveDate" ]
      } ]
    },
    "active" : true,
    "description" : "abc",
    "effectiveDate" : "2021-11-11T20:40:06.000Z",
    "id" : "0qZRO000000000Q",
    "parentId" : "a0URO000000Ccbz",
    "recordAlertCategoryName" : "Fraud",
    "severity" : "Error",
    "source" : "Internal",
    "subject" : "Alert on FAT1",
    "validUntilDate" : "2022-03-10T20:00:00.000Z",
    "whatId" : "a0TRO000000DrWJ"
  }, {
    "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
        "parameters" : [ "effectiveDate" ]
      } ]
    },
    "active" : true,
    "description" : "Unauthorized transaction on card ending with -XXXX on Nov. 11,
```

```

2021 in Norfolk, VA",
  "effectiveDate" : "2021-11-03T19:00:00.000Z",
  "id" : "0qZRO000000003e",
  "recordAlertCategoryName" : "Fraud",
  "severity" : "Error",
  "source" : "Internal",
  "subject" : "Fraudulent Transaction",
  "validUntilDate" : "2022-11-10T20:00:00.000Z",
  "whatId" : "a0URO000000Ccbz"
}, {
  "actions" : {
    "actionInfoCollection" : [ {
      "actionName" : "dismiss",
      "parameters" : [ ]
    }, {
      "actionName" : "snooze",
      "parameters" : [ "effectiveDate" ]
    } ]
  },
  "active" : true,
  "description" : "Transaction has an issue",
  "effectiveDate" : "2021-11-10T21:02:48.000Z",
  "id" : "0qZRO000000000u",
  "parentId" : "a0URO000000Ccbz",
  "recordAlertCategoryName" : "Fraud",
  "severity" : "Error",
  "source" : "Internal",
  "subject" : "Transaction has an issue",
  "validUntilDate" : "2021-12-17T20:00:00.000Z",
  "whatId" : "a0TRO000000DrWO"
} ]
}

```

Record Alerts (Person Accounts)

Retrieve a list of active record alerts on person accounts.

The following is a list of alerts retrieved for a person account:

- Alerts for the specified person account.
- Alerts for the financial accounts owned by the person.
- Alerts on financial transactions that are related to the financial accounts.

Resource

```
/financialservices/recordalerts/person/${personId}
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/financialservices/recordalerts/person/001RO000002Kn4BYAS
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Response body for GET[Record Alert Collection](#)**JSON example of response body**

```
{
  "recordAlerts" : [ {
    "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
        "parameters" : [ "effectiveDate" ]
      } ]
    },
    "description" : "Alert description from an external source system",
    "severity" : "Test",
    "source" : "External",
    "sourceSystemId" : "sourceSystemId",
    "subject" : "foo apex subject",
    "whatId" : "001RO000002Kn4BYAS"
  }, {
    "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
        "parameters" : [ "effectiveDate" ]
      } ]
    },
    "active" : true,
    "description" : "Unauthorized transaction on card",
    "effectiveDate" : "2021-11-10T20:00:00.000Z",
    "id" : "0qZRO000000003Z",
    "recordAlertCategoryName" : "Fraud",
    "severity" : "Error",
    "source" : "Internal",
    "subject" : "Fraud Transaction 3",
    "validUntilDate" : "2022-11-10T20:00:00.000Z",
    "whatId" : "001RO000002Kn4B"
  }, {
    "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
        "parameters" : [ "effectiveDate" ]
      } ]
    }
  }
]
```

```

    } ]
  },
  "active" : true,
  "description" : "Your card was used in a fraudulent transaction on 11/4/2021",
  "effectiveDate" : "2021-11-10T20:00:00.000Z",
  "id" : "0qZRO000000003K",
  "recordAlertCategoryName" : "Fraud",
  "severity" : "Error",
  "source" : "Internal",
  "subject" : "Fraud Transaction Alert",
  "validUntilDate" : "2022-11-04T19:00:00.000Z",
  "whatId" : "001RO000002Kn4B"
} ]
}

```

Bulk Record Alerts (Financial Accounts)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with financial accounts.

You can retrieve these alerts for a financial account:

- Alerts for the specified financial account.
- Alerts on financial transactions that are related to the financial account.

Resource

```
/recordalerts/batch
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?
financialAccountIds=0x3R0000026YJ8uIAG,0x3R0000026YJ8uIAG,0x3Dx00000004X2F
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
<code>financialAccountIds</code>	<code>String[]</code>	The IDs of the financial account records on which record alerts are created.	Required	55.0

Response body for GET

[Record Alert Collection Map](#)

Bulk Record Alerts (Person Accounts)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with person accounts.

You can retrieve these alerts for a person account:

- Alerts for the specified person account.
- Alerts for the financial accounts owned by the person.
- Alerts on financial transactions that are related to the financial accounts.

Resource

```
/recordalerts/batch
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?personIds=001R00000026YJ8uIAG,001R00000026YJ8uIAG,001x000000004
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
personIds	String[]	The IDs of the person records on which record alerts are created.	Required	55.0

Response body for GET

[Record Alert Collection Map](#)

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

Name	Type	Description	Required or Optional	Available Version
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

Name	Type	Description	Required or Optional	Available Version
monthlyRentPayment	Double	Borrower's monthly rent payment (if applicable).	Optional	48.0
name	String	Name of the borrower's address.	Optional	48.0
residenceAdditionalMonths	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
hasCoSignedDebt	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
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
hasUndisclosedCreditApp	Boolean	Indicates whether, on or before closing, borrower applied for new undisclosed credit like a credit card or installment loan.	Optional	48.0
hasUndisclosedOtherAplica	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

Name	Type	Description	Required or Optional	Available Version
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
~~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
~~currentJobMonthCount~~	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

Name	Type	Description	Required or Optional	Available Version
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
monthlyMilitaryEntitlementAmount	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
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

Name	Type	Description	Required or Optional	Available Version
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
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
militaryExpirationMonth	Integer	Month that borrower's tour of service expires.	Optional	48.0
militaryExpirationYear	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
otherPacificIslandSubType	String	Borrower's native Hawaiian or Pacific Islander race if other is specified.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
~~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

Name	Type	Description	Required or Optional	Available Version
~~grossMonthlyRentIncome~~	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
~~netMonthlyRentIncome~~	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": "Finl",
    "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
~~counselingCompleteBorName~~	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
~~estHomeownersInsurancePayment~~	Double	Proposed monthly payment for homeowners insurance on application property.	Optional	48.0

Name	Type	Description	Required or Optional	Available Version
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
estStudentLoanPayment	Double	Proposed total monthly payment for other mortgages or liens on loan application property, including principal and interest.	Optional	48.0
estSuppInsurancePayment	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
financedMortgageInsuranceAmt	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
homeCompleteBorrowerName	String	Name of borrower or borrowers who completed homeownership education.	Optional	48.0
homeownerCompleteDate	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

Name	Type	Description	Required or Optional	Available Version
~~hudApprovedAgencyId~~	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
~~loanExclMortgageInsure~~	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
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
outstandingLoanAmt	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
~~renovAndRepairsAmt~~	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",
"pacifislanderSubType": "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-844fela007c6",
    "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

Name	Type	Description	Required or Optional	Available Version
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
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
isBorrowerCommunityPropertyState	Boolean	Indicates whether borrower lives in community property state.	Optional	48.0
isConstructionLoan	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

Name	Type	Description	Required or Optional	Available Version
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
isInCommunityPropertyState	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 closing. Once construction is complete, loan converts to a traditional mortgage.	Optional	48.0
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
isTempInterestBuydown	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
monthsBeforeAdjustments	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

Name	Type	Description	Required or Optional	Available Version
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
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
otherRefinanceProgramType	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
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

Name	Type	Description	Required or Optional	Available Version
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
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

Name	Type	Description	Required or Optional	Available Version
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.

[Record Alert Collection Map](#)

Output representation of the bulk record alerts request.

[Record Alert Collection](#)

Output representation of a collection of record alerts.

[Record Alert](#)

Output representation of the details of a record alert.

[Record Alert Action Info Collection](#)

Output representation of the details of an action on the record alert.

[Record Alert Action Info](#)

Output representation of the information of the record alert action.

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 source if 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
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
currentJobId	Integer	Additional number of months employed at this job (less than 12).	Small, 48.0	48.0
currentJobCount	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

Property Name	Type	Description	Filter Group and Version	Available Version
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
isShareholder	Boolean	Indicates whether borrower owns less than 25% of this business (if applicable).	Small, 48.0	48.0
isSelfEmployed	Boolean	Indicates whether borrower is employed by a family member, property seller, real estate agent, or other person party to the loan application transaction.	Small, 48.0	48.0
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
monthlyBonusAmount	Double	Borrower's monthly bonus from this job.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version	
~~monthlyBonusAmt~~	Double	Borrower's monthly bonus from this job.	Small, 48.0	48.0	
~~monthlyCommissionAmt~~	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	
~~monthlyMilitaryEnt~~	Double	Borrower's monthly military entitlement from this job.	Small, 48.0	48.0	
~~monthlyOtherIncomeAmt~~	Double	Borrower's other monthly income from this job.	Small, 48.0	48.0	
~~monthlyOvertimeAmt~~	Double	Borrower's monthly overtime income from this job.	Small, 48.0	48.0	
~~monthlyTotalIncomeAmt~~	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	
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

Property Name	Type	Description	Filter Group and Version	Available Version
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
residenceAdditionalMonthCount	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
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 690	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

Property Name	Type	Description	Filter Group and Version	Available Version
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 borrower or the borrower's deceased spouse served in the past.	Small, 48.0	48.0
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

Property Name	Type	Description	Filter Group and Version	Available Version
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
otherPacificIslanderSubType	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
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

Property Name	Type	Description	Filter Group and Version	Available Version
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
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

Property Name	Type	Description	Filter Group and Version	Available Version
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
~~hasCoSignerDisclosedDebt~~	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
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
~~hasUndisclosedAutoDebtApp~~	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
~~hasUndisclosedOtherDebtApp~~	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

Property Name	Type	Description	Filter Group and Version	Available Version
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 Property Assessed Clean Energy Program financing that takes priority over the first mortgage lien.	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 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

Property Name	Type	Description	Filter Group and Version	Available Version
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
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
isNonCommunityPropState	Boolean	Indicates whether the borrower lives in community property state.	Small, 48.0	48.0
isConstructionPermit	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
isPropCommunityPropState	Boolean	Indicates whether property is located in a community property state.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
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
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

Property Name	Type	Description	Filter Group and Version	Available Version
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
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
otherRefinanceProgramType	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

Property Name	Type	Description	Filter Group and Version	Available Version
titleType	String	Number of months during which borrower incurs a penalty for early payoff of the loan balance.	Small, 48.0	48.0
totalLiabilityMonthlyAmt	Double	Total monthly amount of borrowers' outstanding financial liabilities payments excluding real estate.	Small, 48.0	48.0
totalFinancialAssetAmt	Double	Total amount of borrowers' financial account assets excluding real estate.	Small, 48.0	48.0
totalOtherAssetAmt	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
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 borrower.	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

Property Name	Type	Description	Filter Group and Version	Available Version
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
estimatedGrossMonthlyRentalIncome	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
estimatedNetMonthlyRentalIncome	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

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
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
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

Property Name	Type	Description	Filter Group and Version	Available Version
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
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

Property Name	Type	Description	Filter Group and Version	Available Version
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
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
cashOnMarketValue	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
grossMonthlyRentIncome	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

Property Name	Type	Description	Filter Group and Version	Available Version
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
netMonthlyPentalIncome	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
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

Property Name	Type	Description	Filter Group and Version	Available Version
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
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
counselingAgencyName	String	Education provider's name if agency isn't HUD-approved or if Housing Counseling Agency ID is unknown.	Small, 48.0	48.0

Property Name	Type	Description	Filter Group and Version	Available Version
~~counselingCompleteByName~~	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
~~estHomeInsurancePayment~~	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
~~estSupplementalInsurancePayment~~	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

Property Name	Type	Description	Filter Group and Version	Available Version
financedMortgageInsuranceAmt	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
homeownerCompletedName	String	Name of borrower or borrowers who completed homeownership education.	Small, 48.0	48.0
homeownerCompletedDate	String	Date borrower completed homeownership education.	Small, 48.0	48.0
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
hudApprovedAgencyId	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

Property Name	Type	Description	Filter Group and Version	Available Version
~~loanEstMortgageInsure~~	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
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
~~totalMortgageLoanDebtAmt~~	Double	Total mortgage loans plus total credits.	Small, 48.0	48.0
totalMortgageLoanAmt	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

Property Name	Type	Description	Filter Group and Version	Available Version
result	Mortgage Information Output	Data of the mortgage result.	Small, 48.0	48.0

Record Alert Collection Map

Output representation of the bulk record alerts request.

JSON example

```
{
  "hasErrors": true,
  "results": {
    "001RO000003KPW0YAO": {
      "recordAlertErrors": [
        {}
      ],
      "recordAlerts": [
        {
          "actions": {
            "actionInfoCollection": [
              {
                "actionName": "snooze",
                "parameters": [
                  "snoozeUntilDate"
                ]
              },
              {
                "actionName": "dismiss",
                "parameters": []
              }
            ]
          },
          "active": true,
          "description": "Alert Description",
          "effectiveDate": "2022-03-10T20:00:00.000Z",
          "id": "0qZRO000000008o",
          "severity": "Error",
          "snoozeUntilDate": "2022-03-12T19:09:06.000Z",
          "source": "Internal",
          "subject": "Alert Subject",
          "validUntilDate": "2022-03-30T19:00:00.000Z",
          "whatId": "001RO000003KPW0"
        }
      ],
      "status": "SUCCESS"
    },
    "001RO000003NJJrYAO": {
      "recordAlertErrors": [
        {
          "errorCode": "Apex_Execution_Error",
          "errorMessage": "Insufficient access to record"
        }
      ]
    }
  }
}
```

```

    }
  ],
  "recordAlerts": [
    {
      "actions": {
        "actionInfoCollection": [
          {
            "actionName": "snooze",
            "parameters": [
              "snoozeUntilDate"
            ]
          },
          {
            "actionName": "dismiss",
            "parameters": []
          }
        ]
      },
      "active": true,
      "description": "Alert Description",
      "effectiveDate": "2022-03-08T20:00:00.000Z",
      "id": "0qZRO0000000BO",
      "severity": "Info",
      "snoozeUntilDate": "2022-03-21T15:26:45.000Z",
      "source": "Internal",
      "subject": "Alert Subject",
      "validUntilDate": "2022-03-31T19:00:00.000Z",
      "whatId": "001RO000003NJJr"
    }
  ]
},
"status": "PARTIAL_SUCCESS"
}
}

```

Property Name	Type	Description	Filter Group and Version	Available Version
hasErrors	Boolean	Indicates whether at least one of the results in the result set contains an error (<code>true</code>) or not (<code>false</code>).	Small, 55.0	55.0
results	Map<String, Record Alert Collection >	Represents the collection of record alerts.	Small, 55.0	55.0

Record Alert Collection

Output representation of a collection of record alerts.

Property Name	Type	Description	Filter Group and Version	Available Version
recordAlerts	Record Alert []	Represents the details of a record alert.	Small, 54.0	54.0

Record Alert

Output representation of the details of a record alert.

Property Name	Type	Description	Filter Group and Version	Available Version
actions	Record Alert Action Info Collection	Represents the details of an action taken on a record alert.	Small, 54.0	54.0
active	Boolean	Indicates whether a record alert is active (<code>true</code>) or not (<code>false</code>).	Small, 54.0	54.0
description	String	The description of a record alert.	Small, 54.0	54.0
effectiveDate	String	The start date and time from when an active record alert is in effect.	Small, 54.0	54.0
id	String	The record alert ID.	Small, 54.0	54.0
parentId	String	The parent ID of a record alert.	Small, 54.0	54.0
recordAlertCategoryName	String	The category name of a record alert.	Small, 54.0	54.0
severity	String	Indicates the degree of impact of a record alert. Possible values are: • Error • Info • Warning	Small, 54.0	54.0
source	String	Identifies the source system that generated the record alert. Possible values are: • External • Internal	Small, 54.0	54.0
sourceSystemId	String	The ID of the source system that this record alert was sourced from.	Small, 54.0	54.0
subject	String	The subject line of a record alert.	Small, 54.0	54.0
validUntilDate	String	The date and time from when a record alert is no longer valid.	Small, 54.0	54.0
whatId	String	The Salesforce object record ID on which a record alert is created.	Small, 54.0	54.0

Record Alert Action Info Collection

Output representation of the details of an action on the record alert.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>actionInfoCollection</code>	Record Alert Action Info []	Represents the action details of a record alert.	Small, 54.0	54.0

Record Alert Action Info

Output representation of the information of the record alert action.

Property Name	Type	Description	Filter Group and Version	Available Version
<code>actionName</code>	String	The name of the action performed on a record alert. Possible values are: • <code>Dismiss</code> • <code>Snooze</code>	Small, 54.0	54.0
<code>parameters</code>	String[]	List of parameters specified for the record alert action.	Small, 54.0	54.0

FINANCIAL SERVICES CLOUD METADATA API

AccountRelationshipShareRule

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.

AccountRelationshipShareRule

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

SEE ALSO:

[Metadata API Developer Guide: AccountRelationshipShareRule](#)

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
<code>processType</code>	<code>FlowProcessType</code> (enumeration of type string)	The type of the flow, as determined by the active version. Valid values added by Financial Services Cloud include: <code>FSClending</code>—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
<code>actionType</code>	<code>FlowActionType</code> (enumeration of type string)	Required. The action type. Additional valid values only for Financial Services Cloud include: <code>createFinancialRecords</code>—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 <code>image</code> field.
key	string	Required. A field value in the object. For example, with the <code>PersonLifeEvent</code> object, possible values for <code>key</code> can be <code>birthday</code> , <code>marriage</code> , <code>childbirth</code> , and so on.
usageType	IconUsageType (enumeration of type string)	Required. The object that is mapped to the image. Valid values are: • <code>PersonLifeEvent</code> • <code>InsurancePolicy</code> • <code>BusinessMilestone</code>

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 Financial Services 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 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

Users need the Health Cloud permissions to access the settings available in editions with Health Cloud.

Fields for Financial Services Cloud

Field Name	Field Type	Description
<code>allowMultipleProducersToWorkOnSamePolicy</code>	boolean	Indicates whether multiple producers can be assigned to the same insurance policy. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>createCustomerPropertyFromLAProperty</code>	boolean	When importing loan application data, indicates whether to create a customer property record from a loan application property record to represent the new home.
<code>createFinancialAccountFromLAAsset</code>	boolean	When importing loan application data, indicates whether to create financial account records from the assets listed in the loan application.
<code>createFinancialAccountFromLALiability</code>	boolean	When importing loan application data, indicates whether to create financial account records from the liabilities listed in the loan application.
<code>createFinancialAccountsFromLAFinancials</code>	boolean	When importing loan application data, indicates whether to create a financial account record that represents the mortgage loan.
<code>createFinancialAccountsFromLAProperty</code>	boolean	When importing loan application data, indicates whether to create a financial account record from the loan application property to represent the new home.
<code>createFSCAssetFromLAAsset</code>	boolean	When importing loan application data, indicates whether to create asset records from the assets listed in the loan application.
<code>createFSCAssetFromLAProperty</code>	boolean	When importing loan application data, indicates whether to create an asset record from a loan application property record to represent the new home that was acquired.
<code>createFSCLiabilityFromLAFinancial</code>	boolean	When importing loan application data, indicates whether to create a liability record from a loan application property record to represent the new mortgage loan.
<code>createFSCLiabilityFromLALiability</code>	boolean	When importing loan application data, indicates whether to create liability records from the liabilities listed in the loan application.

Field Name	Field Type	Description
<code>enableAccessToMasterListOfCoverageTypes</code>	boolean	Indicates whether insurance agents can access the main list of coverage types. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableBlockResourceAvailabilityOrgPref</code>	boolean	Indicates whether Lightning Scheduler service appointments are added to users' Salesforce calendars. For example, if set to <code>false</code> , users don't see their service appointments on their calendars. The default is <code>false</code> .
<code>enableCompliantDataSharingForAccount</code>	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Account object. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableCreateMultiAttendeeEventOrgPref</code>	boolean	Indicates whether users can group individual events and view the list of all attendees under a single event <code>true</code> or not <code>false</code> . The default is <code>false</code> .
<code>enableDealManagement</code>	boolean	Indicates whether the Financial Deal Management feature is enabled. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableEinsteinDocReaderMappings</code>	boolean	Indicates whether the Intelligent Form Reader Mappings feature is enabled. The default is <code>false</code> .
<code>enableEinsteinDocReaderEnabled</code>	boolean	Indicates whether the Intelligent Form Reader feature is enabled. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableEventManagerOrgPref</code>	boolean	Indicates whether users can add multiple service resources to a service appointment. The default is <code>false</code> .
<code>enableFSCInsuranceReport</code>	boolean	Indicates whether sales managers can access the dashboard and prebuilt reports. The default is <code>false</code> . 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 <code>allowMultipleProducersToWorkOnSamePolicy</code> setting is already set to <code>true</code> .
<code>enableInteractionSummaryPref</code>	boolean	Indicates whether the Interaction Summary setting is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableInteractionSummaryRoleHierarchy</code>	boolean	Indicates whether the Role-Hierarchy-Based Sharing for Interaction Summaries is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableManyToManyRelationships</code>	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 <code>true</code> , agents can handle multiple

Field Name	Field Type	Description
		claims through one case or have multiple cases handling one claim. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableMortgageRlaTotalsOrgPref</code>	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 <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableMultiResourceOrgPref</code>	boolean	Indicates whether users can add multiple service resources to a service appointment. The default is <code>false</code> .
<code>enableOverbookingOrgPref</code>	boolean	Indicates whether users can add multiple service appointments to a single time slot for a service resource. If set to <code>false</code> , concurrent time slots are visible, but can't be modified. The default is <code>false</code> .
<code>enableShareSaWithArOrgPref</code>	boolean	Indicates whether users can share appointments with service resources <code>true</code> or not <code>false</code> . The default is <code>false</code> .
<code>enableRBLUsingCalcService</code>	boolean	Indicates whether Roll-by-Lookup (RBL) Using Calc Service is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableRecordRollup</code>	boolean	Indicates whether Record Rollup Optimization is enabled for your org. The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>enableReferralScoring</code>	boolean	Indicates whether Einstein Referral Scoring for Financial Services Cloud is enabled for your org (true) or not (false). The default is <code>false</code> . This field is available in editions where Financial Services Cloud is enabled.
<code>loanApplicantAddressAutoCreation</code>	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 <code>false</code> . This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
<code>loanApplicantAutoCreation</code>	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 <code>false</code> . This field is available in editions where Financial Services Cloud is enabled. Available in API version 51.0 and later.
<code>transformRBLtoDPE</code>	boolean	Indicates whether you can convert RBL rules into Data Processing Engine definitions for faster calculations. The default is <code>false</code> .

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">
  <allowMultipleProducersToWorkOnSamePolicy>true</allowMultipleProducersToWorkOnSamePolicy>

  <enableAccessToMasterListOfCoverageTypes>false</enableAccessToMasterListOfCoverageTypes>

  <enableBlockResourceAvailabilityOrgPref>true</enableBlockResourceAvailabilityOrgPref>

  <enableCompliantDataSharingForAccount>true</enableCompliantDataSharingForAccount>
  <enableEinsteinDocReader>true</enableEinsteinDocReader>
  <enableEventManagerOrgPref>true</enableEventManagerOrgPref>
  <enableFSCInsuranceReport>false</enableFSCInsuranceReport>
  <enableInteractionSummaryPref>true</enableInteractionSummaryPref>
  <enableInteractionSummaryRoleHierarchy>true</enableInteractionSummaryRoleHierarchy>
  <enableManyToManyRelationships>true</enableManyToManyRelationships>
  <enableMortgageRlaTotalsOrgPref>true</enableMortgageRlaTotalsOrgPref>
  <enableMultiResourceOrgPref>true</enableMultiResourceOrgPref>
  <enableOverbookingOrgPref>true</enableOverbookingOrgPref>
  <enableRBLUsingCalcService>true</enableRBLUsingCalcService>
  <enableRecordRollup>true</enableRecordRollup>
  <enableReferralScoring>true</enableReferralScoring>
  <loanApplicantAddressAutoCreation>true</loanApplicantAddressAutoCreation>
  <loanApplicantAutoCreation>true</loanApplicantAutoCreation>
</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>
```

DocumentChecklistSettings

Represents an org's DocumentChecklistItem settings. 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

DocumentChecklistSettings components are stored in the `DocumentChecklist.settings` file in the `settings` folder. The `.settings` files are different from other named components because there's only one settings file for each settings component.

Version

DocumentChecklistSettings components are available in API versions 55.0 and later.

Fields

Field Name	Field Type	Description
dcicustomSharing	boolean	Indicates whether the custom sharing rule for document checklist items is enabled for your org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
deleteDCIWithFiles	boolean	Indicates whether deletion of document checklist items is enabled for your org (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .

Declarative Metadata Sample Definition

The following is an example of a DocumentChecklistSettings.settings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DocumentChecklistSettings
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <dcicustomSharing>true</dcicustomSharing>
  <deleteDCIWithFiles>true</deleteDCIWithFiles>
</DocumentChecklistSettings>
```

Example Package Manifest

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>DocumentChecklist</members>
    <name>Settings</name>
  </types>
  <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

The wildcard character `*` (asterisk) in the `package.xml` manifest file doesn't apply to metadata types for feature settings. The wildcard applies only when retrieving all settings, not for an individual setting. For details, see [Settings](#). For information about using the manifest file, see [Deploying and Retrieving Metadata with the Zip File](#).

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.

 **[other]:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

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
<code>defaultAccessLevel</code>	Field Type picklist Description Required. The default sharing access granted to the participant role. Valid values are: • <code>Edit—Read/Write</code> • <code>None</code> • <code>Read—Read Only</code>
<code>isActive</code>	Field Type boolean Description Indicates whether the participant role is activated.
<code>masterLabel</code>	Field Type string Description Required. The name for the participant role.

Field Name	Description
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](#).

RelationshipGraphDefinition

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works.



Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Parent Type

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

File Suffix and Directory Location

RelationshipGraphDefinition components have the suffix `.relationshipGraphDefinition` and are stored in the `relationshipGraphDefinitions` folder.

Version

RelationshipGraphDefinition components are available in API version 55.0 and later.

Special Access Rules

The Financial Services Cloud permission set license is required to access this object.

Fields

Field Name	Description
<code>isActive</code>	Field Type boolean Description Required. Indicates whether the relationship graph is available for use (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.  Note: This field is read-only in API version 55.0.
<code>isTemplate</code>	Field Type boolean Description Required. Indicates whether you can configure this relationship graph as a template (<code>true</code> or not <code>false</code>). The default value is <code>false</code>. In the UI, this field is <i>Set as Template</i>.
<code>masterLabel</code>	Field Type string Description Required. A user-friendly name for RelationshipGraphDefinition, which is defined when the RelationshipGraphDefinition is created. In the UI, this field is <i>Label</i>.

Field Name	Description
relationshipGraphDefVersions	Field Type RelationshipGraphDefVersion[] Description Represents a list of graph versions associated with the relationship graph definition.

RelationshipGraphDefVersion

The list of graph versions associated with the relationship graph definition.

Field Name	Description
graphDefinition	Field Type string Description Required. Specifies a set of properties required to create a relationship graph, such as parent node, child relationships, filter and sort fields, and graph UI elements.
graphType	Field Type string Description Required. Specifies the type of graph. In API version 55.0, only <code>HorizontalHierarchy</code> graph type is supported.

Declarative Metadata Sample Definition

The following is an example of a RelationshipGraphDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RelationshipGraphDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
  <isActive>false</isActive>
  <isTemplate>true</isTemplate>
  <masterLabel>Account Graph</masterLabel>
  <relationshipGraphDefVersions>
    <graphDefinition>{
"graph" : {
  "rootNode" : {
    "object" : {
      "entity" : "Account"
    },
    "configurationType" : "Primary",
    "sortFields" : [ {
```

```

    "field" : {
      "field" : "LastModifiedDate",
      "whichEntity" : "TARGET"
    },
    "order" : "DESC"
  } ],
  "nodeUiConfig" : {
    "fieldsToDisplay" : [ ],
    "showFieldLabels" : true,
    "actions" : { }
  },
  "childRelationships" : [ {
    "OneToMany" : {
      "targetObjectNode" : {
        "object" : {
          "entity" : "Contact"
        },
        "configurationType" : "Custom",
        "sortFields" : [ {
          "field" : {
            "field" : "LastModifiedDate",
            "whichEntity" : "TARGET"
          },
          "order" : "DESC"
        } ],
        "nodeUiConfig" : {
          "fieldsToDisplay" : [ {
            "field" : "Name",
            "whichEntity" : "TARGET"
          }, {
            "field" : "Phone",
            "whichEntity" : "TARGET"
          } ],
          "showFieldLabels" : true,
          "actions" : {
            "containerActions" : [ {
              "action" : "New"
            } ],
            "recordActions" : [ {
              "action" : "Edit"
            } ],
            {
              "action" : "Delete"
            }
          ]
        }
      },
      "childRelationships" : [ ]
    },
    "relationshipUiConfig" : { },
    "filter" : {
      "filterCriteria" : [ {
        "field" : {
          "field" : "Name",
          "whichEntity" : "TARGET"
        },
      },

```

```

        "operator" : "eq",
        "value" : "Salesforce"
    } ],
    "booleanFilter" : "1"
},
"targetObjectField" : {
    "field" : "AccountId",
    "whichEntity" : "TARGET"
}
}
} ]
},
"globalUiConfig" : {
    "borderColor" : "Green2",
    "borderThickness" : "2px",
    "colorShading" : "Black",
    "fieldLayout" : "Vertically Stacked",
    "recordContainerExpansion" : true,
    "recordExpansion" : true
}
}
}</graphDefinition>
    <graphType>HorizontalHierarchy</graphType>
</relationshipGraphDefVersions>
</RelationshipGraphDefinition>

```

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">
    <fullName>Package1</fullName>
    <types>
        <members>*</members>
        <name>RelationshipGraphDefinition</name>
    </types>
    <version>55.0</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](#).

AssessmentQuestion

Represents the container object that stores the questions required for an assessment.

Parent Type

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

File Suffix and Directory Location

AssessmentQuestion components have the suffix `.AssessmentQuestion` and are stored in the `AssessmentQuestions` folder.

Version

AssessmentQuestion components are available in API version 55.0 and later.

Fields

Field Name	Description
<code>assessmentQuestionVersion</code>	Field Type <code>AssessmentQuestionVersion</code> Description The object that stores the question versions for the assessment questions.
<code>dataType</code>	Field Type <code>string</code> Description Required. The data type of the assessment question.
<code>developerName</code>	Field Type <code>string</code> Description Required. The developer name of the assessment question. 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.
<code>formulaResponseDataType</code>	Field Type <code>string</code> Description Specifies the data type of the question response calculated by a formula.
<code>name</code>	Field Type <code>string</code> Description Required. The name of the record.

Field Name	Description
questionCategory	Field Type string Description Required. Stores the question category.
relatedQuestion	Field Type string Description Specifies the related question. Used to define a question hierarchy.

AssessmentQuestionVersion

Stores the question versions for the assessment questions.

Field Name	Description
additionalInformation	Field Type string Description The additional details for a UI element, such as the disclosure text.
description	Field Type string Description The description for the assessment question. This text isn't rendered on the assessment.
helpText	Field Type string Description The text that's added as an info bubble in the UI element related to the assessment question.
isActive	Field Type boolean Description Required. Indicates whether the current version of the assessment question is set to active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .

Field Name	Description
name	Field Type string Description Required. Name of the assessment question version record.
optionSourceResponseValue	Field Type boolean Description Indicates whether the response value source for an assessment question is configured as custom (<code>true</code>) or sObject in the OmniStudio designer (<code>false</code>). The default value is <code>false</code> .
questionText	Field Type string Description Required. The assessment question text. Contains the label for the assessment question that appears on the assessment.
responseValues	Field Type string Description Holds the values to be defined in the picklist, multiselect picklist, or radio buttons.
status	Field Type string Description Required. Status of the assessment question version. Possible values are Draft, Active, or Archived.
versionNumber	Field Type int Description Required. The assessment question version number.

Declarative Metadata Sample Definition

The following is an example of an AssessmentQuestion component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AssessmentQuestion
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <assessmentQuestionVersion>
    <additionalInformation>ParentQuestionDevName AI</additionalInformation>
    <description>ParentQuestionDevName Desc</description>
    <helpText>ParentQuestionDevName HT</helpText>
    <isActive>true</isActive>
    <name>ParentQuestionDevName</name>
    <optionSourceResponseValue>true</optionSourceResponseValue>
    <questionText>ParentQuestionDevName Text</questionText>
    <status>Active</status>
    <versionNumber>1</versionNumber>
  </assessmentQuestionVersion>
  <dataType>DateTime</dataType>
  <developerName>ParentQuestionDevName</developerName>
  <name>ParentQuestionDevName</name>
  <questionCategory>Demographic</questionCategory>
</AssessmentQuestion>
```

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>AssessmentQuestion</name>
  </types>
  <version>55.0</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](#).

You can also deploy and retrieve the metadata API using Workbench. See [Use Metadata API to retrieve and deploy using Workbench](#).

Usage

Before you retrieve assessment questions, we recommend that you review these considerations.

- When you retrieve an assessment question, you also get the related assessment question version with the status Active.
 -  **Note:** If an active assessment question version doesn't exist for the assessment question, then the latest assessment question version with Status as Draft is retrieved.
- The value for the `<status>` tag in the XML definition must match the status of the related assessment question version.

- If an assessment question has a related assessment question (parent question), the XML definition must include the developer name of the related assessment question.
- If the fields of an assessment question contain values, the XML definition must contain tags with those values when retrieving it.

Before you deploy assessment questions, we recommend that you review these considerations.

- If the Related Question isn't available in the target org, deploying the assessment question fails.
- If an assessment question with the same developer name exists in the target org, deploying the assessment question updates the values of the other fields in the target org.
- If the `<versionNumber>` tag is present in the XML definition of an assessment question, deploying creates a version for that question in the target org.
- If the Related Questions aren't available in target org but available in the package, then deploying the questions inserts the Related Questions in the correct order.

AssessmentQuestionSet

Represents the container object for Assessment Questions.

Parent Type

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

File Suffix and Directory Location

AssessmentQuestionSet components have the suffix `.AssessmentQuestionSet` and are stored in the `AssessmentQuestionSets` folder.

Version

AssessmentQuestionSet components are available in API version 55.0 and later.

Fields

Field Name	Description
<code>assessmentQuestionDeveloperNames</code>	Field Type string[] Description The developer names for the assessment question. 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.
<code>developerName</code>	Field Type string

Field Name	Description
	Description Required. The developer name for the assessment question set. 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.
name	Field Type string Description Required. The question set name.

Declarative Metadata Sample Definition

The following is an example of an AssessmentQuestionSet component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AssessmentQuestionSet
  xmlns="http://soap.sforce.com/2006/04/metadata">
  <developerName>QuestionSetDevName</developerName>
  <name>QuestionSetName</name>
  <assessmentQuestionDeveloperNames>QuestionDevName</assessmentQuestionDeveloperNames>
</AssessmentQuestionSet>
```

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>AssessmentQuestion</name>
  </types>
  <types>
    <members>*</members>
    <name>AssessmentQuestionSet</name>
  </types>
  <version>55.0</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.

You can also deploy and retrieve the metadata API using Workbench. See [Use Metadata API to retrieve and deploy using Workbench](#).

Usage

Before you retrieve assessment question sets, we recommend that you review these considerations.

- When retrieving an assessment question set, if its fields contain values, then the XML definition must contain tags with those values.
- When retrieving an assessment question set, if that set is associated with multiple questions, then the XML definition must contain developer names of all the associated questions.

Before you deploy assessment question sets, we recommend that you review these considerations.

- When deploying an assessment question set, if an assessment question set with the same developer name doesn't exist in the target org, deploying creates one with that name.
- If an assessment question set with the same developer name exists in the target org, then deploying the question set updates the values of the other fields in the target org.
- If the questions associated with the assessment question set don't exist in the target org, deploying the assessment question set fails.
- If the questions associated with the assessment question set don't exist in the target org but are available in the package, then deploying the assessment question sets inserts the questions in the correct order.

OmniScript

Represents the processes with fast, personalized, and consistent responses. This type extends the Metadata metadata type and inherits its `fullName` field.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

File Suffix and Directory Location

OmniScript components have the suffix `omniScript` and are stored in the `omniScripts` folder.

Version

OmniScript components are available in API version 56.0 and later.

Special Access Rules

To use this metadata type, you must enable the Discovery Framework feature in your Salesforce org.

Fields

Field Name	Description
<code>customHtmlTemplates</code>	Field Type string

Field Name	Description
	Description The angular OmniScript template definitions.
customJavaScript	Field Type string Description The custom JavaScript used for an OmniScript.
designerCustomizationType	Field Type string Description The OmniStudio designer customization type.  Note: For Discovery Framework, the customization type is <i>discoveryframework</i> .
elementTypeComponentMapping	Field Type string Description Map of custom element overrides.
isActive	Field Type boolean Description Indicates whether the OmniScript is active (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
isIntegrationProcedure	Field Type boolean Description Indicates whether OmniScript is an Integration Procedure (<code>true</code>) or OmniScript metadata (<code>false</code>). The default value is <code>false</code> .
isMetadataCacheDisabled	Field Type boolean Description Indicates whether metadata cache for the integration procedure is disabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code> .
isOmniScriptEmbeddable	Field Type boolean

Field Name	Description
	Description Indicates whether the OmniScript can be embedded in other OmniScripts (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>
<code>isTestProcedure</code>	Field Type boolean Description Indicates whether OmniScript is a test procedure setting (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>
<code>isWebCompEnabled</code>	Field Type boolean Description Indicates whether web component OmniScript (not Angular) is enabled (<code>true</code>) or not (<code>false</code>). The default value is <code>false</code>
<code>language</code>	Field Type string Description Required. The language of the OmniScript.
<code>lastPreviewPage</code>	Field Type string Description The last page previewed in the OmniScript designer.
<code>name</code>	Field Type string Description Required. The name of the OmniScript.
<code>namespace</code>	Field Type string Description The namespace associated with this OmniScript record.
<code>omniProcessElements</code>	Field Type OmniProcessElement[] Description The OmniProcessElements associated with the OmniScript.

Field Name	Description
omniProcessKey	Field Type string Description The integration procedure Type_SubType value.
omniProcessType	Field Type OmniProcessType (enumeration of type string) Description Required. Integration Procedure or OmniScript. Possible value is: • OmniScript
overrideKey	Field Type string Description Reserved for future use.
propertySetConfig	Field Type string Description The configuration information associated with the OmniScript.
questionDevName	Field Type string Description The developer name of the assessment question in the OmniScript.  Note: This field is relevant only for OmniScripts with <code>designerCustomizationType</code> as <i>discoveryframework</i>.
requiredPermission	Field Type string Description The required permissions to execute the integration procedure.
responseCacheType	Field Type string Description Response cache used for the integration procedure (session or Org).
subType	Field Type string

Field Name	Description
	Description Required. The OmniScript sub type value.
type	Field Type string Description Required. The OmniScript type value.
uniqueName	Field Type string Description Required. The unique name for the OmniScript as Type_SubType_Language_VersionNumber.
versionNumber	Field Type string Description Required. The OmniScript version number.
webComponentKey	Field Type string Description Internal unique key for the generated Lightning Web Components (LWC).

OmniProcessElement

Represents the OmniScript element associated with the OmniScript.

Field Name	Description
childElements	Field Type OmniProcessElement[] Description The child elements associated with the OmniProcessElement.
description	Field Type string

Field Name	Description
	Description The description of the OmniProcessElement.
designerCustomizationType	Field Type string Description The OmniStudio designer customization type.  Note: To create assessment questions using the Discovery Framework feature, use the customization type as <i>discoveryframework</i> .
embeddedOmniScriptKey	Field Type string Description The ID of the embedded OmniScript
isActive	Field Type boolean Description Indicates whether the status of the OmniProcessElement is active (<code>true</code>) or not (<code>false</code>).
isOmniScriptEmbeddable	Field Type boolean Description Indicates whether the OmniScript with the OmniProcessElement can be embedded in other OmniScripts (<code>true</code>) or not (<code>false</code>).
level	Field Type double Description The vertical level in which the OmniProcessElement occurs on the OmniScript.
name	Field Type string Description Required. The name of the OmniProcessElement.
omniProcessVersionNumber	Field Type double Description The related OmniProcess version.

Field Name	Description
parentElementName	Field Type string Description The name of the parent OmniProcessElement.
parentElementType	Field Type string Description The type of the parent OmniProcessElement.
propertySetConfig	Field Type textarea Description The property set of the OmniProcessElement.
QuestionDevName	Field Type string Description The developer name of the assessment question in the OmniScript.  Note: This field is relevant only for OmniScripts with <code>designerCustomizationType</code> as <i>discoveryframework</i> .
sequenceNumber	Field Type double Description The horizontal level in which the OmniProcessElement occurs on the OmniScript.
type	Field Type string Description The OmniProcessElement type. For example, Text and TextArea.

Declarative Metadata Sample Definition

The following is an example of a OmniScript component.

```
<?xml version="1.0" encoding="UTF-8"?>
<OmniScript
  xmlns="http://soap.sforce.com/2006/04/metadata">

  <elementTypeComponentMapping>{&quot;ElementTypeToHTMLTemplateList&quot;;[]}</elementTypeComponentMapping>

  <isActive>false</isActive>
```



```

<IntegrationProcedure>false</IntegrationProcedure>
<MetadataCacheDisabled>>false</MetadataCacheDisabled>
<OmniScriptEmbeddable>>false</OmniScriptEmbeddable>
<TestProcedure>>false</TestProcedure>
<WebCompEnabled>>true</WebCompEnabled>
<language>English</language>
<name>OS5</name>
<omniProcessElements>
  <parentElementType></parentElementType>
  <parentElementName></parentElementName>
  <description>test</description>
  <isActive>>true</isActive>
  <isOmniScriptEmbeddable>>false</isOmniScriptEmbeddable>
  <embeddedOmniScriptKey>key</embeddedOmniScriptKey>
  <designerCustomizationType></designerCustomizationType>
  <level>0.0</level>
  <name>Step1</name>
  <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
  <propertySetConfig>{&quot;label&quot;;:&quot;Step
you sure?&quot;;,&quot;saveLabel&quot;;:&quot;Save for
later&quot;;,&quot;saveMessage&quot;;:&quot;Are you sure you want to save it for
later?&quot;;,&quot;completeLabel&quot;;:&quot;Complete&quot;;,&quot;completeMessage&quot;;:&quot;Are
you sure you want to complete the
if
sequenceNumber>0.0</sequenceNumber>
<type>Step</type>
<questionDevName></questionDevName>
</omniProcessElements>
<omniProcessElements>
  <isActive>>true</isActive>
  <level>0.0</level>
  <name>Step2</name>
  <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
  <isOmniScriptEmbeddable>>false</isOmniScriptEmbeddable>
  <propertySetConfig>{&quot;label&quot;;:&quot;Step
you sure?&quot;;,&quot;saveLabel&quot;;:&quot;Save for
later&quot;;,&quot;saveMessage&quot;;:&quot;Are you sure you want to save it for
later?&quot;;,&quot;completeLabel&quot;;:&quot;Complete&quot;;,&quot;completeMessage&quot;;:&quot;Are
you sure you want to complete the
script?&quot;;,&quot;instruction&quot;;:&quot;&quot;;,&quot;showPersistentComponent&quot;;:[true,
if
sequenceNumber>1.0</sequenceNumber>
<type>Step</type>

```

```
<questionDevName></questionDevName>  
</omniProcessElements>  
<omniProcessElements>  
  <isActive>>true</isActive>  
  <level>0.0</level>  
  <name>Step3</name>  
  <omniProcessVersionNumber>0.0</omniProcessVersionNumber>  
  <isOmniScriptEmbeddable>>false</isOmniScriptEmbeddable>  
  
  <sequenceNumber>2.0</sequenceNumber>  
  <type>Step</type>  
  <questionDevName></questionDevName>  
</omniProcessElements>  
</omniProcessType>OmniScript</omniProcessType>  
  
<subType>SBT5</subType>  
<type>Type5</type>  
<omniProcessKey>Type5_SBT5</omniProcessKey>  
<uniqueName>Type5_SBT5_English_1</uniqueName>  
<versionNumber>1.0</versionNumber>  
<nameSpace></nameSpace>  
<lastPreviewPage>LastPage</lastPreviewPage>  
<customHtmlTemplates></customHtmlTemplates>  
<customJavaScript></customJavaScript>  
<description>TestOS</description>  
<requiredPermission>OmniStudioAdmin</requiredPermission>  
<responseCacheType>Org Cache</responseCacheType>  
<designerCustomizationType></designerCustomizationType>  
<webComponentKey>WebComponentKey</webComponentKey>  
<overrideKey></overrideKey>  
</OmniScript>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<!--
    ~ Copyright 2020 Salesforce, Inc.
    ~ All Rights Reserved
    ~ Company Confidential
-->
```

```
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>*</members>
    <name>OmniScript</name>
  </types>
  <version>56.0</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](#).

Usage Type

Before you retrieve or deploy OmniScripts, we recommend that you review these considerations.

- If the `DesignerCustomizationType` of the OmniScript is *discoveryframework*, then the questions in the OmniScript must be within the `<questionDevName>` tag in the metadata definition file.
- If any question associated with the Omniscrypt doesn't exist in the target org or, if the active version of that question doesn't exist in the target org, then deploying the OmniScript fails.

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" : [ "a03B0000000735LrIAI", "a03B0000000735LsIAI",
"a03B0000000735LtIAI" ],
  "personAccountsIdList" : [ "001B0000001K8Zx5IAF" ],
  "errors" : [ ],
  "status" : "SUCCESS",
  "financialAccountsIdList" : [ "a0EB0000000227WoMAI", "a0EB0000000227WpMAI",
"a0EB0000000227WqMAI" ]
}
```

Get Assessment Response Summary

Get Assessment Response Summary makes it easy to use a flow to trigger server-side document generation using Docgen.

In Discovery Framework, the responses from an assessment are stored in the AssessmentQuestionResponse object and the form metadata stays in OmniScript. You can use this invocable action to pass assessment summary data to the downstream processes. This invocable action provides a summary JSON that can be consumed in Docgen workflows to generate documents.

The Get Assessment Response Summary invocable action takes assessment ID as the input to get the OmniProcess ID, which is used to retrieve the OmniProcess elements. The assessment ID also retrieves the assessment response and merges the response with the OmniProcess elements to create an assessment summary response in JSON.

This object is available in API version 56.0 and later.

Supported REST HTTP Methods

- URI
- /services/data/v56.0/actions/standard/getAssessmentResponseSummary
- Formats
- JSON
- HTTP Methods
- GET
- Authentication
- Authorization: Bearer token

Inputs

Input	Details
assessmentId	Type ID Description Required. The ID of the assessment record for which to summarize responses.

Outputs

Output	Details
assessmentResponseSummary	Type string Description A JSON string containing the summary assessment question texts and responses for the specified assessment record. The response summary structure follows the structure of the OmniScript.

Usage

Sample Input

When exposing the Get Assessment Response Summary invocable action in a REST API, you can use the following format to pass input, which includes the assessmentId and its value.

```
{
  "inputs" : [ {"assessmentId" : "0U3RO00000005FN0AY"} ]
}
```

Sample Output

In this example, the first line indicates the OmniScript type, subtype, and language. For each step, there are multiple questions that appear in the OmniScript. You can use this information in a downstream process, such as generation of PDF document using Docgen capability.

```
"KYC_Individual_English": {
  "Step1": {
    "label": "Identity Details",
    "value": {
      "LC_Survey_Question_2": {
        "label": "Full Name",
        "value": "Joe Smith"
      },
      "DateofBirth_m": {
        "label": "Date of Birth",
        "value": "Thu Jul 27 00:00:00 GMT 2000"
      },
      "Gender_m": {
        "label": "Gender",
        "value": "Female"
      },
      "EmailAddress_m": {
        "label": "Email Address",
        "value": "Joe.Smith@company.com"
      },
      "PAN": {
        "label": "PAN",
        "value": "QWEASDZXC"
      }
    }
  },
  "Step2": {
    "label": "Address Details",
    "value": {
      "Address_CorrespondenceAdd_Corporate": {
        "label": "Address of Correspondence",
        "value": "100 Some St, San Francisco, CA 12345, United States"
      },
      "Address_ContactDetails_Corporate": {
        "label": "Telephone/Mobile",
        "value": "1616111233"
      },
      "Alternate_Contact": {
        "label": "Alternate Mobile Number",

```

```

        "value": "1911212123"
      }
    },
    "Step3": {
      "label": "Account Declaration",
      "value": {
        "Account_declaration": {
          "label": "I declare that I have following deposit accounts with your/
other bank's branches :",
          "value": [
            {
              "Bank": {
                "label": "Bank",
                "value": "Acme1"
              },
              "Branch": {
                "label": "Branch",
                "value": "Mission St"
              },
              "Type_of_Account": {
                "label": "Type of Account",
                "value": "Checking"
              },
              "Account_Number": {
                "label": "Account Number",
                "value": "12345678"
              }
            },
            {
              "Bank": {
                "label": "Bank",
                "value": "Acme2"
              },
              "Branch": {
                "label": "Branch",
                "value": "Mission St"
              },
              "Type_of_Account": {
                "label": "Type of Account",
                "value": "Savings"
              },
              "Account_Number": {
                "label": "Account Number",
                "value": "1234567890"
              }
            }
          ]
        }
      }
    },
    "Step4": {
      "label": "Declaration",
      "value": {

```



```
    "Declaration_m": {  
      "label": "The customer declares and certifies that the information in this  
form is true and correct. Any pre-filled sections of this form must be reviewed prior  
to signing and submitting, to ensure the information accurately conveys the new  
account details.",  
      "value": "true"  
    }  
  }  
}  
}
```

FINANCIAL SERVICES CLOUD TOOLING API OBJECTS

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

[ClaimFinancialSettings](#)

Represents the configuration settings for Insurance Claim Financial Services. This object is available in API version 57.0 and later.

[RelationshipGraphDefinition](#)

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works. This object is available in API version 55.0 and later.

[Discovery Framework Tooling API Objects](#)

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

ClaimFinancialSettings

Represents the configuration settings for Insurance Claim Financial Services. This object is available in API version 57.0 and later.

 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
ClaimCovPendingAuthStatus	Type string
	Properties Create, Filter, Group, Sort, Update
	Description The status of pending financial authority for claim coverage.

Field	Details
ClaimPendingAuthorityStatus	Type string Properties Create, Filter, Group, Sort, Update Description The status of pending financial authority for claim.
ClmCovPymtDtlPendAuthSts	Type string Properties Create, Filter, Group, Sort, Update Description The status of pending financial authority for claim coverage payment detail.
DeveloperName	Type string Properties Create, Filter, Group, Sort, Update Description The unique name for the claim financial settings object.
Language	Type picklist Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update Description The language of the claim financial settings.
ManageableState	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Indicates the manageable state of the specified component that is contained in a package. Possible values are: • <code>beta</code>—Managed-Beta • <code>deleted</code>—Managed-Proposed-Deleted • <code>deprecated</code>—Managed-Proposed-Deprecated • <code>deprecatedEditable</code>—SecondGen-Installed-Deprecated • <code>installed</code>—Managed-Installed

Field	Details
	• <code>installedEditable</code>—SecondGen-Installed-Editable • <code>released</code>—Managed-Released • <code>unmanaged</code>—Unmanaged
MasterLabel	Type string Properties Create, Filter, Group, Sort, Update Description The unique label that identifies the claim financial settings throughout the Salesforce user interface.
NamespacePrefix	Type string Properties Filter, Group, Nillable, Sort Description Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

RelationshipGraphDefinition

Represents a definition of a graph that you can configure in your organization to traverse object hierarchies and record details, giving you a glimpse of how your business works. This object is available in API version 55.0 and later.



Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

The Financial Services Cloud permission set license is required to access this object.

Fields

Field	Details
DeveloperName	Type string Properties Filter, Group, Sort 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. Label is Record Type Name.
FullName	Type string Properties Create, Group, Nillable Description The full name of the associated relationship graph in Metadata API. The full name can include a namespace prefix. 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.
IsActive	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether the relationship graph is available for use (<code>true</code>) or not (<code>false</code>). The default value is <code>true</code>.  Note: This field is read-only in API version 55.0.
IsTemplate	Type boolean Properties Defaulted on create, Filter, Group, Sort Description Indicates whether you can configure this relationship graph as a template (<code>true</code>) or not (<code>false</code>).

Field	Details
	The default value is <code>false</code> . In the UI, this field is Set as Template .
Language	Type picklist Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort Description The language of the relationship graph instance. Possible values are: • <code>da</code>—Danish • <code>de</code>—German • <code>en_US</code>—English • <code>es</code>—Spanish • <code>es_MX</code>—Spanish (Mexico) • <code>fi</code>—Finnish • <code>fr</code>—French • <code>it</code>—Italian • <code>ja</code>—Japanese • <code>ko</code>—Korean • <code>nl_NL</code>—Dutch • <code>no</code>—Norwegian • <code>pt_BR</code>—Portuguese (Brazil) • <code>ru</code>—Russian • <code>sv</code>—Swedish • <code>th</code>—Thai • <code>zh_CN</code>—Chinese (Simplified) • <code>zh_TW</code>—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: • <code>beta</code> • <code>deleted</code> • <code>deprecated</code> • <code>deprecatedEditable</code> • <code>installed</code>

Field	Details
	- installedEditable - released - unmanaged
MasterLabel	Type string Properties Filter, Group, Sort Description Required. Label for the relationship graph instance. In the UI, this field is Label.
Metadata	Type RelationshipGraphDefinition Properties Create, Nillable, Update Description The relationship graph'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 refer to a component in a managed package by using the <i>namespacePrefix__componentName</i> 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.
RootObjectId	Type string

Field	Details
	Properties Filter, Group, Sort Description The ID of the root object, which is the starting point or parent node in the relationship graph. For example, in a graph that displays how accounts, contacts, and financial goals are related, the account object is the root object, and its ID is the <code>RootObjectId</code>. This field is a relationship field.  Note: Reserved for internal use. Relationship Name RootObject Relationship Type Lookup Refers To EntityDefinition

Discovery Framework Tooling API Objects

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see [Introducing Tooling API](#).

[AssessmentQuestionConfig](#)

Represents the assessment question record metadata configuration. This object is available in API version 56.0 and later.

[AssessmentQuestionSetConfig](#)

Represents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

AssessmentQuestionConfig

Represents the assessment question record metadata configuration. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

`GET`, `HEAD`, `Query`

Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

Fields

Field	Details
DeveloperName	Type string Properties Filter, Group, Sort 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 slows down while Salesforce generates one for each record.
Language	Type picklist Properties Filter, Group, Restricted picklist, Sort Description Language of the assessment question.
ManageableState	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Indicates the manageable state of the specified component that 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

Field	Details
MasterLabel	Type string Properties Filter, Group, Sort Description Label of the assessment question.
NamespacePrefix	Type string Properties Filter, Group, Nillable, Sort Description Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

AssessmentQuestionSetConfig

Represents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

GET, HEAD, Query

Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

Fields

Field	Details
DeveloperName	Type string Properties Filter, Group, Sort 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

Field	Details
	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 slows down while Salesforce generates one for each record.
Language	Type picklist Properties Filter, Group, Restricted picklist, Sort Description Language of the assessment question set.
ManageableState	Type picklist Properties Filter, Group, Nillable, Restricted picklist, Sort Description Indicates the manageable state of the specified component that 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, Sort Description Label of the assessment question set.
NamespacePrefix	Type string

Field	Details
	Properties Filter, Group, Nillable, Sort
	Description Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

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
<code>AccountRecordTypeNamespace__c</code>	Type string Properties Filter, Group, Nillable, Sort Description Namespace for Account record type being mapped.
<code>AccountRecordType__c</code>	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
<code>AccountRecordType__c</code>	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.
<code>AccountRecordTypeNamespace__c</code>	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.trigger`, 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 after 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.

DATA PROCESSING ENGINE AND MONITOR WORKFLOW SERVICES

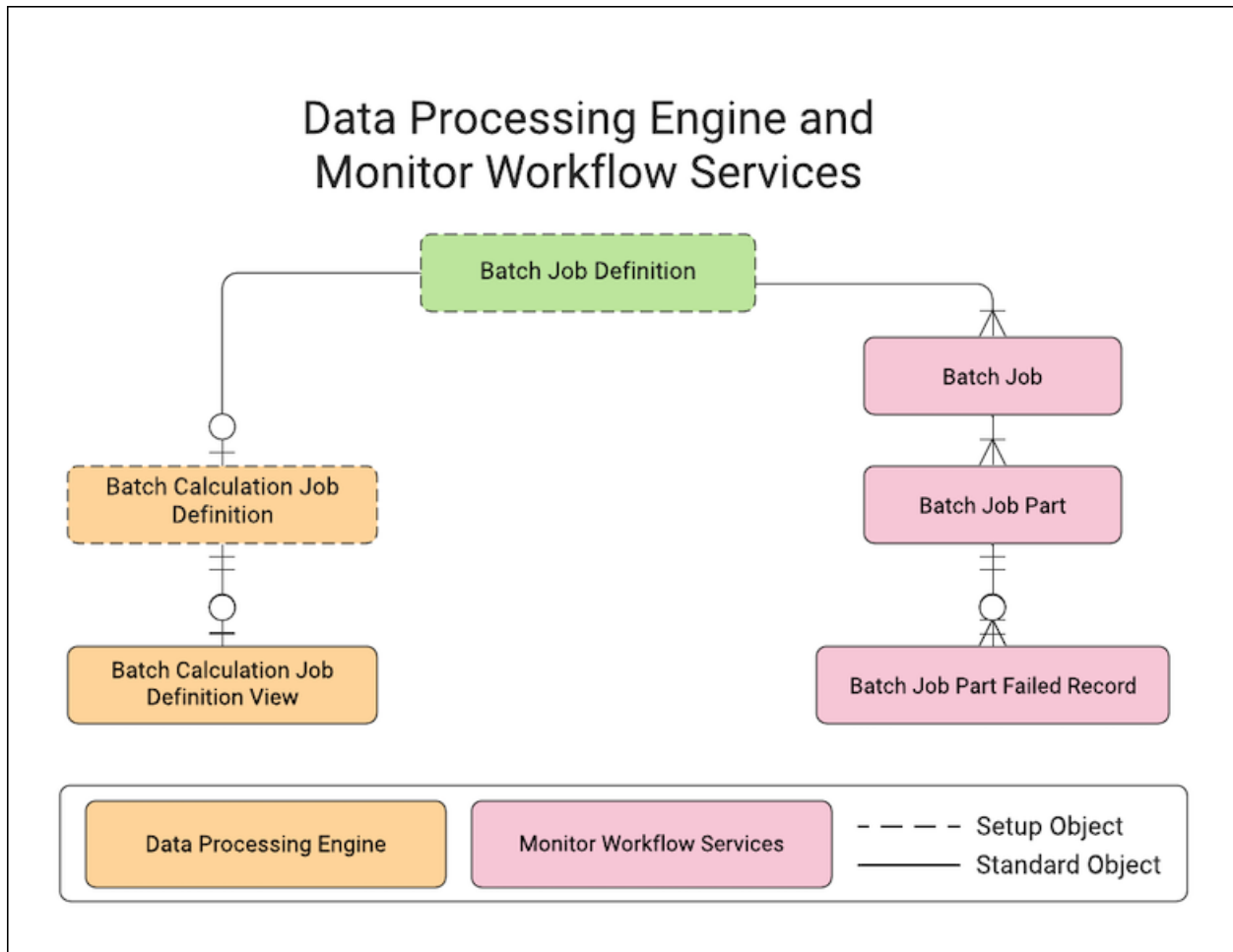
Data Processing Engine helps you transform data that's available in your Salesforce org and write back the transformation results as new or updated records. You can transform the data for standard and custom objects using Data Processing Engine definitions. After you activate a Data Processing Engine 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. Data Processing Engine isn't available for Salesforce orgs in Government Cloud or Government Cloud Plus.



Here is the list of developer resources you can use for Data Processing Engine:

- Standard Object
 - BatchCalcJobDefinitionView
- Setup Objects
 - BatchCalcJobDefinition
 - BatchJobDefinition

To know more about setup objects, see the [Tooling API Developer Guide](#).

- Invocable Actions
 - dataProcessingEngineAction
- Platform Event
 - BatchJobStatusChangedEvent

Here is the list of standard objects for Monitor Workflow Services:

- BatchJob
- BatchJobPart
- BatchDataPartFailedRecord

Data Processing Engine and Monitor Workflow Services

To know more about Data Processing Engine, see the [Data Processing Engine help](#).