

# Nonprofit Cloud Developer Guide

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# **CHAPTER 1** Introduction to Nonprofit Cloud

Use Nonprofit Cloud to fund, deliver, and measure impact with one integrated platform. Nurture your most important relationships, and break down silos between teams with a single source of truth about your donors, stakeholders, and constituents.

### EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

# **CHAPTER 2** Nonprofit Cloud Data Model

### In this chapter ...

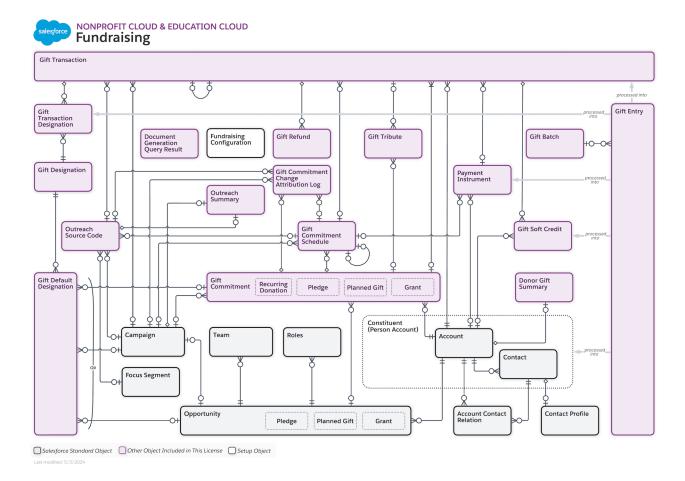
- Fundraising Data Model
- Program
   Management Data
   Model
- Case Management Data Model
- Outcome
   Management Data
   Model
- Grantmaking and Budget Management Data Model
- Group Membership and Households Data Model
- Provider
  Management Data
  Model

Learn about the objects and relationships within Nonprofit Cloud

# Fundraising Data Model

Learn about the objects and relationships within the Fundraising data model.

The Fundraising data model provides a set of objects and fields that you can use to store and manage information about constituents, campaigns, and donations.



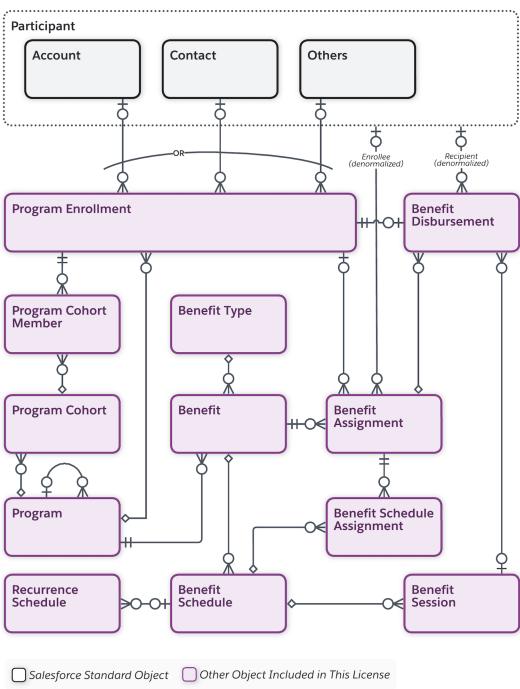
To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**, or view the Fundraising data model.

## Program Management Data Model

Learn about the objects and relationships within the Program Management data model.

The Program Management data model provides a set of objects and fields that you can use to store and manage information about programs and benefits.



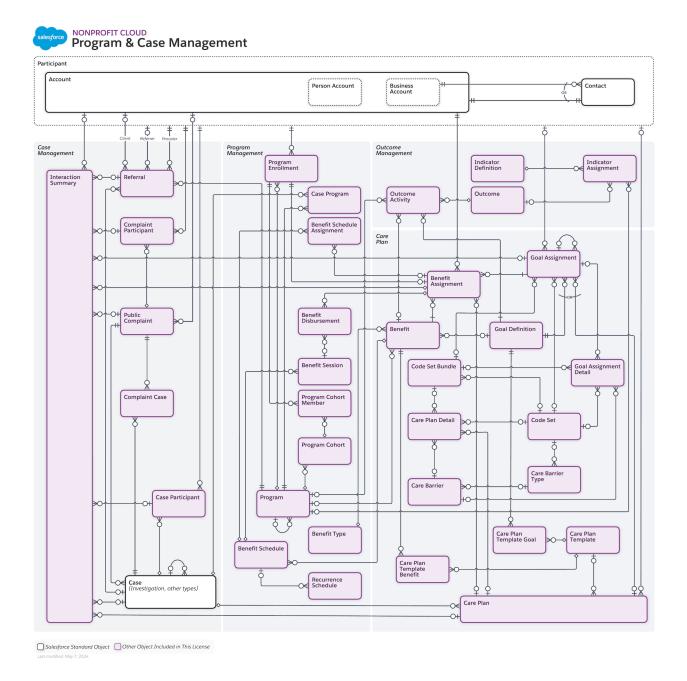


To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**, or view Program Management.

# Case Management Data Model

Learn about the objects and relationships within the Case Management data model.

The Case Management data model provides a set of objects and fields that you can use to store and manage information about cases and care plans.



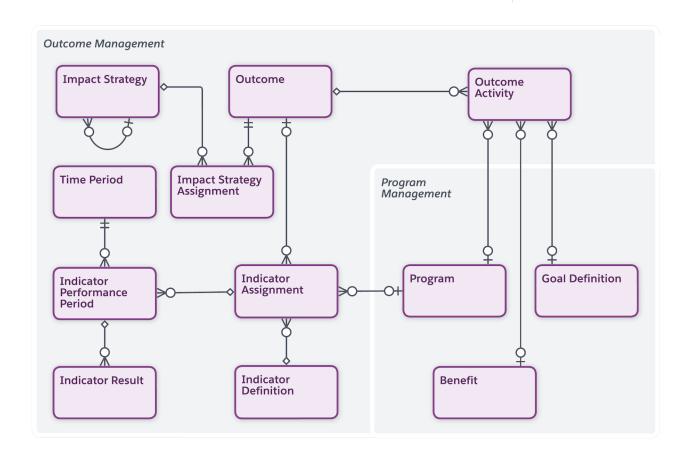
To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**, or view the Program & Case Management data model.

# Outcome Management Data Model

Learn about the objects and relationships in the Outcome Management data model.

### EDITIONS

Available in: Lightning Experience. View product and edition availability.



To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**.

# Grantmaking and Budget Management Data Model

Learn about the objects and relationships within the Grantmaking and Budget Management data model.

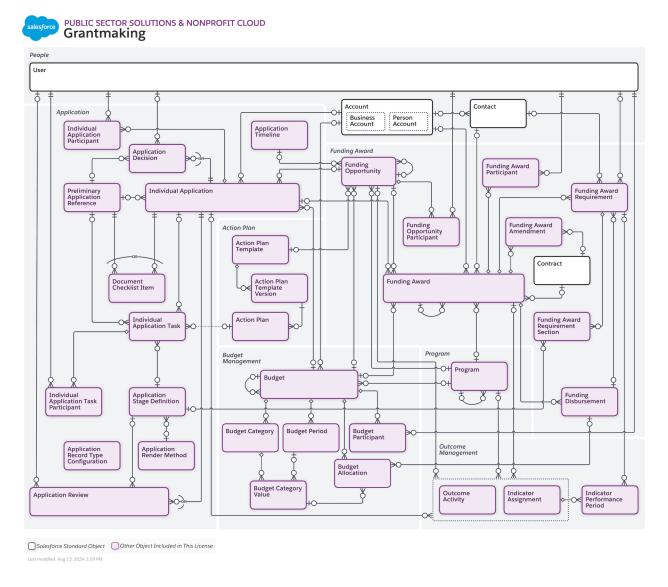
The Grantmaking and Budget Management data model provides a set of objects and fields that you can use to store and manage information about grants you award and the budgets associated with them.

### EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions in Nonprofit Cloud for Grantmaking

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions in Public Sector Solutions



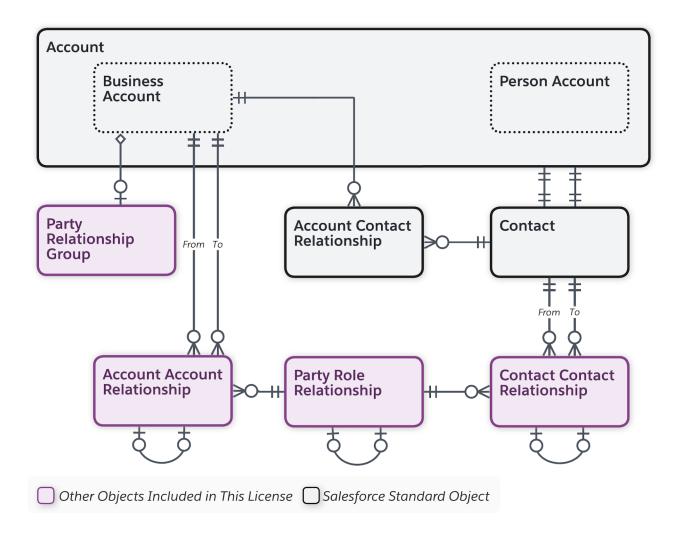
To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab** or view the Grantmaking data model architecture.

# Group Membership and Households Data Model

Learn about the objects and relationships used for group memberships, also known as party relationship groups.

### EDITIONS

Available in: Lightning Experience. View product and edition availability.



To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab**.

# Provider Management Data Model

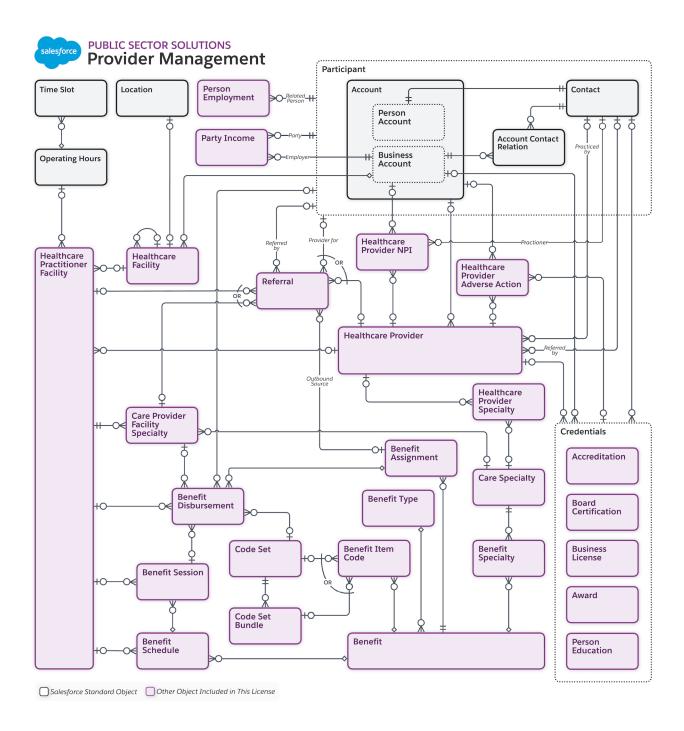
Learn about the objects and relationships used for provider management in Public Sector Solutions.

### EDITIONS

Available in: Lightning Experience

Available in:

**Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions



To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab** or view the Provider Management data model architecture.

# **CHAPTER 3** Fundraising

### In this chapter ...

- Fundraising Standard Objects
- Fundraising Fields on Other Objects
- Fundraising Business APIs
- Fundraising Invocable Actions
- Fundraising Metadata API Types
- Fundraising Tooling API Objects

This guide provides information about the objects and APIs that Fundraising uses.

### EDITIONS

Available in: Lightning Experience

Available in: **Enterprise Unlimited** and **Developer**Editions.

### **Fundraising Standard Objects**

Fundraising data model provides objects and fields to manage gifts and donors for your nonprofit or education organization.

### DocGenerationQueryResult

Represents information, including a report, template, and process lookup, for a document generation job. This object is available in API version 61.0 and later.

### DonorGiftSummary

Represents gift summaries for accounts and contacts. This object is available in API version 59.0 and later.

#### GiftBatch

Represents the details and status of the batch of gifts. This object is available in API version 59.0 and later.

#### GiftCommitment

Represents the commitment made by a donor. This object is available in API version 59.0 and later.

#### GiftCmtChangeAttrLog

Represents the history of changes to a Gift Commitment over time with attribution to the source campaign or source code attributed to that change. This object is available in API version 60.0 and later.

#### GiftCommitmentSchedule

Represents the schedule for fulfilling the commitment. This object is available in API version 59.0 and later.

#### GiftDefaultDesignation

Represents the default designation for gifts that originate from an opportunity, campaign, or commitment. This object is available in API version 59.0 and later.

### GiftDefaultSoftCredit

Represents the default allocation for soft credits on gift commitment transactions that are created by a recurrence engine and credited to constituents who influenced the commitment. This object is available in API version 62.0 and later.

#### GiftDesignation

Represents a designation that can be assigned to a gift transaction. This object is available in API version 59.0 and later.

### GiftEntry

Represents gifts created individually or in a batch before they're processed and logged in their target records. After processing, these records serve as an audit trail for gift transactions. This object is available in API version 59.0 and later.

#### GiftRefund

Represents a refund of a gift. This object is available in API version 59.0 and later.

#### GiftSoftCredit

Represents the soft credit attributed to a person or organization for the gift transaction. This object is available in API version 59.0 and later.

#### GiftTransaction

Represents a completed transaction from a gift. This object is available in API version 59.0 and later.

#### GiftTransactionDesignation

Represents a junction between a gift transaction and a gift designation. This object is available in API version 59.0 and later.

#### GiftTribute

Represents the details and status of the gift tribute. This object is available in API version 59.0 and later.

### **EDITIONS**

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions.

### OutreachSourceCode

Represents information about a source code that's associated with an outreach campaign. This object is available in API version 59.0 and later.

### OutreachSummarv

Represents a summary of results of the outreach campaign. This object is available in API version 59.0 and later.

### PaymentInstrument

Represents the details related to the Payment Instrument used to complete the transaction. This object is available in API version 60.0 and later.

### PartyPhilanthropicAssessment

Represents a formalized assessment of wealth when a rating takes place, such as a third-party wealth assessment, a property valuation, a financial asset assessment, or an internal assessment. This object is available in API version 63.0 and later.

### PartyPhilanthropicIndicator

Represents an unconfirmed or soft indication that highlights a person's wealth or growth potential. This object is available in API version 63.0 and later.

### PartyPhilanthropicMilestone

Represents philanthropic activities and financial status for a period of time. This object is available in API version 63.0 and later.

### PartyPhilanthropicOccurrence

xxx This object is available in API version XX.0 and later.

### DocGenerationQueryResult

Represents information, including a report, template, and process lookup, for a document generation job. This object is available in API version 61.0 and later.

### **Supported Calls**

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

### **Special Access Rules**

This object is available only if the FundraisingAccess license is enabled and the DocGen User permission set and the Fundraising User system permission are assigned to users.

### **Fields**

**C:** - 1 -1

Field	Details
DocumentGenerationProcessId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The process associated with the document creation.

Fundraising DocGenerationQueryResult

Field	Details
	This field is a relationship field.
	Relationship Name DocumentGenerationProcess
	Relationship Type Lookup
	Refers To DocumentGenerationProcess
DocumentTemplateId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The template associated with the document creation.
	This field is a relationship field.
	Relationship Name DocumentTemplate
	Relationship Type Lookup
	Refers To DocumentTemplate
Name	Туре
	string
	Properties  Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the batch query job.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup

Field	Details		
	Refers To		
	Group, User		
ReportFolderId	Туре		
	reference		
	Properties		
	Create, Filter, Group, Nillable, Sort, Update		
	Description		
	The report folder associated with the document generation query result.		
	This is a relationship field and is available from API version 62.0 and later.		
	Relationship Name		
	ReportFolder		
	Refers To		
	Folder		
RunDateTime	Туре		
	dateTime		
	Properties		
	Create, Defaulted on create, Filter, Sort, Update		
	Description		
	The date and time when the query and job was run.		

### **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.

### ${\bf DocGenerationQueryResultChangeEvent}$

Change events are available for the object.

### DocGenerationQueryResultFeed

Feed tracking is available for the object.

### DocGenerationQueryResultHistory

History is available for tracked fields of the object.

### ${\bf DocGenerationQueryResultOwnerSharingRule}$

Sharing rules are available for the object.

### DocGenerationQueryResultShare

Sharing is available for the object.

### DonorGiftSummary

Represents gift summaries for accounts and contacts. This object is available in API version 59.0 and later.



(1) 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 Calls**

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

### **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

### **Fields**

Field	Details		
AverageGiftAmount	Туре		
	currency		
	Properties		
	Filter, Sort		
	Description		
	The average value of the gifts the donor directly contributed.		
	This value of this field is calculated using a formula: ( $ \begin{tabular}{ll} Total Gift Transaction Amount \\ / Gift Count ). \end{tabular} $		
BestGiftYear	Туре		
	string		
	Properties Control of the Control of		
	Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The year in which the donor gave the largest value of gifts. Data Processing Engine finds the year in which the donor gave the largest sum of paid gift transaction amounts. You can schedule this calculation to run on a regular basis.		
BookedPledges	Туре		
	currency		
	Properties		
	Create, Filter, Nillable, Sort, Update		
	Description		
	The total value of a donor's pledges that are fully accounted for. Data Processing Engine calculates this value by adding the amounts of the donor's pledges with		
	FormalCommitmentType = Written. You can schedule this calculation to run on a regular basis.		
	Available in API version 62.0 and later.		

Field	Details
CompositeRfmScore	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The score that represents the composite threshold of gift recency, gift frequency, and gift monetary value. Data Processing Engine calculates this value according to how you configure RFM Scoring. You can schedule this calculation to run on a regular basis.
	Available in API version 61.0 and later.
CurrentRecurringStartDate	<b>Type</b> date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date of the donor's first recurring gift transaction for their active recurring gift. Data
	Processing Engine finds the date of the donor's first paid transaction associated with a related recurring gift commitment that isn't closed. You can schedule this calculation to run on a regular basis.
CurrentYearGiftCount	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The number of gifts that the donor directly contributed this year. Data Processing Engine calculates this value by counting the paid gift transactions this calendar year. You can schedule this calculation to run on a regular basis.
CurrentYearSoftCreditCount	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The total number of gift soft credit records attributed to the donor this year.
	Available in API version 63.0 and later.
CurrentYearSoftCreditsAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details		
	Description		
	The total value of gift soft credits earned by the donor this year.		
	Available in API version 63.0 and later.		
DaysSinceLastGift	Туре		
	int -		
	<b>Properties</b> Filter, Group, Nillable, Sort		
	<b>Description</b> The number of days since the donor gave a direct contribution.		
	This value of this field is calculated using a formula:		
	<pre>IF(ISBLANK(TEXT(LastGiftDate)), NULL, TODAY() - LastGiftDate).</pre>		
DonorId	<b>Type</b> reference		
	Properties Create, Filter, Group, Sort		
	<b>Description</b> The person, household, or organization account associated with the donor gift summary.		
	This field is a relationship field.		
	Relationship Name Donor		
	Relationship Type  Master-Detail		
	Refers To Account		
FirstGiftAmount	<b>Type</b> currency		
	Properties  Create, Filter, Nillable, Sort, Update		
	<b>Description</b> The value of the first gift the donor directly contributed. Data Processing Engine calculates this value by finding the amount of the donor's first paid gift transaction. You can schedule this calculation to run on a regular basis.		
FirstGiftCampaignId	<b>Type</b> reference		
	Properties Create, Filter, Group, Nillable, Sort, Update		

Field	Details
	<b>Description</b> The first campaign to which the donor contributed. Data Processing Engine calculates this value by finding the campaign of the donor's first paid gift transaction related to a campaign. You can schedule this calculation to run on a regular basis.
	This field is a relationship field.
	Relationship Name FirstGiftCampaign
	Relationship Type Lookup
	Refers To Campaign
FirstGiftDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date of the donor's first direct contribution. Data Processing Engine calculates this value by finding the date of the donor's first paid gift transaction. You can schedule this calculation to run on a regular basis.
FirstRecurringStartDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date of the donor's first recurring gift transaction. Data Processing Engine calculates this value by finding the date of the donor's first paid gift transaction related to a recurring gift commitment. You can schedule this calculation to run on a regular basis.
FirstSoftCreditAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of the first gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the soft credit amount of the first paid gift transaction for which the donor receives soft credit. You can schedule this calculation to run on a regular

basis.

**Type** date

FirstSoftCreditDate

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date of the first gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the date of the first paid gift transaction for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.
FrequencyScore	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The score that represents the giving frequency of the donor. Data Processing Engine calculates this value according to how you configure RFM Scoring. You can schedule this calculation to run on a regular basis.
	Available in API version 61.0 and later.
GiftCount	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The total number of gifts the donor directly contributed. Data Processing Engine calculates this value by counting all of the donor's paid gift transactions. You can schedule this calculation to run on a regular basis.
GiftsLastYearAmount	<b>Type</b> currency
	Properties  Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total value of gifts that the donor directly contributed last year. Data Processing Engine calculates this value by adding the amounts of paid gift transactions from the last calendar year. You can schedule this calculation to run on a regular basis.
GiftsThisYearAmount	<b>Type</b> currency
	Properties  Create, Filter, Nillable, Sort, Update

Field D	etails
---------	--------

### Description

The total value of gifts that the donor directly contributed this year. Data Processing Engine calculates this value by adding the amounts of the donor's paid gift transactions from this calendar year. You can schedule this calculation to run on a regular basis.

### GiftsTwoYearsAgoAmount

### Type

currency

### **Properties**

Create, Filter, Nillable, Sort, Update

### Description

The value of gifts the donor directly contributed two years ago. Data Processing Engine calculates this value by adding the amounts of the donor's paid gift transactions from two calendar years ago. You can schedule this calculation to run on a regular basis.

### GivingLevel

### Type

picklist

### **Properties**

Create, Filter, Group, Nillable, Sort, Update

### Description

The range within which the donor's total contributions fall for the current year.

Possible values are:

- \$25,000,000+
- \$10,000,000-\$24,999,999
- \$5,000,000-\$9,999,999
- \$1,000,000-\$4,999,999
- \$250,000-\$999,999
- \$100,000-\$249,999
- \$50,000-\$99,999
- \$25,000-\$49,999
- \$10,000-\$24,999
- \$5,000-\$9,999
- \$2,500-\$4,999
- \$1,000-\$2,499
- \$500-\$999
- \$100-\$499
- Under \$100

### HighestGiftAmount

### Type

currency

Field Details

### **Properties**

Create, Filter, Nillable, Sort, Update

### Description

The largest single gift that the donor directly contributed. Data Processing Engine calculates this value by finding the amount of the donor's largest paid gift transaction. You can schedule this calculation to run on a regular basis.

HighestGiftYearAmount

### Type

currency

### **Properties**

Create, Filter, Nillable, Sort, Update

### Description

The amount the donor gave in the year they directly contributed the largest value. Data Processing Engine calculates this value by finding the total amount of all paid gift transactions in the year when the donor gave the largest amount. You can schedule this calculation to run on a regular basis.

HighestSoftCreditAmount

### Type

currency

### **Properties**

Create, Filter, Nillable, Sort, Update

#### Description

The value of the largest single gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the largest gift transaction for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.

HighestSoftCreditDate

### Type

date

### **Properties**

Create, Filter, Group, Nillable, Sort, Update

### Description

The date of the largest single gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the date of the largest gift transaction for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.

LastGiftAmount

#### Type

currency

### **Properties**

Create, Filter, Nillable, Sort, Update

Field	Details
	<b>Description</b> The value of the donor's most recent directly contributed gift. Data Processing Engine calculates this value by finding the amount of the donor's most recent paid gift transaction. You can schedule this calculation to run on a regular basis.
LastGiftDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date of the donor's most recent directly contributed gift. Data Processing Engine calculates this value by finding the date of the donor's most recent paid gift transaction. You can schedule this calculation to run on a regular basis.
LastRecurringPaymentDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description  The date when the donor last made a payment toward a recurring gift. Data Processing Engine calculates this value by finding the date of the donor's most recent paid gift transaction related to a recurring gift commitment. You can schedule this calculation to run on a regular basis.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastSoftCreditAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of the most recent gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the amount of the most recent paid gift transaction for which the donor received soft credit. You can schedule this calculation to run on a regular basis.

Field	Details
LastSoftCreditDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date of the most recent gift the donor influenced but didn't directly contribute. Data Processing Engine calculates this value by finding the date of the most recent paid gift transaction for which the donor received soft credit. You can schedule this calculation to run on a regular basis.
LastTwoYearGiftCount	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The total number of gifts the donor directly contributed two calendar years ago. Data Processing Engine calculates this value by counting the donor's paid gift transactions with a transaction date from two calendar years ago. You can schedule this calculation to run on a regular basis.
LastTwoYearSoftCreditCount	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The total number of gift soft credit records attributed to the donor two years ago.
	Available in API version 63.0 and later.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
LastYearGiftCount	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description  The total number of gifts that the donor directly contributed last calendar year. Data Processing Engine calculates this value by counting the number of the donor's paid gift transactions with a transaction date in the last calendar year. You can schedule this calculation to run on a regular basis.
LastYearSoftCreditCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The total number of gift soft credits attributed to the donor last year.
	Available in API version 63.0 and later.
LastYearSoftCreditsAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total value of soft credits earned by the donor last year.
	Available in API version 63.0 and later.
LowestGiftAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The smallest single gift the donor directly contributed. Data Processing Engine calculates this value by finding the amount of the smallest paid gift transaction of all of the donor's paid gift transactions. You can schedule this calculation to run on a regular basis.
MonetaryScore	Tuna
-	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The score that represents the monetary value of the donor's gifts. Data Processing Engine calculates this value according to how you configure RFM Scoring. You can schedule this calculation to run on a regular basis.

Available in API version 61.0 and later.

Field	Details
Name	Туре
	string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The auto-numbered name that uniquely identifies the donor gift summary.
RecencyScore	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The score that represents the giving recency of a donor. Data Processing Engine calculates this value according to how you configure RFM Scoring. You can schedule this calculation to run on a regular basis.
	Available in API version 61.0 and later.
SecondGiftDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The date of the second gift the donor directly contributed. Data Processing Engine calculates this value by finding the date of the donor's second paid gift transaction. You can schedule this calculation to run on a regular basis.
SoftCreditCount	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of gifts the donor influenced and didn't directly contribute. Data Processing Engine calculates this value by counting paid gift transactions for which the donor receives soft credit. You can schedule this calculation to run on a regular basis.
TotalBookableRevenue	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update

Field	Details
-------	---------

### Description

Data Processing Engine calculates this value by subtracting any transactions associated with booked pledges from the value of all transactions and booked pledges. You can schedule this calculation to run on a regular basis.

Available in API version 62.0 and later.

#### TotalGiftsAmount

### Type

currency

### **Properties**

Create, Filter, Nillable, Sort, Update

### Description

The value of all gifts the donor directly contributed. Data Processing Engine calculates this value by adding the amounts of the donor's paid gift transactions. You can schedule this calculation to run on a regular basis.

#### TotalHardSoftCredits

### Type

int

### **Properties**

Create, Filter, Group, Nillable, Sort, Update

### Description

The number of gifts the donor directly contributed and influenced. Data Processing Engine calculates this value by counting the donor's paid transactions and paid transactions for which the donor receives soft credit.. You can schedule this calculation to run on a regular basis.

### TotalHardSoftCreditsAmount

### Type

currency

### **Properties**

Create, Filter, Nillable, Sort, Update

### Description

The value of all gifts the donor directly contributed and influenced. Data Processing Engine calculates this value by adding the amounts of the donor's paid transactions and paid transactions for which the donor receives soft credit.. You can schedule this calculation to run on a regular basis.

### TotalPaidRcrInstallments

### Type

int

### **Properties**

Create, Filter, Group, Nillable, Sort, Update

### Description

The number of recurring installments that the donor directly contributed. Data Processing Engine calculates this value by counting the donor's paid gift transactions associated with recurring gift commitments. You can schedule this calculation to run on a regular basis.

Fundraising GiftBatch

Field	Details
TotalPaidRcrInstlAmt	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of all of the recurring installments that the donor directly contributed. Data Processing Engine calculates this value by adding the amounts of the donor's paid gift transactions associated with recurring gift commitments. You can schedule this calculation to run on a regular basis.
TotalSoftCreditsAmount	Type
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total value of all soft credits the donor has earned.
	Available in API version 63.0 and later.

### GiftBatch

Represents the details and status of the batch of gifts. This object is available in API version 59.0 and later.

### **Supported Calls**

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

### **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

### **Fields**

Field	Details
Description	Туре
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The description of the gift batch.

Fundraising GiftBatch

<b>Type</b> boolean
<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
<b>Description</b> Indicates whether the total and estimated amount of gifts or total and estimated count of gifts in the gift batch match (true) or not (false).
The default value is false.
Type int
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
The expected number of gifts in the gift batch.
Туре
double
Properties Create, Filter, Nillable, Sort, Update
<b>Description</b> When a single currency is accepted, this field shows the expected total value in the default currency of the gifts in the gift batch. When multiple currencies are accepted, this field is currency agnostic and is used to validate Estimated and Actual Batch values.
Type int
Properties Filter, Group, Nillable, Sort
<b>Description</b> The number of gifts that failed to process.
Type dateTime
<b>Properties</b> Create, Filter, Nillable, Sort, Update
<b>Description</b> The last date and time when the gift batch was processed.
Туре

Fundraising GiftBatch

Field	Details
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	<b>Type</b> string
	Properties  Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The autogenerated name of the gift batch.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object. ID of the creator of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ProcessedGiftCount	<b>Type</b> int
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The number of gifts that have been processed.

Fundraising GiftBatch

Field	Details
ScreenTemplateName	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description  Consider the name of the screen template that's used for the gift hatch
	Specifies the name of the screen template that's used for the gift batch.  Possible values are:
	• Default
	The default value is Default.
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the status of the gift batch.
	Possible values are:
	• Failed
	• In Progress
	• Partially Processed
	• Processed
	• Unprocessed
	The default value is Unprocessed.
StatusReason	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The reason for a gift batch status.
TotalBatchAmount	Туре
	double
	<b>Properties</b> Filter, Nillable, Sort
	Description
	When a single currency is accepted, this field shows the total value in the default currency of the gifts in the gift batch. When multiple currencies are accepted, this field is currency agnostic and is used to validate Estimated and Actual Batch values.

Field	Details
TotalGiftCount	Туре
	int
	Properties
	Filter, Group, Nillable, Sort
	Description
	The total number of gifts in the gift batch.

## **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.

#### **GiftBatchFeed**

Feed tracking is available for the object.

#### **GiftBatchHistory**

History is available for tracked fields of the object.

#### **GiftBatchShare**

Sharing is available for the object.

### **GiftCommitment**

Represents the commitment made by a donor. This object is available in API version 59.0 and later.

# **Supported Calls**

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

### **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

### **Fields**

Field	Details
CampaignId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description The campaign associated with this commitment. This field is a relationship field.

Field	Details
	Relationship Name
	Campaign
	Relationship Type Lookup
	Refers To Campaign
CurrentGiftCmtScheduleId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The current, active schedule of the commitment.
	This field is a relationship field.
	Relationship Name CurrentGiftCmtSchedule
	Relationship Type Lookup
	Refers To GiftCommitmentSchedule
Description	Type textarea
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The description about the gift commitment.
DonorId	Type reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	Description
	The person, household, or organization account associated with this commitment.
	This field is a relationship field.
	Relationship Name Donor
	Relationship Type Lookup
	Refers To
	Account

Field	Details
EffectiveStartDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date from when the commitment is in effect.
EffectiveTransactionInterval	Type int
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The transaction interval that's applicable based on the currently active schedule.
EffectiveTransactionPeriod	<b>Type</b> string
	Properties Filter, Group, Nillable, Sort
	<b>Description</b> The transaction period that's applicable based on the currently active schedule.
ExpectedAssetMaturityDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The expected maturity date of all the committed assets for a commitment.
ExpectedAssetTransferDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The expected date of transferring all the committed assets for a commitment.
ExpectedEndDate	Type date
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the total amount of the commitment is expected to be fully paid.

Field	Details
ExpectedTotalCmtAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total donation amount that's expected for this commitment.
FormalCommitmentType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the formality type of the commitment.
	Possible values are:
	• Verbal
	• Written
	The default value is Verbal.
FulfillmentType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies whether the commitment fulfillment depends on one or more conditions or is
	unconditional.
	Possible values are:
	• Conditional
	• Unconditional
	The default value is Unconditional.
GiftVehicle	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the vehicle that's used to fulfill a gift commitment.
	Possible values are:
	• Bequest
	Charitable Gift Annuity
	Donor Advised Fund

Field	Details
	Life Insurance
	• Other
	• Pooled Income Fund
	• Trust
GiftVehicleType	<b>Type</b> picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the type of gift vehicle that fulfills the gift commitment.
	Possible values are:
	Charitable Lead Trust
	Charitable Remainder Trust
	Deferred Gift Annuity
	• Flexible Gift Annuity
	<ul> <li>Immediate Gift Annuity</li> </ul>
	• Other
IsAssetTransferExpected	Type boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the donor intends to transfer non-monetary assets or not.
	The default value is false.
LastPaidTransactionDate	Туре
	date
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The date of the last paid transaction for the commitment.
	The date of the last paid dansaction for the communicity.
LastReferencedDate	Туре
	dateTime
	<b>Properties</b> Filter, Nillable, Sort
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Field	Details
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string
	Properties Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the gift commitment.
NextTransactionAmount	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The expected amount of the next gift transaction in the commitment schedule. This is calculated automatically based on the currently active schedule.
NextTransactionDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date of the next gift transaction in the commitment schedule. This is calculated automatically based on the currently active schedule.
OpportunityId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The opportunity associated with this commitment.
	This field is a relationship field.

Field	Details
	Relationship Name Opportunity
	Relationship Type Lookup
	Refers To Opportunity
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
RecurrenceType	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of recurrence of a commitment.
	Possible values are:
	• Fixed Length
	Open Ended
	The default value is Open Ended.
ScheduleType	Туре
	picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the schedule and type of the commitment.
	Possible values are:
	• Custom

Field	Details
	• Recurring
	The default value is Recurring.
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the status of the commitment.
	Possible values are:
	• Active
	• Closed
	• Draft
	• Failing
	• Lapsed
	• Paused
	The default value is Draft.
TotCommitmentScheduleAmt	Туре
	currency
	Properties Filter, Nillable, Sort
	Description
	The total expected donation amount that's calculated across all schedules in this commitment.
	This field is a calculated field.
TotExpcAssetMaturityVal	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The expected maturity value of all the committed assets for a commitment.
TotExpcAssetTransferVal	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total expected value of all the committed assets when they're transferred for a commitment.

Field	Details
TotalAssetPresentValue	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total current value of all the committed assets for a commitment.
TotalCurrentMonth	<b>Type</b> currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total value of all gift commitments made for the current month. This field is available from API version 62.0 and later.
TotalCurrentQuarter	<b>Type</b> currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total value of all gift commitments made for the current quarter. This field is available from API version 62.0 and later.
TotalCurrentYear	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	Description
	The total value of all gift commitments made for the current year. This field is available from API version 62.0 and later.
TotalNextYear	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total value of all gift commitments made for the next year. This field is available from API version 62.0 and later.
TotalPaidTransactionAmount	Туре
	currency

Field	Details
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The total amount of paid gift transactions for the commitment.
TransactionPaymentCount	Type int
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The number of paid gift transactions for the commitment.
WrittenOffAmount	Type currency
	Properties Filter, Nillable, Sort
	<b>Description</b> The total amount of written-off gift transactions for this commitment.

## **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.

### **GiftCommitmentChangeEvent (API Version 62.0)**

Change events are available for the object.

### GiftCommitmentFeed

Feed tracking is available for the object.

### GiftCommitmentHistory

History is available for tracked fields of the object.

### GiftCommitmentShare

Sharing is available for the object.

# GiftCmtChangeAttrLog

Represents the history of changes to a Gift Commitment over time with attribution to the source campaign or source code attributed to that change. This object is available in API version 60.0 and later.

(1) 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 Calls**

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

# Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

### **Fields**

Field	Details
CampaignId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The campaign associated with this commitment.
	This field is a relationship field.
	Relationship Name Campaign
	Relationship Type Lookup
	Refers To Campaign
ChangePerDayAmount	<b>Type</b> currency
	Properties Create, Filter, Sort, Update
	<b>Description</b> The change in amount of the commitment converted to amount per day.
ChangeStatus	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The status of the change to the commitment.
	Possible values are:
	• Downgrade
	• Neutral

Field	Details
	• Pause
	• Resume
	• Upgrade
	The default value is Upgrade.
ChangeType	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of change to the commitment. It's value is populated based on the current schedule and the schedule before it.
	Possible values are:
	<ul> <li>Amount- When the amount changes, comparing the actual amount on the schedule.</li> </ul>
	<ul> <li>Frequency- When the Transaction Interval or Transaction Period changes.</li> </ul>
	<ul> <li>Frequency and Amount-When both the interval and the amount changes.</li> <li>Applies when the first commitment is scheduled, the current schedule is paused or when a paused schedule is resumed.</li> </ul>
	The default value is Frequency.
EffectiveDate	<b>Type</b> date
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The effective date for the commitment change.
GiftCommitmentId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The commitment associated with this gift commitment schedule.
	This field is a relationship field.
	Relationship Name GiftCommitment
	Relationship Type  Master-Detail
	Refers To
	GiftCommitment

Field	Details
GiftCommitmentScheduleId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift commitment schedule associated with the gift transaction.
	This field is a relationship field.
	Relationship Name GiftCommitmentSchedule
	Relationship Type Lookup
	Refers To GiftCommitmentSchedule
LastReferencedDate	Type dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	<b>Type</b> string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the gift commitment schedule.
OutreachSourceCodeId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The outreach source code associated with this gift commitment attribution change log.
	This field is a relationship field.
	Relationship Name OutreachSourceCode
	Relationship Type Lookup
	Refers To OutreachSourceCode

### **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.

### ${\bf GiftCmtChangeAttrLogFeed}$

Feed tracking is available for the object.

### GiftCmtChangeAttrLogHistory

History is available for tracked fields of the object.

### **GiftCommitmentSchedule**

Represents the schedule for fulfilling the commitment. This object is available in API version 59.0 and later.

(1) 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 Calls**

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

# **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

### **Fields**

Field	Details
CampaignId	<b>Type</b> reference

Field	Details
	Properties  Croate Filter Croup Nillable Sort Hadate
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The campaign associated with this gift commitment schedule. All gift transactions associated with this gift commitment schedule are associated with this campaign.
	This field is a relationship field.
	Relationship Name Campaign
	Relationship Type Lookup
	Refers To Campaign
CampaignName	Туре
	string
	Properties Filter, Group, Nillable, Sort
	<b>Description</b> The name of the campaign associated with the gift commitment schedule.
CommitmentUpdateReason	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The reason the gift commitment schedule changed.
	Possible values are:
	Payment Method Declined
	• Financial Hardship
EndDate	<b>Type</b> date
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The end date of the new schedule for this gift commitment.
GiftCommitmentId	Type reference
	<b>Properties</b> Create, Filter, Group, Sort

Field	Details
	<b>Description</b> The commitment associated with this gift commitment schedule. A value is always required in this field to save the record.
	This field is a relationship field.
	Relationship Name GiftCommitment
	Relationship Type  Master-Detail
	Refers To GiftCommitment
GiftCommitmentName	<b>Type</b> string
	Properties Filter, Group, Nillable, Sort
	<b>Description</b> The name of the related gift commitment.
GiftCommitmentSchdBefEditId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The schedule that's associated with the current gift commitment schedule before it was edited
	This field is a relationship field.
	Relationship Name GiftCommitmentSchdBefEdit
	Relationship Type Lookup
	Refers To GiftCommitmentSchedule
GiftCommitmentStatus	<b>Type</b> picklist
	<b>Properties</b> Defaulted on create, Filter, Group, Nillable, Sort
	<b>Description</b> The status of the gift commitment that's fulfilled by the schedule.
	Possible values are:
	• Active

Field	Details
	• Closed
	• Draft
	• Failing
	• Lapsed
	• Paused
	The default value is Draft.
LastReferencedDate	Туре
	dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Туре
	dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the gift commitment schedule.
OutreachSourceCodeId	<b>Type</b> lookup
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The outreach source code associated with the gift transaction.
	This field is a relationship field. This field is available from API version 60.0 and later.
	Relationship Name OutreachSourceCode
	Relationship Type
	Lookup

Field	Details
	Refers To OutreachSourceCode
PaymentInstrumentId	<b>Type</b> lookup
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The Payment Instrument used to complete the transaction. This field is available from API version 60.0 and later.
	This field is a relationship field.
	Relationship Name PaymentInstrument
	Relationship Type Lookup
	Refers To PaymentInstrument
PaymentMethod	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Sort, Update
	Description  The payment method for the transactions associated with this gift commitment schedule.  All transactions associated with the commitment schedule default to this gift payment method.
	Possible values are:
	• ACH
	• Asset
	• Cash
	• Check
	• Credit Card
	• Cryptocurrency
	• In-Kind
	• PayPal
	• Stock
	• Unknown
	• Venmo

Field	Details
ProcessorReference	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The reference of the payment processor associated with the payment instrument. This field is available from API version 60.0 and later.
StartDate	Туре
	date
	Properties
	Create, Filter, Group, Sort, Update
	<b>Description</b>
	The start date of the new schedule for this gift commitment. A value is always required in this field to save the record.
TotalScheduleAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	Description
	The expected total amount of all gift transactions associated with the gift commitment schedule.
TransactionAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Sort, Update
	Description
	The gift amount of each transaction associated with the gift commitment schedule. A value is always required in this field to save the record.
TransactionDay	Туре
	picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The day of the month to create gift transaction in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction will be created on the last day for months that don't have that many days.
	Possible values are the numbers 1 through 30 or the value LastDay.
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Field	Details
	Always required when the Transaction Period is Monthly.
TransactionInterval	<b>Type</b> int
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The interval of running the gift commitment schedule. The transaction period and interval define how the schedule is run. For example, if the transaction period is monthly and the transaction interval is 3, the schedule is run after every three months.
TransactionPeriod	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The period for which the gift commitment schedule is run. The transaction period and frequency define how the schedule is run. For example, if the transaction period is monthly and the transaction frequency is 3, the schedule is run after every three months. A value is always required in this field to save the record.
	Possible values are:
	• Custom
	• Daily
	<ul><li>Monthly</li></ul>
	• Weekly
	• Yearly
	The default value is Monthly.
Туре	<b>Type</b> picklist
	Properties
	Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of gift commitment schedule. A value is always required in this field to save the record.
	Possible values are:
	Create Transactions
	Pause Transactions
	The default value is Create Transactions.

Fundraising GiftDefaultDesignation

### **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.

### GiftCommitmentScheduleChangeEvent (API Version 62.0)

Change events are available for the object.

#### GiftCommitmentScheduleFeed

Feed tracking is available for the object.

### GiftCommitmentScheduleHistory

History is available for tracked fields of the object.

# GiftDefaultDesignation

Represents the default designation for gifts that originate from an opportunity, campaign, or commitment. This object is available in API version 59.0 and later.

### **Supported Calls**

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

### **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

### **Fields**

Field	Details
AllocatedPercentage	<b>Type</b> percent
	<b>Properties</b> Create, Filter, Sort, Update
	<b>Description</b> The percentage of the gift that's allocated to this designation.
GiftDesignationId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The gift designation associated with this gift default designation.
	A value is always required in this field to save the record.
	This field is a relationship field.

Fundraising GiftDefaultDesignation

Field	Details
	Relationship Name
	GiftDesignation
	Relationship Type Lookup
	Refers To GiftDesignation
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The auto-numbered name that uniquely identifies this gift default designation.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object. ID of the creator of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup

Fundraising GiftDefaultSoftCredit

Field	Details
	Refers To
	Group, User
ParentRecordId	Туре
	reference
	Properties
	Create, Filter, Group, True, Sort, Update
	Description
	The parent record of this gift default designation.
	A value is always required in this field to save the record.
	This field is a polymorphic relationship field.
	Relationship Name ParentRecord
	Relationship Type Lookup
	Refers To
	Campaign, GiftCommitment, Opportunity

### **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.

#### GiftDefaultDesignationFeed

Feed tracking is available for the object.

#### GiftDefaultDesignationHistory

History is available for tracked fields of the object.

### ${\bf Gift Default Designation Share}$

Sharing is available for the object.

### GiftDefaultSoftCredit

Represents the default allocation for soft credits on gift commitment transactions that are created by a recurrence engine and credited to constituents who influenced the commitment. This object is available in API version 62.0 and later.

## **Supported Calls**

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

## **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fundraising GiftDefaultSoftCredit

# Fields

Field	Details
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The unique, auto-numbered name of the gift default soft credit.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	<b>Refers To</b> Group, User
ParentRecordId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update

Fundraising GiftDefaultSoftCredit

Field	Details
	Description
	The parent opportunity, or gift commitment record that's related to this default soft credit.
	This field is a polymorphic relationship field.
	Relationship Name ParentRecord
	Refers To GiftCommitment, Opportunity
PartialAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount of the gift transaction that's allocated as a soft credit to the specified recipient.
PartialPercent	Туре
	percent
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The percentage of the gift transaction that's allocated as a soft credit to the specified recipient.
RecipientId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The person or organization account that's associated with the soft credit.
	This field is a relationship field.
	Relationship Name Recipient
	Refers To Account
Role	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The soft credit role of the account or contact.
	Possible values are:

Field	Details
	• Honoree
	Household Member
	• Influencer
	Matched Donor
	• Other
	• Soft Credit
	• Solicitor
	Third Party Donor
	The default value is Soft Credit.

### **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.

### GiftDefaultSoftCreditHistory

History is available for tracked fields of the object.

### GiftDefaultSoftCreditOwnerSharingRule

Sharing rules are available for the object.

#### **GiftDefaultSoftCreditShare**

Sharing is available for the object.

# GiftDesignation

Represents a designation that can be assigned to a gift transaction. This object is available in API version 59.0 and later.

# Supported Calls

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

## **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

### **Fields**

Field	Details
AverageTransactionAmount	<b>Type</b> currency

Field Details

### **Properties**

Create, Filter, Nillable, Sort, Update

### Description

The average value of all paid gift transactions related to the related gift designation. Data Processing Engine calculates this value by dividing the gift designation's total transaction amount by its total transaction count. You can schedule this calculation to run on a regular basis.

CurrentYearTransactionCount

#### Type

int

#### **Properties**

Create, Filter, Group, Nillable, Sort, Update

### Description

The count of the current year's paid transactions related to the related gift designation. Data Processing Engine calculates this value by counting the gift designation's paid gift transactions with a transaction date in this calendar year. You can schedule this calculation to run on a regular basis.

CurrentYearTrxnAmount

#### Type

currency

### **Properties**

Create, Filter, Nillable, Sort, Update

#### Description

The value of the current year's paid transactions related to the related gift designation. Data Processing Engine calculates this value by adding the amounts of the gift designation's paid gift transactions with a transaction date this calendar year. You can schedule this calculation to run on a regular basis.

Description

### Type

textarea

### **Properties**

Create, Filter, Group, Nillable, Sort, Update

#### Description

The description of the gift designation.

FirstPaidTransactionDate

### Type

date

### **Properties**

Create, Filter, Group, Nillable, Sort, Update

### Description

The date of the first paid gift transaction related to the related gift designation. Data Processing Engine calculates this value by finding the date of the first paid gift transaction related to the gift designation. You can schedule this calculation to run on a regular basis.

Field	Details
HighestTransactionAmount	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The highest transaction value associated with the related gift designation. Data Processing Engine calculates this value by finding the amount of the largest paid gift transaction related to the gift designation. You can schedule this calculation to run on a regular basis.
IsActive	Type boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates if the gift designation is active (true) or not (false).
	The default value is true.
IsDefault	Type boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates whether the unrestricted gift amount is to be allocated to this designation as default (true) or not (false). There can only be a single designation with this set to true at a time.
	The default value is false.
LastPaidTransactionDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date of the most recent paid gift transaction related to the related gift designation. Data Processing Engine calculates this value by finding the date of the most recent related paid gift transaction related to the gift designation. You can schedule this calculation to run on a regular basis.
LastReferencedDate	Type dateTime
	<b>Properties</b> Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastTwoYearTrxnAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of the gift transactions completed two calendar years ago related to the related gift designation. Data Processing Engine calculates this value by adding the amounts of all paid gift transactions related to the gift designation with a transaction date from two calendar years ago. You can schedule this calculation to run on a regular basis.
LastTwoYearTrxnCount	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description  The count of gift transactions made two calendar years ago that are related to the related gift designation. Data Processing Engine calculates this value by counting all paid gift transactions related to the gift designation with a transaction date from two calendar years ago. You can schedule this calculation to run on a regular basis.
LastViewedDate	Туре
	dateTime  Properties  Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
LastYearTransactionCount	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The count of gift transactions related to the related gift designation and made last calendar year. Data Processing Engine calculates this value by counting all paid gift transactions related to the gift designation with a transaction date in the last calendar year. You can schedule this calculation to run on a regular basis.

this calculation to run on a regular basis.

Field	Details
LastYearTrxnAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of gift transactions related to the related gift designation and completed last calendar year. Data Processing Engine calculates this value by adding the amounts of all paid gift transactions related to the gift designation with a transaction date from the last calendar year. You can schedule this calculation to run on a regular basis.
LowestTransactionAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The value of the smallest paid transaction related to the related gift transaction. Data Processing Engine calculates this value by finding the smallest paid gift transaction amount related to the related gift designation. You can schedule this calculation to run on a regular basis.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the gift designation.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User

Fundraising Giffentry

Field	Details
TotalTransactionAmount	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total value of all gift transactions related to the related gift designation. Data Processing Engine calculates this value by adding the total amounts of all paid gift transactions related to the gift designation. You can schedule this calculation to run on a regular basis.
TotalTransactionCount	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The count of all paid transactions related to the related gift designation. Data Processing Engine calculates this value counting the paid gift transactions related to the gift designation. You can schedule this calculation to run on a regular basis.

# **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.

#### GiftDesignationFeed

Feed tracking is available for the object.

### GiftDesignationHistory

History is available for tracked fields of the object.

### GiftDesignationShare

Sharing is available for the object.

# **GiftEntry**

Represents gifts created individually or in a batch before they're processed and logged in their target records. After processing, these records serve as an audit trail for gift transactions. This object is available in API version 59.0 and later.

## **Supported Calls**

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

### **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fundraising GiftEntry

# Fields

Field	Details
CampaignId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The campaign that's associated with the gift entry.
	This field is a relationship field.
	Relationship Name Campaign
	Relationship Type Lookup
	Refers To
	Campaign
CheckDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date on the check that is used as the payment method for the gift.
City	Type
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The city where the donor resides.
Country	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The country where the donor resides.
CurrencyIsoCode	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Fundraising GiftEntry

Field	Details
	Description
	Identifies the currency used for the gift transaction.
	Valid value is:
	• USD—U.S. Dollar
	The default value is USD. Available in API version 61.0 and later.
DonorCoverAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	Description
	The fee amount that a donor pays in addition to the gift amount.
DonorId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The person, household, or organization account associated with the gift.
	This field is a relationship field.
	Relationship Name  Donor
	Relationship Type Lookup
	Refers To Account
EffectiveStartDate	Type
	date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date from when the commitment is in effect. Available in API version 61.0 and later.
Email	<b>Type</b> email
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The email of the donor.

Field	Details
ExpectedEndDate	Туре
	date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the total amount of the commitment is expected to be paid. Available in API version 61.0 and later.
ExpiryMonth	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The month of the credit card expiration date. This field is available from API version 60.0 and later.
ExpiryYear	Туре
	string
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The year of the credit card expiration date. This field is available from API version 60.0 and later.
FirstName	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The first name of the donor.
GiftAmount	Туре
	currency
	Properties
	Create, Filter, Sort, Update
	<b>Description</b> The amount of the gift.
GiftBatchId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b>
	The parent gift batch that's associated with the gift entry.
	This field is a relationship field.
	Relationship Name GiftBatch
	Relationship Type Lookup
	<b>Refers To</b> GiftBatch
GiftCommitmentId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift commitment that's associated with the gift entry.
	This field is a relationship field.
	Relationship Name GiftCommitment
	Relationship Type Lookup
	Refers To GiftCommitment
GiftDesignation1Amount	Type currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount to be allocated to designation 1.
GiftDesignation1Id	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the designation 1 to which the gift amount is to be allocated.
	This field is a relationship field.
	Relationship Name GiftDesignation1

Field	Details
	Relationship Type Lookup
	<b>Refers To</b> GiftDesignation
GiftDesignation1Percent	Type percent
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The percentage of gift amount to be allocated to designation 1 if the direct amount isn't being allocated.
GiftDesignation2Amount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount to be allocated to designation 2.
GiftDesignation2Id	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the designation 2 to which the gift amount is to be allocated.
	This field is a relationship field.
	Relationship Name GiftDesignation2
	Relationship Type Lookup
	<b>Refers To</b> GiftDesignation
GiftDesignation2Percent	Type percent
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The percentage of gift amount to be allocated to designation 2 if the direct amount isn't being allocated.

Field	Details
GiftDesignation3Amount	Туре
	currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount to be allocated to designation 3.
GiftDesignation3Id	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the designation 3 to which the gift amount is to be allocated.
	This field is a relationship field.
	Relationship Name GiftDesignation3
	Relationship Type Lookup
	Refers To GiftDesignation
GiftDesignation3Percent	<b>Type</b> percent
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The percentage of gift amount to be allocated to designation 3 if the direct amount isn't being allocated.
GiftProcessingResult	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The processing result of the gift entry record.
GiftProcessingStatus	Type
	picklist
	Properties  Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description
	Specifies the processing status of the gift entry.
	Possible values are:
	• Failure
	• New
	• Success
	The default value is New.
GiftReceivedDate	Туре
	date
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The date when the gift is received.
GiftTransactionId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift transaction that's associated with the gift entry.
	This field is a relationship field.
	Relationship Name GiftTransaction
	Relationship Type Lookup
	Refers To GiftTransaction
GiftType	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of gift that's associated with the gift entry.
	Possible values are:
	• Individual
	• Organizational
	The default value is Individual.

Field	Details
HomePhone	Type
	phone
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The home phone number of the donor.
IsNewRecurringGift	<b>Type</b> boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the gift is a new recurring gift commitment (true) or not (false).
	The default value is false. Available in API version 61.0 and later.
IsSetAsDefault	<b>Type</b> boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the values in the gift entry are used as default values in other gift entries of the gift batch or not.
	The default value is false.
Last4	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The last 4 digits of the credit card or bank account. This field is available from API version 60.0 and later.
LastName	<b>Type</b> string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The last name of the donor.
LastProcessedDateTime	Туре
LastProcessedDateTime	<b>Type</b> dateTime

Field	Details
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the gift entry was last processed.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
MobilePhone	<b>Type</b> phone
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The mobile number of the donor.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the gift entry record.
OrganizationName	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the donating organization that's associated with the gift entry.

Field	Details
OutreachSourceCodeId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The outreach source code that's associated with the campaign for the gift entry record.
	This field is a relationship field.
	Relationship Name OutreachSourceCode
	Relationship Type Lookup
	Refers To OutreachSourceCode
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object. ID of the creator of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
PaymentIdentifier	<b>Type</b> string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The identifier of the payment method for the gift, such as check number, transaction order number, merchant order number.
PaymentMethod	Type
	picklist  Properties  Create, Filter, Group, Sort, Update

Field	Details
	<b>Description</b> Specifies the payment method used for this gift.
	Possible values are:
	• ACH
	• Asset
	• Cash
	• Check
	• Credit Card
	• Cryptocurrency
	• In-Kind
	• PayPal
	• Stock
	• Unknown
	• Venmo
PostalCode	<b>Type</b> string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The postal code from the donor's address.
Salutation	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the honorific abbreviation, word, or phrase to be used in front of the donor's name in greetings, such as Dr. or Mrs.
	Possible values are:
	• Dr.
	• Mr.
	• Mrs.
	• Ms.
	• Mx.
	• Prof.
SoftCreditInformation	Туре
	textarea

Field	Details
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The information about the soft credit, such as the name of the soft creditor, role, and amount or percentage of soft credit allocated to the soft creditor.
State	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the state or province where the donor resides.
Street	Type string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The street details from the donor's address.
TotalTransactionFeeAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total transaction fees charged by the payment processor for the gift. For example, application fees, processing fees.
TransactionDay	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the day of the month to create gift transaction in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction will be created on the last day for months that don't have that many days.
	Valid values are: numerals 1–30 and LastDay (of the month)
	The default value is 1. Available in API version 61.0 and later.
TransactionInterval	Type int

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The interval of running the gift commitment schedule. The transaction period and interval define how the schedule is run. For example, if the transaction period is monthly and transaction interval is 3, the schedule is run after every three months. Available in API version 61.0 and later.
TransactionPeriod	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The period for which the gift commitment schedule is run. The transaction period and frequency define how the schedule is run. For example, if the transaction period is monthly and transaction frequency is 3, the schedule is run after every three months.
	Valid values are:
	• Custom
	• Daily
	• Monthly
	<ul><li>Weekly</li><li>Yearly</li></ul>
	The default value is Monthly. Available in API version 61.0 and later.

# GiftRefund

Represents a refund of a gift. This object is available in API version 59.0 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 Calls**

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

# **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

# Fields

Field	Details
Amount	Туре
	currency
	<b>Properties</b> Create, Filter, Sort, Update
	<b>Description</b> The amount of the refund.
Date	Туре
	date
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The date the transaction was refunded.
GatewayTransactionFee	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The transaction fee charged by the payment gateway. This field is available from API version 60.0 and later.
GiftTransactionId	Type reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The gift transaction associated with this refund.
	This field is a relationship field.
	Relationship Name GiftTransaction
	Relationship Type  Master-Detail
	<b>Refers To</b> GiftTransaction
LastGatewayErrorMessage	<b>Type</b> string

Field	Details
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The most recent error message that's received by the gateway. This field is available from API version 60.0 and later.
LastGatewayProcessedDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time of the last processing attempt by the gateway. This field is available from API version 60.0 and later.
LastGatewayResponseCode	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The most recent response code that's received by the gateway. This field is available from API version 60.0 and later.
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	<b>Description</b> The unique, auto-numbered name of the gift refund.
ProcessorTransactionFee	Type currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The transaction fee charged by the payment processor. This field is available from API version 60.0 and later.
Reason	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The reason for the refund.
	Possible values are:
	• Donor Request
	• Incorrect Amount
Status	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the refund.
	Possible values are:
	• Completed
	• Failed
	• Initiated

# **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.

#### **GiftRefundChangeEvent** (API Version 62.0)

Change events are available for the object.

#### GiftRefundFeed

Feed tracking is available for the object.

Fundraising GiftSoftCredit

#### GiftRefundHistory

History is available for tracked fields of the object.

### **GiftSoftCredit**

Represents the soft credit attributed to a person or organization for the gift transaction. This object is available in API version 59.0 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 Calls

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

### **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

#### **Fields**

Field	Details
GiftTransactionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The gift transaction associated with this soft credit.
	This field is a relationship field.
	Relationship Name GiftTransaction
	Relationship Type  Master-Detail
	Refers To GiftTransaction
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.

Fundraising GiftSoftCredit

Field	Details
LastViewedDate	Туре
	dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view
Name	<b>Type</b> string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The unique, auto-numbered name of the gift soft credit.
PartialAmount	<b>Type</b> currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount of the soft credit when it isn't the full transaction amount.
PartialPercent	<b>Type</b> percent
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The percentage of the full transaction amount for this soft credit when it isn't the full transaction amount.
	Note: Soft Credit percent values don't need to total to 100% when there are multiple soft credit records.
RecipientId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The person account that's associated with the soft credit.
	This field is a relationship field.
	Relationship Name Recipient

Fundraising GiftSoftCredit

Field	Details
	Relationship Type
	Lookup
	Refers To
	Account
Role	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The soft credit role of the account or contact.
	Possible values are:
	• Honoree
	Household Member
	• Influencer
	Matched Donor
	• Other
	• Soft Credit
	• Solicitor
	Third Party Donor
	The default value is Soft Credit.
SoftCreditAmount	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	The calculated amount of the soft credit.

# **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.

#### **GiftSoftCreditChangeEvent (API Version 62.0)**

Change events are available for the object.

#### GiftSoftCreditFeed

Feed tracking is available for the object.

#### GiftSoftCreditHistory

History is available for tracked fields of the object.

#### ${\bf GiftSoftCreditOwnerSharingRule}$

Sharing rules are available for the object.

### GiftTransaction

Represents a completed transaction from a gift. This object is available in API version 59.0 and later.

# **Supported Calls**

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

### **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

### **Fields**

Field	Details
AcknowledgementDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the gift transaction was acknowledged.
AcknowledgementStatus	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the status of the acknowledgement that's sent for the gift transaction.
	Possible values are:
	• Don't Send
	• Sent
	• To Be Sent
	The default value is To Be Sent.
CampaignId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	The campaign associated with the gift transaction.
	This field is a relationship field.
	<b>Relationship Name</b> Campaign
	Relationship Type Lookup
	<b>Refers To</b> Campaign
CheckDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date on the check.
CurrentAmount	<b>Type</b> currency
	Properties Filter, Nillable, Sort
	Description
	The gift transaction amount after refunds.
	This field is a calculated field.
CurrencyIsoCode	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Identifies the currency used for the gift transaction.
	Valid value is:
	• USD—U.S. Dollar
	The default value is USD. Available in API version 61.0 and later.
Description	<b>Type</b> textarea
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The description of the gift transaction.
CurrentAmount	Туре
	currency
	<b>Properties</b> Filter, Nillable, Sort
	Description
	This field is a calculated field.
Description	Туре
	textarea
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The description of the gift transaction.
	The description of the girl dansaction.
DonorCoverAmount	<b>Type</b> currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The amount the donor added to their gift to cover fees. Available in API version 61.0 and later.
DonorId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The person, household, or organization account associated with the gift transaction.
	This field is a relationship field.
	Relationship Name
	Donor
	Relationship Type Lookup
	Refers To Account
GatewayReference	Туре
	string

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Reference of the transaction that the gateway assigned. This field is available from API version 60.0 and later.
GatewayTransactionFee	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The transaction fee charged by the payment gateway. This field is available from API version 60.0 and later.
GiftCommitmentId	Type reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift commitment associated with the gift transaction.
	This field is a relationship field.
	Relationship Name GiftCommitment
	Relationship Type Lookup
	Refers To GiftCommitment
GiftCommitmentScheduleId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift commitment schedule associated with the gift transaction.
	This field is a relationship field.
	Relationship Name GiftCommitmentSchedule
	Relationship Type Lookup
	Refers To GiftCommitmentSchedule

Field	Details
GiftType	Туре
	picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of gift that's associated with the gift transaction.
	Possible values are:
	• Individual
	• Organizational
	The default value is Individual.
IsFullyRefunded	<b>Type</b> boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	Description
	Set to true when $\bf Status$ equals Fully Refunded. You can query and filter on this field, but you cannot directly set the value.
IsPaid	<b>Type</b> boolean
	Properties  Defaulted on create, Filter, Group, Sort
	Description
	Set to true when <b>Status</b> equals Paid and <b>Current Amount</b> equals 0. You can query and filter on this field, but you cannot directly set the value.
IsPartiallyRefunded	Туре
	boolean
	Properties  Defaulted on create, Filter, Group, Sort
	Description
	Set to true when <b>Status</b> equals Paid and <b>Current Amount</b> is greater than 0. You can query and filter on this field, but you cannot directly set the value.
IsWrittenOff	Туре
	boolean
	Properties  Defaulted on create, Filter, Group, Sort

Field	Details
	<b>Description</b> Set to true when <b>Status</b> equals <code>Written-Off</code> . You can query and filter on this field, but you cannot directly set the value.
LastGatewayErrorMessage	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The most recent error message that's received by the gateway. This field is available from API version 60.0 and later.
LastGatewayProcessedDate	Type dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time of the last processing attempt by the gateway. This field is available from API version 60.0 and later.
LastGatewayResponseCode	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The most recent response code that's received by the gateway. This field is available from API version 60.0 and later.
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
MatchingEmployerTransactionId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift transaction made by the employer that matches the gift transaction.
	This field is a relationship field.
	Relationship Name  MatchingEmployerTransaction
	Relationship Type Lookup
	<b>Refers To</b> GiftTransaction
Name	<b>Type</b> string
	Properties Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the gift transaction.
NonTaxDeductibleAmount	Type currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The portion of the gift transaction amount that can't be claimed as a tax deduction by the donor. Available in API version 61.0 and later.
OriginalAmount	Type currency
	Properties Create, Filter, Sort, Update
	Description
	The original amount of gift transaction that includes donor cover and excludes the transaction fees. A value is always required in this field to save the record.

Field	Details
OutreachSourceCodeId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The outreach source code associated with the gift transaction.
	This field is a relationship field.
	Relationship Name OutreachSourceCode
	<b>Relationship Type</b> Lookup
	Refers To OutreachSourceCode
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
PaymentIdentifier	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The reference number associated with the payment method for the gift, such as check number, transaction order number, merchant order number.
PaymentInstrumentId	<b>Type</b> lookup
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The Payment Instrument used to complete the transaction. This field is available from API version 60.0 and later.
	This field is a relationship field.
	Relationship Name PaymentInstrument
	Relationship Type Lookup
	Refers To PaymentInstrument
PaymentMethod	<b>Type</b> picklist
	Properties  Create, Filter, Group, Sort, Update
	<b>Description</b> Specifies the payment method used to complete the gift transaction. A value is always required in this field to save the record.
	Possible values are:
	• ACH
	• Asset
	• Cash
	• Check
	• Credit Card
	<ul> <li>Cryptocurrency</li> </ul>
	• In-Kind
	• PayPal
	• Stock
	• Unknown
	• Venmo
ProcessorReference	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The reference of the payment processor associated with the payment instrument. This field is a validable from API version 60.0 and later.

is available from API version 60.0 and later.

Field	Details
ProcessorTransactionFee	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The transaction fee charged by the payment processor. This field is available from API version 60.0 and later.
RefundedAmount	Туре
	currency
	Properties  Defaulted on create, Filter, Nillable, Sort
	Description
	The amount of the original gift transaction that was refunded.
	This field is a calculated field.
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Specifies the status of the gift transaction. A value is always required in this field to save the record.
	Possible values are:
	• Canceled
	• Failed
	• Fully Refunded
	• Paid
	• Pending
	• Unpaid
	• Written-Off
	The default value is Unpaid.
TaxReceiptStatus	Туре
	picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the status of the tax receipt for the gift transaction. This field is available from API version 62.0 and later.

Field	Details
	Possible values are:
	• Don't Send
	• Sent
	• To Be Sent
	The default value is To Be Sent.
TotalTransactionFee	Туре
	currency
	Properties
	Filter, Nillable, Sort
	Description
	The total amount of fees charged by the payment gateway and processor for this transaction. This field is available from API version 60.0 and later.
	This field is a calculated field.
TransactionDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the donor completed the gift transaction.
TransactionDueDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The expected date of the scheduled gift transaction.

### **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.

#### **GiftTransactionChangeEvent (API Version 62.0)**

Change events are available for the object.

#### ${\bf Gift Transaction Feed}$

Feed tracking is available for the object.

#### GiftTransactionHistory

History is available for tracked fields of the object.

#### **GiftTransactionOwnerSharingRule**

Sharing rules are available for the object.

#### GiftTransactionShare

Sharing is available for the object.

# GiftTransactionDesignation

Represents a junction between a gift transaction and a gift designation. This object is available in API version 59.0 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 Calls

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

### **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

#### **Fields**

Field	Details
Amount	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount of the transaction allocated to the designation.
GiftDesignationId	<b>Type</b> reference
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift designation associated with this transaction designation. A value is always required in this field to save the record.
	This field is a relationship field.
	Relationship Name GiftDesignation
	Relationship Type Lookup
	Refers To GiftDesignation

Field	Details
GiftTransactionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The transaction associated with this transaction designation. A value is always required in this field to save the record.
	This field is a relationship field.
	Relationship Name GiftTransaction
	Relationship Type  Master-Detail
	Refers To GiftTransaction
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
Name	<b>Type</b> string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The auto-numbered name that uniquely identifies this transaction designation.
OwnerId	<b>Type</b> reference

Field	Details
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type  Lookup
	<b>Refers To</b> Group, User
Percent	<b>Type</b> percent
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The percentage of the transaction amount allocated to the designation.

### **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.

#### GiftTransactionDesignationChangeEvent (API Version 62.0)

Change events are available for the object.

#### ${\bf Gift Transaction Designation Feed}$

Feed tracking is available for the object.

#### ${\bf Gift Transaction Designation History}$

History is available for tracked fields of the object.

#### ${\bf Gift Transaction Designation Share}$

Sharing is available for the object.

### **GiftTribute**

Represents the details and status of the gift tribute. This object is available in API version 59.0 and later.

### **Supported Calls**

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

# Special Access Rules

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

# **Fields**

Field	Details
GiftCommitmentId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift commitment associated with this tribute.
	This field is a relationship field.
	Relationship Name GiftCommitment
	Relationship Type Lookup
	Refers To GiftCommitment
GiftTransactionId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The gift transaction associated with this tribute.
	This field is a relationship field.
	Relationship Name GiftTransaction
	Relationship Type Lookup
	Refers To GiftTransaction
HonoreeContactId	<b>Type</b> reference
	Properties  Create, Filter, Group, Nillable, Sort, Update
	Description
	The contact (person account) associated with the tribute gift transaction.
	This field is a relationship field.

Field	Details
	Relationship Name HonoreeContact
	Relationship Type Lookup
	Refers To Account
HonoreeInformation	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The additional details of the tribute recipient.
HonoreeName	<b>Type</b> string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the person being honored by the tribute gift transaction.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
Name	<b>Type</b> string
	Properties  Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	<b>Description</b> The unique, auto-numbered name of the gift tribute.
NotificationChannel	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies how to notify the tribute notification contact should be notified.
	Possible values are:
	<ul><li>Email</li><li>Mail</li></ul>
NotificationContactId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The contact (person account) who should be notified of the tribute gift transaction.
	This field is a relationship field.
	Relationship Name NotificationContact
	Relationship Type Lookup
	Refers To Account
NotificationContactName	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the person who should be notified of the tribute gift transaction.
NotificationDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the recipient was notified about the tribute.

Field	Details
NotificationEmail	<b>Type</b> email
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The email that's used to notify a person about the tribute gift transaction.
NotificationInfo	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The information about the person who should be notified of the tribute gift transaction.
NotificationMessage	Type textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The notification message that's sent for the tribute gift transaction.
NotificationStatus	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the notification sent to the tribute recipient.
	Possible values are:  • Don't Send
	• Sent
	• To Be Sent
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	This field is a polymorphic relationship field.
	Relationship Name Owner

Fundraising OutreachSourceCode

Field	Details
	Relationship Type Lookup
	<b>Refers To</b> Group, User
TributeType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<ul><li>Description</li><li>Specifies the type of tribute when a gift is given on behalf of someone else.</li><li>Possible values are:</li><li>Honor</li></ul>
	• Memorial

### **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.

#### **GiftTributeFeed**

Feed tracking is available for the object.

#### **GiftTributeHistory**

History is available for tracked fields of the object.

#### **GiftTributeShare**

Sharing is available for the object.

## OutreachSourceCode

Represents information about a source code that's associated with an outreach campaign. This object is available in API version 59.0 and later.

### Supported Calls

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

# **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users

Field	Details
AudienceCount	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of person accounts, contacts, and businesses in this audience.
AudienceInformation	Туре
	textarea
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	Detailed information about the audience for the outreach source code. This field is available from API version 62.0 and later.
CampaignId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The parent campaign associated with this source code.
	This field is a relationship field.
	Relationship Name
	Campaign
	Relationship Type
	Lookup
	Refers To
	Campaign
CurrencyIsoCode	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Identifies the currency used for the gift transaction.
	Valid value is:
	• USD—U.S. Dollar
	The default value is USD. Available in API version 61.0 and later.

Field	Details
Description	Туре
	textarea
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The description of the source code.
FocusSegmentId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Lists individuals who are segmented for this source code.
	This field is available with a Data Cloud license.
	This field is a relationship field.
	Relationship Name  MarketSegment
	Relationship Type Lookup
	Refers To  MarketSegment
LastReferencedDate	Туре
	dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view.
MessageChannel	<b>Type</b> picklist

Field Details

## **Properties**

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

### Description

The channel used for the message from which the donation originated. This field is available from API version 60.0 and later.

Possible values are:

- Digital Paid
- Direct Mail
- Email
- Organic Web
- Physical
- SMS
- Share Partner
- Social Organic
- Social Paid
- Telemarketing

MessageChannelPlatform

# Type

string

## **Properties**

Create, Filter, Group, Nillable, Sort, Update

## Description

The outreach message channel platform from which the donation originated. This field is available from API version 60.0 and later.

MessageChannelPlatformAccount

# Type

string

#### **Properties**

Create, Filter, Group, Nillable, Sort, Update

## Description

The platform account used to send the outreach message. This field is available from API version 60.0 and later.

MessageContent

### Type

string

### **Properties**

Create, Filter, Group, Nillable, Sort, Update

### Description

The outreach message content. This field is available from API version 60.0 and later.

Field	Details	
MessageContentTitle	Туре	
	string	
	Properties	
	Create, Filter, Group, Nillable, Sort, Update	
	Description	
	The outreach message title. This field is available from API version 60.0 and later.	
Name	Туре	
	string	
	Properties	
	Create, Filter, Group, idLookup, Sort, Update	
	Description	
	The name of the source code.	
OwnerId	Туре	
	reference	
	Properties	
	Create, Defaulted on create, Filter, Group, Sort, Update	
	Description	
	ID of the owner of this object. ID of the creator of this object.	
	This field is a polymorphic relationship field.	
	Relationship Name	
	Owner	
	Relationship Type	
	Lookup	
	Refers To	
	Group, User	
SentDate	Туре	
	dateTime	
	Properties	
	Create, Filter, Nillable, Sort, Update	
	Description	
	The date and time that the outreach was sent. Available in API version 61.0 and later.	
SourceCode	Туре	
	string	
	Properties	
	Create, Filter, Group, idLookup, Sort, Update	
	Description	
	The unique source code. This field is unique within your organization.	

Field	Details
SourceCodeBaseUrl	Туре
	url
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The base URL for the outreach source code. This field is available from API version 60.0 and later.
SourceCodeUrl	Туре
	url
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The URL with UTM codes that's generated for the outreach source code. This field is available from API version 60.0 and later.
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The status of the source code.
	Possible values are:
	• Active
	• Archived
	• Inactive
	The default value is Active.
UsageType	Туре
	picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the usage of the outreach source code.
	Possible values are:
	• Fundraising
	The default value is Fundraising.

# **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.

## OutreachSourceCodeChangeEvent (API Version 62.0)

Change events are available for the object.

#### OutreachSourceCodeFeed

Feed tracking is available for the object.

## OutreachSourceCodeHistory

History is available for tracked fields of the object.

## OutreachSourceCodeOwnerSharingRule

Sharing rules are available for the object.

## OutreachSourceCodeShare

Sharing is available for the object.

# **OutreachSummary**

Represents a summary of results of the outreach campaign. This object is available in API version 59.0 and later.

# **Supported Calls**

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

# **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Field	Details
AverageGiftAmount	<b>Type</b> currency
	Properties Filter, Sort
	Description  The average amount of all gifts in response to the related outreach source code or campaign.  Data Processing Engine calculates this value by dividing the total gift transaction amount by the gift count. You can schedule this calculation to run on a regular basis.
AverageOnetimeGiftAmount	<b>Type</b> currency
	Properties Filter, Sort

<b>Details</b>

# Description

The average amount of all one-time, non-recurring gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by dividing the total one-time gift amount by the one-time donor count. You can schedule this calculation to run on a regular basis.

### AverageRecurringGiftAmount

### Type

currency

# **Properties**

Filter, Sort

### Description

The average amount of all recurring gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by dividing the total recurring gift amount by the recurring donor count. You can schedule this calculation to run on a regular basis.

## CampaignId

### Type

reference

# **Properties**

Create, Filter, Group, Nillable, Sort, Update

## Description

The campaign associated with this outreach gift summary. You can associate one campaign with an outreach summary.

This field is a relationship field.

### **Relationship Name**

Campaign

### **Relationship Type**

Lookup

## **Refers To**

Campaign

#### DonorCount

# Type

int

#### **Properties**

Create, Filter, Group, Nillable, Sort, Update

# Description

The number of unique donors in response to the related outreach source code or campaign. Data Processing Engine calculates this value by counting the unique donors with paid transactions. You can schedule this calculation to run on a regular basis.

#### GiftCount

## Type

int

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by counting the paid gift transactions related to the campaign or source code. You can schedule this calculation to run on a regular basis.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
Name	<b>Type</b> string
	Properties  Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The auto-numbered name that uniquely identifies the outreach summary.
OnetimeDonorCount	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description  The number of contacts who gave a one-time, non-recurring donation in response to the related outreach source code or campaign. Data Processing Engine calculates this value by counting the unique donors with related gift transactions that are paid and not associated with a gift commitment. You can schedule this calculation to run on a regular basis.
OutreachSourceCodeId	<b>Type</b> reference

Field	Details	
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update	
	<b>Description</b> The outreach source code associated with this outreach gift summary. You can associate one outreach source code with an outreach summary.	
	This field is a relationship field.	
	<b>Relationship Name</b> OutreachSourceCode	
	Relationship Type Lookup	
	<b>Refers To</b> OutreachSourceCode	
OwnerId	<b>Type</b> reference	
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update	
	<b>Description</b> ID of the owner of this object.	
	This field is a polymorphic relationship field.	
	Relationship Name Owner	
	Relationship Type Lookup	
	Refers To Group, User	
RecurringDonorCount	<b>Type</b> int	
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update	
	<b>Description</b> The number of contacts who gave a recurring donation in response to the related outreach source code or campaign. Data Processing Engine calculates this value by counting the unique donors for gift transactions that are paid and related to recurring gift commitments. You can schedule this calculation to run on a regular basis.	
ResponseRate	<b>Type</b> percent	
	Properties Create, Filter, Nillable, Sort, Update	

Field	Details

# Description

The percentage of responses received from donors to the related outreach source code or campaign. Data Processing Engine calculates this value by dividing the donor count by the audience count. You can schedule this calculation to run on a regular basis.

### TotalGiftTransactionAmount

#### Type

currency

#### **Properties**

Create, Filter, Nillable, Sort, Update

### Description

The total value of all paid gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by adding the amounts of all paid gift transactions. You can schedule this calculation to run on a regular basis.

#### TotalOnetimeGiftAmount

### Type

currency

## **Properties**

Create, Filter, Nillable, Sort, Update

## Description

The total value of all one-time gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by adding the total amounts of all related paid gift transactions that aren't related to a gift commitment. You can schedule this calculation to run on a regular basis.

#### TotalRecurringGiftAmount

### Type

currency

### **Properties**

Create, Filter, Nillable, Sort, Update

### Description

The total value of all recurring gifts in response to the related outreach source code or campaign. Data Processing Engine calculates this value by adding the total amounts of all paid gift transactions that are related to recurring gift commitments. You can schedule this calculation to run on a regular basis.

# **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.

#### OutreachSummaryFeed

Feed tracking is available for the object.

## OutreachSummaryHistory

History is available for tracked fields of the object.

# Outreach Summary Share

Sharing is available for the object.

# PaymentInstrument

Represents the details related to the Payment Instrument used to complete the transaction. This object is available in API version 60.0 and later.

# **Supported Calls**

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

# **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users

Field	Details
AccountHolderName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Name of the Payment Instrument Holder.
AccountId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The Account or PersonAccount that is using the payment instrument.
	This field is a relationship field.
	Relationship Name
	Account
	Relationship Type
	Lookup
	Refers To
	Account
BankAccountHolderType	Туре
	string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Determines if the bank account holder is an individual or a company.
BankAccountNumber	<b>Type</b> string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The bank account number used for payment.
BankAccountType	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Type of the Bank Account.
BankCode	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Code of bank associated with the bank account.
BankName	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Name of bank associated with the bank account.
CardBrand	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The credit card brand, network, or issuer.
CurrencyIsoCode	<b>Type</b> picklist

Field	Details
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The currency ISO code. This field is hidden when multicurrency is off.
	Possible values are:
	AUD—Australian Dollar
	GBP—British Pound
	• USD—U.S. Dollar
	The default value is USD.
DigitalWalletProvider	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The provider of the digital wallet.
ExpiryMonth	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Expire month if payment method is credit card.
ExpiryYear	
пиртгутсат	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	Expire year if payment method is credit card.
GatewayName	Туре
	string
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the payment gateway.
GatewayReference	Туре
	string

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> A reference number from the gateway for this payment instrument.
Last4	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Last 4 digits of payment method.
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The unique, auto-numbered name of the payment instrument.
OwnerId	<b>Type</b> reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> This field is a polymorphic relationship field.
	Relationship Name Owner

Field	Details
	Relationship Type
	Lookup
	Refers To
	Group, User
PaymentProcessorName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the payment processor.
ProcessorReference	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The reference of the payment processor associated with the payment instrument.
Type	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the type of the payment instrument.
	Possible values are:
	• ACH
	• BACS Debit
	• BECS Debit
	• Bancontact
	• Credit Card
	• PayPal
	• SEPA Direct Debit
	• Venmo
	• iDEAL
	- INDEAT

# **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.

## **PaymentInstrumentFeed**

Feed tracking is available for the object.

## **PaymentInstrumentHistory**

History is available for tracked fields of the object.

# PaymentInstrumentShare

Sharing is available for the object.

# PartyPhilanthropicAssessment

Represents a formalized assessment of wealth when a rating takes place, such as a third-party wealth assessment, a property valuation, a financial asset assessment, or an internal assessment. This object is available in API version 63.0 and later.

# **Supported Calls**

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

Field	Details
AccountId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The account associated with the assessment.
	This field is a relationship field.
	Relationship Name
	Account
	Refers To
	Account
AssessmentOrganizationId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The organization performing the assessment.
	This field is a relationship field.
	Relationship Name
	AssessmentOrganization

Field	Details
	Refers To Account
AssessmentType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The type of assessment, such as executive summary, donor brief, or third-party assessment
	Possible values are:
	• Donor Brief
	• Executive Summary
	Third Party Assessment
AssetLiquidationValue	<b>Type</b> currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of the party's assets that can be liquidated within a specified time period.
AttributedUserId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The person the research is attributed to.
	This field is a relationship field.
	Relationship Name AttributedUser
	Refers To User
BusinessOwnershipValue	Type currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of private businesses owned by the party.

Properties Create, Filter, Group, Nillable, Sort, Update  Description The contact associated with the assessment. This field is a relationship field.  Relationship Name Contact  Refers To Contact  Type date Properties Create, Filter, Group, Nillable, Sort, Update  Description The date of the assessment.  ExtendedSummary  Type (textarea Properties Create, Nillable, Update  Description A detailed summary of the assessment.  GivingLevel  Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The party's giving level. Possible values are:  \$1,000-\$24,999,999 \$10,000-\$24,999,999 \$10,000-\$24,999,999 \$10,000-\$24,999,999 \$10,000-\$24,999,999 \$10,000-\$24,999,999 \$10,000-\$24,999,999	Field	Details
Properties Create, Filter, Group, Nillable, Sort, Update  Description The contact associated with the assessment. This field is a relationship field.  Relationship Name Contact  Refers To Contact  Type date Properties Create, Filter, Group, Nillable, Sort, Update Description The date of the assessment.  ExtendedSummary  Type textarea Properties Create, Nillable, Update Description A detailed summary of the assessment.  GivingLevel  Type picklist Properties Create, Filter, Group, Nillable, Sort, Update Description The party's giving level. Possible values are: • \$1,000,000-\$4,999,999 • \$1,000-\$2,499 • \$10,000-\$24,999,999 • \$10,000-\$24,999,999 • \$10,000-\$24,999,999 • \$10,000-\$24,999,999 • \$10,000-\$24,999,999	ContactId	
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Properties Create, Nillable, Update  Description A detailed summary of the assessment.  GivingLevel  Type picklist Properties Create, Filter, Group, Nillable, Sort, Update  Description The party's giving level. Possible values are: \$1,000,000-\$4,999,999 \$10,000-\$24,999 \$10,000-\$24,999	ExtendedSummary	Туре
Create, Nillable, Update  Description A detailed summary of the assessment.  Type picklist  Properties Create, Filter, Group, Nillable, Sort, Update  Description The party's giving level. Possible values are: \$1,000,000-\$4,999,999 \$1,000-\$24,999 \$10,000-\$24,999 \$10,000-\$24,999		textarea
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Type picklist  Properties Create, Filter, Group, Nillable, Sort, Update  Description The party's giving level. Possible values are: \$1,000,000-\$4,999,999 \$10,000,000-\$24,999,999 \$10,000,000-\$24,999		
Properties Create, Filter, Group, Nillable, Sort, Update  Description The party's giving level.  Possible values are:  \$1,000,000-\$4,999,999  \$1,000-\$2,499  \$10,000,000-\$24,999,999  \$10,000-\$24,999		
Properties	GivingLevel	Туре
Create, Filter, Group, Nillable, Sort, Update  Description  The party's giving level.  Possible values are:  \$1,000,000-\$4,999,999  \$1,000-\$2,499  \$10,000,000-\$24,999,999  \$10,000-\$24,999		picklist
The party's giving level.  Possible values are:  \$1,000,000-\$4,999,999  \$1,000-\$2,499  \$10,000,000-\$24,999,999  \$10,000-\$24,999		
Possible values are:  \$1,000,000-\$4,999,999  \$1,000-\$2,499  \$10,000,000-\$24,999,999  \$10,000-\$24,999		
<ul> <li>\$1,000,000-\$4,999,999</li> <li>\$1,000-\$2,499</li> <li>\$10,000,000-\$24,999,999</li> <li>\$10,000-\$24,999</li> </ul>		
<ul> <li>\$1,000-\$2,499</li> <li>\$10,000,000-\$24,999,999</li> <li>\$10,000-\$24,999</li> </ul>		
<ul><li>\$10,000,000-\$24,999,999</li><li>\$10,000-\$24,999</li></ul>		
• \$10,000-\$24,999		
• \$100,000-\$249,999		
		• \$100,000-\$249,999
• \$100-\$499		• \$100-\$499
• \$2,500-\$4,999		• \$2,500-\$4,999

Field	Details
	• \$25,000,000+
	• \$25,000-\$49,999
	• \$250,000-\$999,999
	• \$5,000,000-\$9,999,999
	• \$5,000-\$9,999
	• \$50,000-\$99,999
	• \$500-\$999
	• Under \$100
GraduationCohort	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The party's graduation cohort, if the party is a person.
	Possible values are:
	• 0-5 Years Since Graduation
	• 11-20 Years Since Graduation
	• 21-30 Years Since Graduation
	• 31-40 Years Since Graduation
	• 41-50 Years Since Graduation
	• 50+ Years Since Graduation
	• 6-10 Years Since Graduation
GraduationStatus	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The party's graduation status, if the party is a person.
	Possible values are:
	• Associate Degree
	Certificate or Award
	• Multiple Degrees
	• Non-Graduate
	• Other
	Postgraduate Degree
	• Secondary Diploma
	<ul> <li>Undergraduate Degree</li> </ul>

Field	Details
Income	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The party's annual income.
LastReferencedDate	Туре
	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	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null,
	the user might have only accessed this record or list view (LastReferencedDate) but
	not viewed it.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated string or number assigned to the assessment.
OtherAssetsValue	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The value of the party's assets not covered by other measures of net worth.
OtherNonprofitGiftAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update

Field	Details
	<b>Description</b> The monetary value of the party's donations to other nonprofits.
OtherNonprofitGiftCount	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of the party's donations to other nonprofits.
OverallRating	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The overall rating determined by the assessment.
	Possible values are:
	• High
	<ul><li>Low</li><li>Medium</li></ul>
OwnerId	Type reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The user who owns this record.  This field is a polymorphic relationship field.
	This field is a polymorphic relationship field.  Relationship Name
	Owner
	<b>Refers To</b> Group, User
RealEstateValue	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of real estate owned by the party.

Field	Details
ResponsiblePersonId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The relationship officer assigned to the party.
	This field is a relationship field.
	Relationship Name ResponsiblePerson
	Refers To User
RetirementSavingsAmount	Туре
	currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The party's retirement savings.
ShortSummary	Туре
	textarea
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> A short summary of the assessment.
StockValue	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of public stock owned by the party.
StrengthsAndOpportunities	Type textarea
	Properties Create, Nillable, Update
	<b>Description</b> The strengths and opportunities identified in the assessment.

Field	Details
WeaknessesAndDrawbacks	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The weaknesses and drawbacks identified in the assessment.
WealthAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The party's total wealth.

# PartyPhilanthropicIndicator

Represents an unconfirmed or soft indication that highlights a person's wealth or growth potential. This object is available in API version 63.0 and later.

# **Supported Calls**

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

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The account associated with the indicator.
	This field is a relationship field.
	Relationship Name Account
	Refers To Account

Field	Details
AttributedUserId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The person the research is attributed to.
	This field is a relationship field.
	Relationship Name AttributedUser
	<b>Refers To</b> User
ContactId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The contact associated with the indicator.
	This field is a relationship field.
	Relationship Name
	Contact
	Refers To
	Contact
DateCollected	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date the information about the indicator was collected.
EstimatedValue	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The estimated monetary value of the indicator.
Indicator	Туре
	picklist

Field	Details
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The indicator, such as donation history, net worth, volunteer hours, or inheritance.
	Possible values are:
	Donation History
	• Inheritance
	Net Worth
	• Volunteer Hours
IndicatorType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The type of indicator, such as engagement, wealth, philanthropy, communication, volunteerism, or media mention.
	Possible values are:
	• Communication
	• Engagement
	• Media Mention
	<ul> <li>Philanthropy</li> </ul>
	• Volunteerism
	• Wealth
LastReferencedDate	Туре
	dateTime
	<b>Properties</b> 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	Туре
	dateTime
	Properties
	Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> An auto-generated string or number assigned to the party philanthropic indicator.
OtherSource	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> An indicator source that isn't a Salesforce object.
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The user who owns this record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	<b>Refers To</b> Group, User
ParticipantId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The person involved in collecting the research.
	This field is a relationship field.
	Relationship Name Participant

Field	Details
	Refers To Contact
PartyPhilanthropicOccurrenceId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The prospect research event associated with the indicator.
	This field is a relationship field.
	Relationship Name PartyPhilanthropicOccurrence
	Refers To PartyPhilanthropicOccurrence
RelatedOrganizationId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The organization involved in collecting the research.
	This field is a relationship field.
	Relationship Name RelatedOrganization
	Refers To Account
SourceId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The business milestone, life event, or interaction summary associated with the indicator.
	This field is a polymorphic relationship field.
	Relationship Name Source
	<b>Refers To</b> BusinessMilestone, InteractionSummary, PersonLifeEvent
SourceType	<b>Type</b> picklist

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The type of source, such as external interaction, internal data, third-party data, or public records.
	Possible values are:
	External Interaction
	• Internal Data
	• Public Records
	• Third-Party Data
Status	Туре
	picklist
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The status of the prospect research indicator, if it hasn't been verified as a party philanthropic occurrence.
	Possible values are:
	• Promoted
Summary	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	A summary of the indicator.

# PartyPhilanthropicMilestone

Represents philanthropic activities and financial status for a period of time. This object is available in API version 63.0 and later.

# **Supported Calls**

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

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The account associated with the milestone.
	This field is a relationship field.
	Relationship Name Account
	Refers To Account
AssetLiquidationValue	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of the party's assets that can be liquidated within a specified time period.
BusinessOwnershipValue	Type
	Create, Filter, Nillable, Sort, Update
	Description  FIXME: Add the description here. [Writers: - The following description was added by the developer when they created this field It may nor may not be correct, complete, or up to date It is visible to customers in Setup > Object Manager in the UI. If you need to change what is visible there, ask the developer to change it.] The value of private businesses owned by the party.
ContactId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The contact associated with the milestone.
	This field is a relationship field.
	Relationship Name Contact

Details
Refers To  Contact
Contact
Туре
date
Properties  Create Filter Cream Nillable Cart Hadate
Create, Filter, Group, Nillable, Sort, Update
<b>Description</b> The date of the milestone.
Туре
textarea
Properties  Croate Nillable Hedate
Create, Nillable, Update
<b>Description</b> A detailed summary of the milestone.
A declarica sammary of the milestone.
Туре
picklist
<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
Description
The party's giving level.
Possible values are:
• \$1,000,000-\$4,999,999
• \$1,000-\$2,499
• \$10,000,000-\$24,999,999
• \$10,000-\$24,999
• \$100,000-\$249,999
• \$100-\$499
• \$2,500-\$4,999
• \$25,000,000+
• \$25,000-\$49,999
• \$250,000-\$999,999
• \$5,000,000-\$9,999,999
• \$5,000-\$9,999
• \$50,000-\$99,999
• \$500-\$999
• Under \$100

Field	Details
GraduationCohort	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The person's graduation cohort.
	Possible values are:
	• 0-5 Years Since Graduation
	• 11-20 Years Since Graduation
	• 21-30 Years Since Graduation
	• 31-40 Years Since Graduation
	• 41-50 Years Since Graduation
	• 50+ Years Since Graduation
	• 6-10 Years Since Graduation
GraduationStatus	<b>Type</b> picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The person's graduation status.
	Possible values are:
	Associate Degree
	Certificate or Award
	• Multiple Degrees
	• Non-Graduate
	• Other
	• Postgraduate Degree
	Secondary Diploma
	• Undergraduate Degree
Income	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The party's annual income.

Field	Details
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	An auto-generated string or number assigned to the milestone.
OtherAssetsValue	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The value of the party's assets not covered by other measures of net worth.
OtherNonprofitGiftAmount	Туре
	currency
	Properties Create, Filter, Nillable, Sort, Update
	Description
	The monetary value of the party's donations to other nonprofits.
OtherNonprofitGiftCount	Type int
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The number of the party's donations to other nonprofits.
OverallRating	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The overall rating of the milestone.
	Possible values are:
	• High
	• Low
	• Medium
OwnerId	Type reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The user who owns this record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User
PtyPhilanthropicAsmtCnt	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of party philanthropic assessments within the milestone period.
PtyPhilanthropicIndCnt	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of party philanthropic indicators within the milestone period.

Field	Details
PtyPhilanthropicOccrCnt	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of party philanthropic occurrences within the milestone period.
RealEstateValue	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The value of real estate owned by the party.
ResponsiblePersonId	Туре
	reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The relationship officer assigned to the assessed party at the time the assessment milestone is generated.
	This field is a relationship field.
	Relationship Name ResponsiblePerson
	Refers To
	User
RetirementSavingsAmount	Туре
	currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The party's retirement savings.
ShortSummary	Туре
	textarea
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> A short summary of the milestone.

Field	Details
StockValue	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The value of public stock owned by the party.
StrengthsAndOpportunities	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description The through and according to a identified in the pull-state.
	The strengths and opportunities identified in the milestone.
WeaknessesAndDrawbacks	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The weaknesses and drawbacks identified in the milestone.
WealthAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The party's total wealth for the milestone.

# ${\bf PartyPhilanthropicOccurrence}$

xxx 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()

Field	Details
AccountId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The account associated with the occurrence.
	This field is a relationship field.
	Relationship Name Account
	Refers To Account
AttributedUserId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The user the research is attributed to.
	This field is a relationship field.
	<b>Relationship Name</b> AttributedUser
	<b>Refers To</b> User
ContactId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The contact associated with the occurrence.
	This field is a relationship field.
	Relationship Name Contact
	Refers To Contact
DateCollected	<b>Type</b> date

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date the information about the occurrence was collected.
EstimatedValue	<b>Type</b> currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The estimated monetary value of the occurrence.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (LastReferencedDate) but not viewed it.
Name	<b>Type</b> string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> An auto-generated string or number assigned to the party philanthropic occurrence.
OccurrenceType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The type of occurrence, such as donation history, net worth, volunteer hours, or inheritance.

Field	Details
	Possible values are:
	Donation History
	• Inheritance
	• Net Worth
	• Volunteer Hours
OtherSource	<b>Type</b> string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	An occurrence source that isn't a Salesforce record.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The user who owns this record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Refers To Group, User
ParticipantId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The participant contact involved in collecting the research.
	This field is a relationship field.
	Relationship Name Participant
	Refers To Contact
PartyPhilanthropicAssessmentId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The party philanthropic assessment associated with the occurrence.
	This field is a relationship field.
	Relationship Name PartyPhilanthropicAssessment
	Refers To PartyPhilanthropicAssessment
RelatedOrganizationId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The account of the organization that provided the occurrence.
	This field is a relationship field.
	Relationship Name RelatedOrganization
	Refers To Account
ResearchType	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The classification of research for the occurrence.
	Possible values are:
	• Communication
	• Engagement
	Media Mention
	• Philanthropy
	• Volunteerism
	• Wealth
SourceId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The business milestone, life event, or interaction summary associated wiith the occurrence.

Field	Details
	This field is a polymorphic relationship field.
	Relationship Name Source
	<b>Refers To</b> BusinessMilestone, InteractionSummary, PersonLifeEvent
SourceType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The type of source, such as external interaction, internal data, third-party data, or public records.
	Possible values are:
	External Interaction
	• Internal Data
	• Public Records
	• Third-Party Data
Summary	Туре
	textarea
	Properties
	Create, Nillable, Update
	<b>Description</b> A description of the occurrence.
VerificationType	<b>Type</b> picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies whether the occurrence is known or inferred.
	Possible values are:
	• Inferred
	• Known

# Fundraising Fields on Other Objects

Fundraising includes fields that are available on other Salesforce objects. These fields are available only in orgs with Nonprofit Cloud or Education Cloud when Fundraising is enabled.

#### ContactPointAddress

Represents a contact's billing or shipping address, which is associated with an individual or a person account. This object is available in API version 61.0 and later.

#### ContactProfile

Represents information about an individual, such as their ethnicity, citizenship, birth place, race, and so on. The Fundraising fields on this object are available in API version 59.0 and later.

#### ListEmail

Represents a list email sent from Salesforce, or sent from Account Engagement and synced to Salesforce. When the list email is sent, the recipients are generated by combining recipients in the ListEmailIndividualRecipients and ListEmailRecipientSource objects. Duplicate and other invalid recipients are removed. The result is the recipients are sent any given list email. ListEmail has a one-to-many relationship with ListEmailRecipientSource and ListEmailIndividualRecipient objects. This object is available in API version 61.0 and later.

# ContactPointAddress

Represents a contact's billing or shipping address, which is associated with an individual or a person account. This object is available in API version 61.0 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 Calls

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

# **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

# **Fields**

Field	Details
ActiveFromDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the contact's address became active.

Field	Details
ActiveToDate	Туре
	date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the contact's address is no longer active.
Address	Туре
	address
	<b>Properties</b> Filter, Nillable
	<b>Description</b> The full address.
AddressType	<b>Type</b> picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The type of address.
	Valid values are:
	• Billing
	• Shipping
BestTimeToContactEndTime	Туре
	time
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The latest time to contact the individual.
BestTimeToContactStartTime	Type time
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The earliest time to contact the individual.
BestTimeToContactTimezone	<b>Type</b> picklist

Field	Details
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The timezone applied to the best time to contact the individual.
City	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The address city.
ContactPointPhoneId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The primary phone number associated with this address.
	This field is a relationship field.
	Relationship Name
	ContactPointPhone
	Relationship Type
	Lookup
	Refers To
	ContactPointPhone
Country	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The address country.
GeocodeAccuracy	Туре
	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.

Field	Details
	Valid values are:
	• Address
	• Block
	• City
	• County
	• ExtendedZip
	• NearAddress
	• Neighborhood
	• State
	• Street
	• Unknown
	• Zip
IsDefault	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether a contact's address is the preferred method of communication (true)
	or not (false).
	The default value is false.
IsPrimary	Tuno
IsPrimary	rype
IsPrimary	<b>Type</b> boolean
Isrrimary	
Isrrimary	boolean
Isrrimary	boolean  Properties  Create, Defaulted on create, Filter, Group, Sort, Update  Description
IsPrimary	boolean  Properties  Create, Defaulted on create, Filter, Group, Sort, Update
IsPrimary	boolean  Properties  Create, Defaulted on create, Filter, Group, Sort, Update  Description
IsThirdPartyAddress	Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether a contact's address is their primary address (true) or not (false).
	Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether a contact's address is their primary address (true) or not (false).  The default value is false.
	Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether a contact's address is their primary address (true) or not (false). The default value is false.  Type boolean Properties
	Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether a contact's address is their primary address (true) or not (false). The default value is false.  Type boolean  Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether a contact's address is their primary address (true) or not (false). The default value is false.  Type boolean  Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description
	Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether a contact's address is their primary address (true) or not (false). The default value is false.  Type boolean  Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether the address is associated with a third party (true) or not (false).
	Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether a contact's address is their primary address (true) or not (false). The default value is false.  Type boolean  Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description
	Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether a contact's address is their primary address (true) or not (false). The default value is false.  Type boolean  Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description Indicates whether the address is associated with a third party (true) or not (false).

Field	Details
	Properties Control of the Control of
	Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the address is undeliverable (true) or not (false).
	The default value is false.
LastAddressStdDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The most recent date and time that the address was evaluated by the address standardization provider.
LastAddressStdStatus	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The most recent status received from the address standardization provider.
LastChangeOfAddressDate	<b>Type</b> dateTime
	Properties  Create, Filter, Nillable, Sort, Update
	<b>Description</b> The most recent date and time that the address was evaluated by the change of address provider.
LastChangeOfAddressStatus	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The status of the latest change of address request.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp for when the current user last referenced a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> 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.
Latitude	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> 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.
Longitude	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> 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.
Name	<b>Type</b> string
	Properties  Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> Required. The name of the contact point address record.
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the account's owner associated with this contact.
	This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
ParentId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of the contact's parent record. Only an individual or account can be a contact's parent.
	This field is a polymorphic relationship field.
	Relationship Name Parent
	Relationship Type  Master-detail
	Refers To Account, Individual (the master object)
PostalCode	Туре
	String
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The address postal code.
PreferenceRank	<b>Type</b> int
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The preference rank when there are multiple contact point addresses.
SeasonalEndDay	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The day when the seasonal address of the contact is replaced by the default address.

Field	Details
	Valid values are: 1−31
SeasonalEndMonth	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The month when the seasonal address of the contact is replaced by the default address.
	Valid values are: 1−12
SeasonalStartDay	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The day when the seasonal address of the contact replaces the default address.
	Valid values are: 1−31
SeasonalStartMonth	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The month when the seasonal address of the contact replaces the default address.  Valid values are: 1–12
State	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The address state.
Street	<b>Type</b> textarea
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The address street.

Fundraising ContactProfile

Field	Details
UsageType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The usage type of this address. For instance, whether it's a work address or a home address. Valid values are:
	<ul><li>Home</li><li>Inactive</li></ul>
	<ul><li>Temporary</li><li>Work</li></ul>

# ContactProfile

Represents information about an individual, such as their ethnicity, citizenship, birth place, race, and so on. The Fundraising fields on this object are available in API version 59.0 and later.

# **Supported Calls**

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

# **Fields**

Field	Details
AssetLiquidationValue	Type currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of assets that can be liquidated within 90 days.
BusinessOwnershipValue	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of private businesses the contact owns.

Fundraising ContactProfile

Income Typ			
	Туре		
	currency		
Pro	pperties		
	Create, Filter, Nillable, Sort, Update		
De	scription		
	The annual income amount of the contact.		
Location Typ	pe		
	string		
Pro	pperties		
	Create, Filter, Group, Nillable, Sort, Update		
De	scription		
	The location where the contact currently resides.		
OtherAssetsValue Typ	pe		
•//	currency		
Pro	pperties		
	Create, Filter, Nillable, Sort, Update		
De	scription		
	The value of the contact's assets that aren't covered by other ways of measuring net worth.		
OtherNonprofitGiftAmount Tyl	De .		
-21	currency		
Pro	pperties		
	Create, Filter, Nillable, Sort, Update		
De	scription		
	The amount of donations the contact has given to other nonprofits.		
OtherNonprofitGiftCount Type	ne		
• • • • • • • • • • • • • • • • • • • •	int		
Pro	pperties		
	Create, Filter, Group, Nillable, Sort, Update		
De	scription		
	The number of donations the contact has given to other nonprofits.		
RealEstateValue Typ	pe		
• 71	currency		
Pro	pperties		
	Create, Filter, Nillable, Sort, Update		
De	scription		
	The value of real estate the contact owns.		

ield Details	
RecurringDonorType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of recurring donor.
	Possible values are:
	• Active
	• Former
	• Lapsed
RetirementSavingsAmount	Type currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount of the contact's retirement savings.
StockValue	<b>Type</b> currency
	Properties  Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of public stock the contact owns.
Website	Type url
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> A website that's associated with the contact.

For more information, see ContactProfile in Education Cloud.

# ListEmail

Represents a list email sent from Salesforce, or sent from Account Engagement and synced to Salesforce. When the list email is sent, the recipients are generated by combining recipients in the ListEmailIndividualRecipients and ListEmailRecipientSource objects. Duplicate and other invalid recipients are removed. The result is the recipients are sent any given list email. ListEmail has a one-to-many relationship with ListEmailRecipientSource and ListEmailIndividualRecipient objects. This object is available in API version 61.0 and later.

# **Supported Calls**

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

# Special Access Rules

This object is available to Marketing Cloud users with the Fundraising Access permission set on Marketing Cloud Growth Edition campaigns.

# **Fields**

Field	Details		
CampaignId	<b>Type</b> reference		
	Properties  Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The ID of the related campaign.		
	This field is a relationship field.		
	Relationship Name Campaign		
	Relationship Type  Lookup		
	<b>Refers To</b> Campaign		
FromAddress	Туре		
	textarea		
	<b>Properties</b> Create, Filter, Update		
	<b>Description</b> Read-only except when the list email is in a draft state. Validated against user's addresses.		
FromName	<b>Type</b> string		
	Properties  Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> Read-only except when the list email is in a draft state. Validated against user's addresses. This field is null for emails sent from Account Engagement.		
HasAttachment	<b>Type</b> boolean		

Field	Details		
	Properties		
	Defaulted on create, Filter, Group, Sort		
	<b>Description</b> Read-only. Defaulted on create and update. Indicates if the list email has an attachment (true) or not (false). This field is null for emails sent from Account Engagement.		
	The default value is false.		
HtmlBody	Туре		
	textarea		
	Properties		
	Create, Nillable, Update		
	Description		
	The body of the list email. This field is null for emails sent from Account Engagement.		
	List emails can contain up to 32,000 characters for the body. These limits include visible characters and other characters in the email, including markup.		
IsOutreachSourceCodeEnabled	Туре		
	boolean		
	Properties		
	Defaulted on create, Filter, Group, Sort		
	Description		
	Indicates whether outreach source code can be added to this record (true) or not (false).		
	The default value is false.		
	This field is a calculated field.		
IsTracked	Type boolean		
	Properties  Defaulted on create, Filter, Group, Sort		
	·		
	Description Indicates if email tracking was on when the list email was sent (true) or not (false). This field is blank for emails sent from Account Engagement and synced to Salesforce. This field is null for emails sent from Account Engagement.		
	The default value is false.		
LastReferencedDate	Туре		
	dateTime		
	Properties		
	Filter, Nillable, Sort		

Field	Details			
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.			
LastViewedDate	<b>Type</b> dateTime			
	Properties Filter, Nillable, Sort			
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate isn't null, the user accessed this record or list view indirectly.			
Name	<b>Type</b> string			
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update			
	<b>Description</b> Read-only except when the list email is in a draft state.			
OutreachSourceCodeId	<b>Type</b> reference			
	Properties Create, Filter, Group, Nillable, Sort, Update			
	<b>Description</b> The outreach source code associated with the gift transaction.			
	This field is a relationship field.			
	<b>Relationship Name</b> OutreachSourceCode			
	Relationship Type Lookup			
	Refers To OutreachSourceCode			
OwnerId	<b>Type</b> reference			
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update			
	<b>Description</b> The ID of the owner of this object.			
	This field is a polymorphic relationship field.			

Field	Details
	Relationship Name Owner
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> Group, User
ScheduledDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> Read-only. If null and Status is set to Scheduled, then defaults to created time.
Status	<b>Type</b> picklist
	Properties  Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> Read-only except when the list email is in a draft state.
	Changing the status to Scheduled causes the list email to be sent.
	Valid values are:
	• Cancelled
	• Draft
	• LimitError
	• Running
	• Scheduled
	• Sent
Subject	Туре
	textarea
	<b>Properties</b> Create, Filter, Nillable, Update
	<b>Description</b> Read-only except when the list email is in a draft state. This field is null for emails sent from Account Engagement.
	List emails can contain up to 3,000 characters for the subject. These limits include visible characters and other characters in the email, including markup.

Fundraising Fundraising Business APIs

Field	Details
TextBody	<b>Type</b> textarea
	Properties Create, Nillable, Update
	<b>Description</b> Read-only except when the list email is in a draft state. This field is null for emails sent from Account Engagement.
TotalSent	<b>Type</b> int
	Properties  Defaulted on create, Filter, Group, Nillable, Sort
	<b>Description</b> Read-only. The total number of list emails sent, including bounced, opted-out, and invalid To: addresses.

# **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.

# ListEmailChangeEvent

Change events are available for the object.

#### ListEmailFeed

Feed tracking is available for the object.

# ListEmailHistory

History is available for tracked fields of the object.

#### ListEmailOwnerSharingRule

Sharing rules are available for the object.

#### ListEmailShare

Sharing is available for the object.

# Fundraising Business APIs

You can access Salesforce Fundraising APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs. To use the Fundraising Business Process APIs:

- Enable Fundraising in your org.
- Enable donor matching method. See Configure Fundraising Settings. See the FundraisingConfig object to know about the donor matching method details.
- Selet a default gift designation. See Gift Designation.

Fundraising Resources

Configure the duplicate and matching rules for the Account and Contact objets, Or set Duplicate Matching in Settings to No Matching.
 See Customize Duplicate Management.

The Fundraising Business Process APIs help teams create strong integrations using industry-standard tools. Use the Salesforce composite Fundraising BP API to send a single complex payload instead of making multiple calls using multiple APIs to various objects. Developer-friendly APIs don't require a detailed and complete understanding of the NPC data model, greatly simplifying integrations. These APIs offer scalability and flexibility through features like automatic record matching, batch processing, bulk operations, and dynamic data mapping. Five robust endpoints are currently available to:

- Create bulk gift transactions with related donor and designations
- Create bulk gift commitments with related donor, schedule, and default designations
- Modify the future recurring schedule on a gift commitment
- Apply payment update metadata to gift transactions and future gift commitment installments

The Fundraising Business Process APIs are available as a standard Salesforce Connect API REST endpoint as well as through Apex.

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

To use Business APIs on the Postman API platform, see the Postman collection for Fundraising.

#### Resources

Learn more about the available Fundraising API resources.

#### **Request Bodies**

Learn more about the available Fundraising API request bodies.

#### **Response Bodies**

Learn more about the available Fundraising API response bodies.

# Resources

Learn more about the available Fundraising API resources.

#### Gifts Transactions (POST)

Create gift transactions with related new or matched donor, optional transaction designations, and payment-instrument metadata. This API supports custom fields for the donor account and gift transaction.

#### Commitments (POST)

Create recurring gift commitments and schedules, along with associated new or matched donor. Customize fields for donor accounts, gift commitments, and schedules.

# Commitments (PATCH)

Modify the data for the schedule, campaign, outreach source code, donor, and payment instrument on an active gift commitment.

### Transactions Payment Updates (POST)

Update the gateway and processor metadata for gift transactions. This API supports updating only the properties that are specified in the reuest body. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

# Commitments Payment Updates (POST)

Update the metadata for your payment instruments for all active gift commitments.

**Fundraising** Resources

# Gifts Transactions (POST)

Create gift transactions with related new or matched donor, optional transaction designations, and payment-instrument metadata. This API supports custom fields for the donor account and gift transaction.

#### Resource

```
/connect/fundraising/gifts
```

#### Resource example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/gifts
```

#### **Available version**

60.0

#### **HTTP** methods

**POST** 

#### **Request body for POST**



🕜 Note: You can pass the campaign, donor, and designation IDs in an externalId object containing fieldName and fieldValue.

```
"processingOptions": {
    "donorOptions": {
      "defaultUpdateLogic": "update all"
  },
  "gifts": [
    {
      "amount": 150.25,
      "currencyIsoCode": "USD",
      "receivedDate": "2024-07-06",
      "donorCoverAmount": 0.25,
      "transactionStatus": "Unpaid",
      "commitmentId": "00x324303243fsfd",
      "paymentIdentifier": "1234",
      "gatewayTransactionFee": 0.75,
      "processorTransactionFee": 0.45,
      "processorReference": "cls-1247586928747",
      "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
      "lastGatewayResponseCode": "invalid cvc",
      "lastGatewayErrorMessage": "The card's security code is invalid. Check the
card's security code or use a different card.",
      "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z",
      "campaign": {
        "id": "701y0030d0zk6t06f4"
      "outreachSourceCode": {
        "id": "0gx000d0d0d0FD",
        "sourceCode": "AnimalEmailCampaign2023"
      "donor": {
        "donorType": "individual",
```

Fundraising Resources

```
"id": "0015500000W01ZiAAL",
    "firstName": "Daniel",
    "lastName": "Chavez",
    "phone": "510-432-1234",
    "email": "danielchavez@salesforce.com",
    "address": [
     {
        "street": "123 Main Street",
        "city": "Oakland",
        "state": "CA",
        "postalCode": "94610",
        "country": "US"
    ],
    "accountCustomFields": [
        "fieldName": "string",
        "fieldValue": "string"
   ]
 },
  "paymentInstrument": {
   "type": "credit card",
   "accountHolderName": "Daniel Chavez",
   "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "Diners club",
    "bankName": "chase",
    "digitalWalletProvider": "Diner's Club",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
 },
  "designations": [
      "designationId": "0gd0030f0303024",
     "percent": 10,
      "amount": 150.25
   }
  "giftTransactionCustomFields": [
      "fieldName": "string",
      "fieldValue": "string"
   }
 ]
}
```

**Fundraising** Resources

```
]
```

# **Properties**

Name	Туре	Description	Required or Optional	Available Version
gifts	Create Gift Request Input[]	Details of the request to create the gift.	Required	60.0
processing Options	Processing Options Details Input	Options for the donor matching process.	Optional	60.0

# **Response body for POST**

Create Gift

SEE ALSO:

Nonprofit Cloud Developer Guide: Fundraising

# Commitments (POST)

Create recurring gift commitments and schedules, along with associated new or matched donor. Customize fields for donor accounts, gift commitments, and schedules.

# Resource

```
/connect/fundraising/commitments
```

# Resource example

https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/commitments

#### Available version

60.0

# **HTTP** methods

**POST** 

# **Request body for POST**



🕜 Note: You can pass the campaign, donor, and designation IDs in an externalId object containing fieldName and

```
"processingOptions": {
 "donorOptions": {
   "defaultUpdateLogic": "update all"
},
"commitments": [
   "amount": 150.25,
```

Fundraising Resources

```
"type": "pledge",
"currencyIsoCode": "USD",
"transactionPeriod": "monthly",
"transactionInterval": 3,
"transactionDay": "5",
"startDate": "2024-07-06",
"endDate": "2024-07-06",
"campaign": {
  "id": "701y0030d0zk6t06f4"
"outreachSourceCode": {
  "id": "0gx000d0d0d0FD",
  "sourceCode": "AnimalEmailCampaign2023"
},
"donor": {
  "donorType": "individual",
  "id": "0015500000W01ZxxAL",
  "organizationName": "mini cat town",
  "firstName": "Daniel",
  "lastName": "Chavez",
  "phone": "510-432-9876",
  "email": "d.chavez.com",
  "address": [
    {
      "street": "123 Main Street",
      "city": "Oakland",
      "state": "CA",
      "postalCode": "94610",
      "country": "US"
  ],
  "accountCustomFields": [
      "fieldName": "string",
      "fieldValue": "string"
  ]
},
"paymentInstrument": {
  "type": "Credit Card",
  "accountHolderName": "Daniel Chavez",
  "expiryMonth": "10",
  "expiryYear": "2026",
  "last4": "4321",
  "cardBrand": "Diner's Club",
  "bankName": "chase",
  "digitalWalletProvider": "EwalletProvider",
  "bankAccountHolderType": "primary",
  "bankAccountType": "checking",
  "bankAccountNumber": "123456",
  "bankCode": "HBUK",
  "gatewayName": "Gateway",
  "processorName": "Centpro",
  "processorPaymentReference": "string",
```

Fundraising Resources

```
"gatewayReference": "string"
      },
      "designations": [
          "designationId": "0gd0030f0303024",
          "percent": 10
       }
      ],
      "firstTransaction": {
        "amount": 150.25,
        "receivedDate": "2024-07-06",
        "donorCoverAmount": 0.25,
        "transactionStatus": "Unpaid",
        "gatewayTransactionFee": 0.75,
        "processorTransactionFee": 0.45,
        "processorReference": "cls-1247586928747",
        "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
        "lastGatewayResponseCode": "invalid cvc",
        "lastGatewayErrorMessage": "The card's security code is invalid. Check the
card's security code or use a different card.",
       "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
      "giftCommitmentCustomFields": [
          "fieldName": "string",
          "fieldValue": "string"
       }
      ],
      "giftCommitmentScheduleCustomFields": [
       {
          "fieldName": "string",
          "fieldValue": "string"
        }
      ]
    }
  ]
```

# **Properties**

Name	Туре	Description	Required or Optional	Available Version
commitments	Create Commitment	Details of the request to create the commitment.	Required	60.0
	Request Input[]	Limited to 100 commitments in a single request.		
processing Options	Processing Options Details Input	Options for the donor matching process.	Optional	60.0

**Fundraising** Resources

# **Response body for POST**

Create Commitment

SEE ALSO:

Nonprofit Cloud Developer Guide: Fundraising

# Commitments (PATCH)

Modify the data for the schedule, campaign, outreach source code, donor, and payment instrument on an active gift commitment.

#### Resource

```
/connect/fundraising/commitments/commitmentId
```

### Resource example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect
/fundraising/commitments/6qc0000AbCdZF9q
```

### **Available version**

60.0

#### **HTTP** methods

PATCH

#### Request body for PATCH



🕜 Note: You can pass the campaign, donor, and designation IDs in an externalId object containing fieldName and fieldValue.

```
"amount": 150.25,
"type": "pledge",
"transactionInterval": 3,
"transactionDay": "5",
"startDate": "2024-07-06",
"endDate": "2024-07-06",
"campaign": {
  "id": "701y0030d0zk6t06f4"
},
"outreachSourceCode": {
  "id": "0gx000d0d0d0FD",
  "sourceCode": "AnimalEmailCampaign2023"
},
"donor": {
  "donorType": "individual",
  "organizationName": "ABC Inc.",
  "firstName": "Daniel",
  "lastName": "Chavez",
  "phone": "510-434-8920",
  "email": "d.chavez@salesforce.com",
  "address": [
    {
```

Fundraising Resources

```
"street": "123 Main Street",
      "city": "Oakland",
      "state": "CA",
      "postalCode": "94610",
      "country": "US"
   }
  ],
  "accountCustomFields": [
      "fieldName": "string",
      "fieldValue": "string"
    }
  ],
  "paymentInstrument": {
    "type": "Credit Card",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "Diner's Club",
    "bankName": "chase",
    "digitalWalletProvider": "EProvider",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "Centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  "giftCommitmentCustomFields": [
      "fieldName": "string",
      "fieldValue": "string"
  ],
  "giftCommitmentScheduleCustomFields": [
      "fieldName": "string",
      "fieldValue": "string"
    }
  ]
}
```

# **Properties**

amount Dou	/pe	Description	Required or Optional	Available Version
amount bou		Gift amount of each transaction associated with the gift commitment schedule.	Required	60.0

Name	Туре	Description	Required or Optional	Available Version
campaign	Campaign Details	Campaign that's associated with the gift commitment.	Optional	60.0
currency IsoCode	String	Currency ISO code of the gift commitment.	Optional	60.0
donorId	Donor Details Input	Person, household, or organization account associated with the commitment.	Optional	60.0
endDate	String	End date of the new schedule for this gift commitment. The format is YYYY-MM-DD.	Optional	60.0
giftCommitment CustomFields		Custom fields of the gift commitment.	Optional	60.0
giftCommitment Schedule CustomFields	Custom Field Details[]	Custom fields of the gift commitment schedule.	Optional	60.0
outreach SourceCode	Outreach Source Code Details	Outreach source code that's associated with the campaign for the gift commitment.	Optional	60.0
payment Instrument	Payment Instrument Details	Payment instrument that's used to complete the transaction.	Required	60.0
startDate	String	Start date of the new schedule for this gift commitment. The format is YYYY-MM-DD.	Required	60.0
transaction Day	String	Specifies the day of the month to create gift transactions in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction is created on the last day for the months that don't have that many days.	Optional	60.0
transaction Interval	Integer	Transaction interval that's applicable to an incoming transaction in the commitment.	Optional	60.0
transaction Period	String	Transaction period that's applicable to the incoming transaction in the commitment. When type is pledge, this property must be set to Custom. If transactionPeriod is not provided, the default isCustom.	Required	60.0

Fundraising Resources

Name	Туре	Description	Required or Optional	Available Version
type	String	Type of transaction. Possible values are: • Pledge	Optional	62.0
		<ul> <li>Recurring</li> <li>The default value is the Recurring.</li> </ul>		

# **Response body for PATCH**

Update Commitment on page 207

SEE ALSO:

Nonprofit Cloud Developer Guide: Fundraising

# Transactions Payment Updates (POST)

Update the gateway and processor metadata for gift transactions. This API supports updating only the properties that are specified in the request body. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

#### Resource

```
/connect/fundraising/transactions/payment-updates
```

# Resource example

https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/transactions/payment-updates

#### **Available version**

60.0

#### **HTTP** methods

POST

# **Request body for POST**



Note: You can pass the transaction ID in an externalId object containing fieldName and fieldValue.

**Fundraising** Resources

### **Properties**

Name	Туре	Description	Required or Optional	Available Version
updates	Transaction Payment Update Request Input[]	Contains the details of the request to update the transaction payment.	Required	60.0

# **Response body for POST**

Transaction Payment Updates on page 205

SEE ALSO:

Nonprofit Cloud Developer Guide: Fundraising

# Commitments Payment Updates (POST)

Update the metadata for your payment instruments for all active gift commitments.

#### Resource

/connect/fundraising/commitments/payment-updates

# Resource example

https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/commitments/payment-updates

#### **Available version**

60.0

#### **HTTP** methods

POST

#### **Request body for POST**



Note: You can pass the commitment ID in an externalId object containing fieldName and fieldValue.

```
"updates": [
    "giftCommitmentId": "6TR5500000WO1ZIFGE",
    "paymentInstrument": {
     "type": "Venmo",
      "accountHolderName": "Daniel Chavez",
      "expiryMonth": "10",
      "expiryYear": "2026",
      "last4": "4321",
      "cardBrand": "visa",
      "bankName": "chase",
      "digitalWalletProvider": "Diner's Club",
      "bankAccountHolderType": "primary",
      "bankAccountType": "checking",
```

```
"bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "Centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
}
}
```

### **Properties**

Name	Туре	Description	Required or Optional	Available Version
updates	Commitment Payment Updates Request Input[]	Contains the request details to update the commitment payment.	Required	60.0

# **Response body for POST**

Commitment Payment Updates

SEE ALSO:

Nonprofit Cloud Developer Guide: Fundraising

# **Request Bodies**

Learn more about the available Fundraising API request bodies.

#### Address Details

Input representation of the donor's address details.

# Campaign Details Input

Input representation of the campaign that's associated with the gift transaction.

### Commitment Payment Updates Input

Input representation of the details of the payment update to the fundraising commitments.

# Commitment Payment Updates Request Input

Input representation of the details of the gift commitment and payment instrument.

# Create Commitment Input

Input representation of the request to create commitments.

# Create Commitment Request Input

Input representation of the request to create a recurring gift commitment. This request body accepts an array of commitment requests. However, for the API version 60.0, only a single commitment is supported per request.

# Create Gift Input

Input representation of the request to create gifts, including donor details, amount, and payment method.

# Create Gift Request Input

Input representation of the data required to create a new gift. This request body accepts both standard and custom fields for donor account and gift transaction. If a standard field does not appear in the request body, you can include it in the customFields section for the relevant object.

#### Custom Field Details Input

Input representation of the custom fields for the request to incorporate custom attributes into records.

#### Designation Details Input

Input representation of the designations that are associated with the request.

#### **Donor Details Input**

Input representation of the donor details that's associated with the gift transaction.

## **Donor Options Details Input**

Input representation of the available donor processing options that includes targeted update logic for the donor-related components of the commitment transaction.

#### Outreach Source Code Details Input

Input representation of the outreach source code that's associated with the request.

#### Payment Instrument Details Input

Input representation of the payment instrument used for the request.

#### Processing Options Details Input

Input representation of the donor processing options.

#### Transaction Details Input

Input representation of the transaction details.

# Transaction Payment Update Request Input

Input representation of the details of the gateway and processor metadata to update the transaction payment. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

#### Transaction Payment Updates Input

Input representation of the gateway and processor metadata to update the transaction payment. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

# **Update Commitment Input**

Input representation of the request to update a commitment.

# **Address Details**

Input representation of the donor's address details.

```
{
  "street": "123 Main Street",
  "city": "Oakland",
  "state": "CA",
  "postalCode": "94610",
  "country": "US"
}
```

# **Properties**

Name	Туре	Description	Required or Optional	Available Version
city	String	City of the donor.	Required	60.0
country	String	Country of the donor.	Required	60.0
postalCode	String	Postal code of the donor.	Required	60.0
state	String	State of the donor.	Required	60.0
street	String	Street name of the donor.	Required	60.0

# Campaign Details Input

Input representation of the campaign that's associated with the gift transaction.

# JSON example

```
{
  "campaign": {
    "id": "701y0030d0zk6t06f4"
    }
}
```

# **Properties**

Name	Туре	Description	Required or Optional	Available Version
id	String	ID of the gift designation. This ID can also be passed as an externalID in the format given below:	Optional	60.0
		{ "externalId": {		
		"fieldName": " <external_id_field_name>",</external_id_field_name>		
		"fieldValue":		
		" <external_id_field_value>"</external_id_field_value>		
		},		

# Commitment Payment Updates Input

Input representation of the details of the payment update to the fundraising commitments.

# JSON example

```
"updates": [
    "giftCommitmentId": "6TR5500000W01ZIFGE",
    "paymentInstrument": {
     "type": "Venmo",
      "accountHolderName": "Daniel Chavez",
      "expiryMonth": "10",
      "expiryYear": "2026",
      "last4": "4321",
      "cardBrand": "visa",
      "bankName": "chase",
      "digitalWalletProvider": "Diner's Club",
      "bankAccountHolderType": "primary",
      "bankAccountType": "checking",
      "bankAccountNumber": "123456",
      "bankCode": "HBUK",
      "gatewayName": "Gateway",
      "processorName": "Centpro",
      "processorPaymentReference": "string",
      "gatewayReference": "string"
 }
]
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
updates	Commitment Payment Updates Request Input[]	Contains the request details to update the commitment payment.	Required	60.0

# **Commitment Payment Updates Request Input**

Input representation of the details of the gift commitment and payment instrument.

#### JSON example



Note: You can pass the campaign, donor, and designation IDs in an externalId object containing fieldName and fieldValue.

```
"giftCommitmentId": "6TR5500000Wo1ZIFGE",
"paymentInstrument": {
    "type": "Venmo",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
```

```
"cardBrand": "visa",
  "bankName": "chase",
  "digitalWalletProvider": "Diner's Club",
  "bankAccountHolderType": "primary",
  "bankAccountType": "checking",
  "bankAccountNumber": "123456",
  "bankCode": "HBUK",
  "gatewayName": "Gateway",
  "processorName": "Centpro",
  "processorPaymentReference": "string",
  "gatewayReference": "string"
}
```

# **Properties**

Name	Туре	Description	Required or Optional	Available Version
gift CommitmentId	String	ID of the gift commitment record for the payment update. This ID can also be passed as an externalID in the format given below:	Required	60.0
		{ "externalId": {		
		"fieldName": " <external_id_field_name>",</external_id_field_name>		
		"fieldValue":		
		" <external_id_field_value>"</external_id_field_value>		
		},		
payment Instrument	Payment Instrument Details Input on page 187	Contains details about the payment instrument.	Required	60.0

# Create Commitment Input

Input representation of the request to create commitments.

```
"processingOptions": {
    "donorOptions": {
        "defaultUpdateLogic": "update_all"
     }
},
"commitments": [
```

```
"amount": 150.25,
"type": "pledge",
"currencyIsoCode": "USD",
"transactionPeriod": "monthly",
"transactionInterval": 3,
"transactionDay": "5",
"startDate": "2024-07-06",
"endDate": "2024-07-06",
"campaign": {
 "id": "701y0030d0zk6t06f4"
"outreachSourceCode": {
 "id": "0gx000d0d0d0fD",
  "sourceCode": "AnimalEmailCampaign2023"
},
"donor": {
  "donorType": "individual",
  "id": "0015500000W01ZxxAL",
  "organizationName": "mini cat town",
  "firstName": "Daniel",
  "lastName": "Chavez",
  "phone": "510-432-9876",
  "email": "d.chavez.com",
  "address": [
      "street": "123 Main Street",
      "city": "Oakland",
      "state": "CA",
      "postalCode": "94610",
      "country": "US"
    }
  ],
  "accountCustomFields": [
      "fieldName": "string",
      "fieldValue": "string"
  1
},
"paymentInstrument": {
  "type": "Credit Card",
  "accountHolderName": "Daniel Chavez",
  "expiryMonth": "10",
  "expiryYear": "2026",
  "last4": "4321",
  "cardBrand": "Diner's Club",
  "bankName": "chase",
  "digitalWalletProvider": "EwalletProvider",
  "bankAccountHolderType": "primary",
  "bankAccountType": "checking",
  "bankAccountNumber": "123456",
  "bankCode": "HBUK",
  "gatewayName": "Gateway",
```

```
"processorName": "Centpro",
      "processorPaymentReference": "string",
      "gatewayReference": "string"
     "designations": [
         "designationId": "0gd0030f0303024",
         "percent": 10
      }
    ],
     "firstTransaction": {
      "amount": 150.25,
      "receivedDate": "2024-07-06",
      "donorCoverAmount": 0.25,
      "transactionStatus": "Unpaid",
      "gatewayTransactionFee": 0.75,
      "processorTransactionFee": 0.45,
      "processorReference": "cls-1247586928747",
      "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
      "lastGatewayResponseCode": "invalid cvc",
      "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's
security code or use a different card.",
      "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
    },
     "giftCommitmentCustomFields": [
         "fieldName": "string",
         "fieldValue": "string"
      }
    ],
     "giftCommitmentScheduleCustomFields": [
         "fieldName": "string",
        "fieldValue": "string"
      }
]
```

Name	Туре	Description	Required or Optional	Available Version
commitments	Create Commitment Request Input[]	Details of the request to create the commitment.	Required	60.0
		Limited to 100 commitments in a single request.		
processing Options	Processing Options Details Input	Options for the donor matching process.	Optional	60.0

## Create Commitment Request Input

Input representation of the request to create a recurring gift commitment. This request body accepts an array of commitment requests. However, for the API version 60.0, only a single commitment is supported per request.

To include the standard fields for the donor account and gift transaction, use the Custom Field Details Input request body to specify the standard fields.

#### JSON example



Note: You can pass the campaign, donor, and designation IDs in an externalId object containing fieldName and fieldValue.

```
"commitments": [
 {
   "amount": 15,
   "type": "pledge",
   "currencyIsoCode": "USD",
   "transactionInterval": 1,
   "transactionDay": "1",
   "startDate": "2023-11-01",
    "endDate": "",
    "outreachSourceCode": {
      "sourceCode": "AnimalEmailCampaign2023"
   },
   "donor": {
     "donorType": "individual",
     "id": "0015500000W01ZixxL",
     "firstName": "Daniel",
     "lastName": "Chavez",
      "phone": "510-432-1234",
      "email": "d.chavez@salesforce.com",
      "address": [
        {
          "street": "123 Main Street",
          "city": "Tardis",
          "state": "NJ",
          "postalCode": "08638",
          "country": "US"
        }
      ],
      "accountCustomFields": [
          "fieldName": "string",
          "fieldValue": "string"
      ]
    },
    "paymentInstrument": {
      "type": "Credit Card",
      "accountHolderName": "Daniel Chavez",
     "expiryMonth": "10",
     "expiryYear": "2026",
     "last4": "4321",
      "cardBrand": "Diner's Club",
```

```
"bankName": "chase",
      "digitalWalletProvider": "",
      "bankAccountHolderType": "primary",
      "bankAccountType": "checking",
      "bankAccountNumber": "123456",
      "bankCode": "HBUK",
      "gatewayName": "Gateway",
      "processorName": "Centpro",
      "processorPaymentReference": "string",
      "gatewayReference": "string"
    },
    "designations": [
        "designationId": "0gd0030f0303xx4",
        "percent": 0
     }
    ],
    "firstTransaction": {
      "amount": 15,
      "receivedDate": "2023-11-02",
     "donorCoverAmount": 0.25,
      "transactionStatus": "Paid",
      "gatewayTransactionFee": 0.75,
      "processorTransactionFee": 0.045,
      "processorReference": "cls-1247586928747",
      "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
      "lastGatewayResponseCode": "",
      "lastGatewayErrorMessage": "",
      "lastGatewayProcessedDateTime": "2023-11-02T21:57:51Z"
  }
]
```

Name	Туре	Description	Required or Optional	Available Version
accountOustonFields	Custom Field Details Input[]	Standard and custom fields for the donor account.	Optional	60.0
amount	Double	Expected amount of the gift transaction in the commitment schedule.	Required	60.0
campaign	Campaign Details Input	Campaign that's associated with the commitment.	Optional	60.0
currency IsoCode	String	Currency ISO code for the commitment.	Optional	60.0
designations	Designation Details Input[]	Default gift designations that are associated with the commitment.	Optional	60.0

Name	Туре	Description	Required or Optional	Available Version
donor	Donor Details Input	Person, household, or organization account that's associated with the commitment.	Required	60.0
endDate	String	Date when the total amount of the commitment is expected to be paid. The default format is YYYY-MM-DD.	Required	60.0
first Transaction	Transaction Details Input	First transaction of the commitment. Note: When type is pledge, this property cannot be included.	Optional	60.0
giftCommitment CustomFields	Custom Field Details Input[]	Standard and custom fields of the gift commitment.	Optional	60.0
giftCommitment Schedule CustomFields	Custom Field Details Input[]	Standard and custom fields of the gift commitment schedule.	Optional	60.0
outreach SourceCode	Outreach Source Code Details Input	Outreach source code that's associated with the campaign for the gift commitment schedule.	Optional	60.0
payment Instrument	Payment Instrument Details Input	Payment instrument that's used to complete the transaction.	Required	60.0
payment Processor CommitmentId	String	Reference number of the commitment that was assigned by the processor.	Optional	60.0
startDate	String	Date from when the commitment is in effect. The default format is YYYY-MM-DD.	Required	60.0
transaction Day	String	Day of the month to create gift transaction in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction is created on the last day for months that don't have that many days.	Optional	60.0
transaction Interval	Integer	Transaction interval that's applicable to the incoming transaction in the commitment.	Optional	60.0
transaction Period	String	Transaction period that's applicable to the incoming transaction in the commitment. When type is pledge, this property must be set to Custom. If transactionPeriod is not provided, the default isCustom.	Required	60.0

Name	Туре	Description	Required or Optional	Available Version
type	String	Type of transaction. Possible values are: Pledge Recurring	Optional	62.0
		The default value is the Recurring.		

# Create Gift Input

Input representation of the request to create gifts, including donor details, amount, and payment method.

#### JSON example

```
"processingOptions": {
   "donorOptions": {
    "defaultUpdateLogic": "update all"
  }
 },
 "gifts": [
  {
    "amount": 150.25,
    "currencyIsoCode": "USD",
    "receivedDate": "2024-07-06",
    "donorCoverAmount": 0.25,
     "transactionStatus": "Unpaid",
     "commitmentId": "00x324303243fsfd",
    "paymentIdentifier": "1234",
    "gatewayTransactionFee": 0.75,
     "processorTransactionFee": 0.45,
     "processorReference": "cls-1247586928747",
     "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
    "lastGatewayResponseCode": "invalid cvc",
    "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's
security code or use a different card.",
     "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z",
     "campaign": {
      "id": "701y0030d0zk6t06f4"
     "outreachSourceCode": {
      "id": "0gx000d0d0d0FD",
      "sourceCode": "AnimalEmailCampaign2023"
    },
     "donor": {
      "donorType": "individual",
       "id": "0015500000W01ZiAAL",
      "firstName": "Daniel",
      "lastName": "Chavez",
       "phone": "510-432-1234",
       "email": "danielchavez@salesforce.com",
       "address": [
```

```
"street": "123 Main Street",
            "city": "Oakland",
            "state": "CA",
            "postalCode": "94610",
            "country": "US"
         }
        ],
        "accountCustomFields": [
            "fieldName": "string",
            "fieldValue": "string"
        ]
      },
      "paymentInstrument": {
        "type": "credit card",
        "accountHolderName": "Daniel Chavez",
        "expiryMonth": "10",
        "expiryYear": "2026",
        "last4": "4321",
        "cardBrand": "Diners club",
        "bankName": "chase",
        "digitalWalletProvider": "Diner's Club",
        "bankAccountHolderType": "primary",
        "bankAccountType": "checking",
        "bankAccountNumber": "123456",
        "bankCode": "HBUK",
        "gatewayName": "Gateway",
        "processorName": "centpro",
        "processorPaymentReference": "string",
        "gatewayReference": "string"
      },
      "designations": [
          "designationId": "0gd0030f0303024",
          "percent": 10,
          "amount": 150.25
       }
      ],
      "giftTransactionCustomFields": [
          "fieldName": "string",
          "fieldValue": "string"
        }
   }
 ]
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
gifts	Create Gift Request Input[]	Details of the request to create the gift.	Required	60.0
processing Options	Processing Options Details Input	Options for the donor matching process.	Optional	60.0

## Create Gift Request Input

Input representation of the data required to create a new gift. This request body accepts both standard and custom fields for donor account and gift transaction. If a standard field does not appear in the request body, you can include it in the customFields section for the relevant object.

#### JSON example

```
"gifts": [
  {
     "amount": 150.25,
     "currencyIsoCode": "USD",
     "receivedDate": "2024-07-06",
     "donorCoverAmount": 0.25,
     "transactionStatus": "Unpaid",
     "commitmentId": "00x324303243fsfd",
     "paymentIdentifier": "1234",
     "gatewayTransactionFee": 0.75,
     "processorTransactionFee": 0.45,
     "processorReference": "cls-1247586928747",
     "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
     "lastGatewayResponseCode": "invalid cvc",
    "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's
security code or use a different card.",
     "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z",
     "campaign": {
       "id": "701y0030d0zk6t06f4"
     },
     "outreachSourceCode": {
       "id": "0gx000d0d0d0FD",
       "sourceCode": "AnimalEmailCampaign2023"
     },
     "donor": {
       "donorType": "individual",
       "id": "0015500000W01ZixxL",
       "firstName": "Daniel",
       "lastName": "Chavez",
       "phone": "510-432-1234",
       "email": "example@salesforce.com",
       "address": [
         {
```

```
"street": "123 Main Street",
            "city": "Oakland",
            "state": "CA",
            "postalCode": "94610",
            "country": "US"
         }
        ],
        "accountCustomFields": [
            "fieldName": "string",
           "fieldValue": "string"
          }
        ]
      },
      "paymentInstrument": {
        "type": "credit card",
        "accountHolderName": "Daniel Chavez",
        "expiryMonth": "10",
        "expiryYear": "2026",
        "last4": "4321",
        "cardBrand": "visa",
        "bankName": "chase",
        "digitalWalletProvider": "Diner's Club",
        "bankAccountHolderType": "primary",
        "bankAccountType": "checking",
        "bankAccountNumber": "123456",
        "bankCode": "HBUK",
        "gatewayName": "Gateway",
       "processorName": "OptiSynth",
        "processorPaymentReference": "string",
        "gatewayReference": "string"
      },
      "designations": [
          "designationId": "0gd0030f0303024",
          "percent": 10,
          "amount": 150.25
       }
      ],
      "giftTransactionCustomFields": [
          "fieldName": "string",
          "fieldValue": "string"
      ]
 ]
}
```

Name	Туре	Description	Required or Optional	Available Version
accountOustanFields	Custom Field Details Input[]	Custom fields for the donor account. The accountCustomFields property aslo accepts the standard fields for the donor account.	Optional	60.0
amount	Double	Original amount of the gift transaction.	Required	60.0
campaign	Campaign Details Input	Campaign that's associated with the gift transaction.	Optional	60.0
commitmentId	String	Gift commitment ID that's associated with the gift transaction.	Optional	60.0
currency IsoCode	String	ISO code of the currency.	Optional	60.0
designations	Designation Details Input[]	Designations that are associated with the gift transaction.	Optional	60.0
donor	Donor Details Input	Donor details that are associated with the gift transaction.	Required	60.0
donorCover Amount	Double	Amount that the donor added to their gift to cover fees.	Optional	60.0
gateway Reference	String	Reference of the transaction to which the gateway is assigned.	Optional	60.0
gateway TransactionFee	Double	Transaction fees charged by the gateway.	Optional	60.0
giftTransaction CustomFields	Custom Field Details Input[]	Custom fields for the gift transaction. The giftTransactionCustomFields property also accepts the standard fields for the gift transaction.	Optional	60.0
lastGateway ErrorMessage	String	Most recent error message received by the gateway.	Optional	60.0
lastGateway ProcessedDate Time	String	Last attempt made by the gateway.	Optional	60.0
lastGateway ResponseCode	String	Most recent response code that was received by the gateway.	Optional	60.0
outreach SourceCode	Outreach Source Code Details Input	Outreach source code that's associated with the gift transaction.	Optional	60.0
payment Identifier	String	Unique ID for the payment transaction.	Optional	60.0

Name	Туре	Description	Required or Optional	Available Version
payment Instrument	Payment Instrument Details Input	Payment instrument used for the gift transaction.	Required	60.0
processor Reference	String	Reference of the transaction to which the payment processor is assigned.	Optional	60.0
processor Transaction Fee	Double	Transaction fees charged by the processor.	Optional	60.0
receivedDate	String	Date when the donor completed the gift transaction.	Required	60.0
transaction Status	String	Status of the gift transaction.	Required	60.0

# Custom Field Details Input

Input representation of the custom fields for the request to incorporate custom attributes into records.

You can include the standard fields such as Description, EffectiveStartDate, and more in this request body. To include the standard fields in the request body, specify the API name of the standard field as the value of the fieldName property, and provide the value for the standard field in the fieldValue property.

## JSON example

This example shows a sample request that includes a standard field.

```
{
  "fieldName": "effectiveStartDate",
  "fieldValue": "2024-05-06"
}
```

This example shows a sample request that includes a custom field.

```
{
  "fieldName": "TShirtSize__c",
  "fieldValue": "Medium"
}
```

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
fieldName	String	API name of the custom or standard field.	Optional	60.0
fieldValue	Object	Value of the custom or standard field.	Optional	60.0

# **Designation Details Input**

Input representation of the designations that are associated with the request.

## JSON example

```
{
  "designations": {
    "id": "0gd0030f0303xx4",
    "amount": 150.25,
    "percent": 10
  }
}
```

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
amount	Double	Transaction amount that's allocated to the designation, which is for gifts only.	Optional	60.0
id	String	ID of the gift designation. This ID can also be passed as an externalID in the format given below:	Optional	60.0
		<pre>{     "externalId": {         "fieldName": "<external_id_field_name>",         "fieldValue": "<external_id_field_value>" },</external_id_field_value></external_id_field_name></pre>		
percent	Double	Percentage of the transaction or commitment amount that's allocated to the designation.	Optional	60.0

# **Donor Details Input**

Input representation of the donor details that's associated with the gift transaction.

## JSON example

```
"city": "Oakland",
    "state": "CA",
    "postalCode": "94610",
    "country": "US"
}

l,
    "accountCustomFields": [
    {
        "fieldName": "string",
        "fieldValue": "string"
}
```

Name	Туре	Description	Required or Optional	Available Version
account CustomFields	Custom Field Details Input[]	Account standard and custom fields of the donor.	Optional	60.0
address	Address Details Input[]	Address details of the donor.	Optional	60.0
donorType	String	Type of the donor.  You can't use the organizationName when the donorType is set to Individual. Similarly, don't use firstName or lastName properties when the donorType is Organizational.	Required	60.0
email	String	Email address of the donor.	Optional	60.0
firstName	String	First name of the donor.	Required	60.0
id	String	ID of the gift designation. This ID can also be passed as an external ID in the format given below:  {	Optional	60.0
lastName	String	Last name of the donor.	Required	60.0

Name	Туре	Description	Required or Optional	Available Version
organization Name	String	Organization name of the donor.	Required	60.0
phone	String	Phone number of the donor.	Optional	60.0

# **Donor Options Details Input**

Input representation of the available donor processing options that includes targeted update logic for the donor-related components of the commitment transaction.

## JSON example

```
"donorOptions": {
    "defaultUpdateLogic": "update_all"
}
```

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
default UpdateLogic	String	Default update value for the donor updates. Valid values are:	Optional	60.0
		<ul> <li>update_all- If an existing donor is matched (whether by a record ID, external ID, or Duplicate Rules), any donor properties that are provided are updated on the matched donor's account, including any custom account field mappings.</li> </ul>		
		<ul> <li>no_update- If an existing donor is matched (whether by a record ID, external ID, or Duplicate Rules), none of the donor properties that are provided are updated on the matched donor's account, including any custom account field mappings.</li> </ul>		

# Outreach Source Code Details Input

Input representation of the outreach source code that's associated with the request.

## JSON example

```
{
  "id": "0gx000d0d0d0FD",
  "sourceCode": "AnimalEmailCampaign2023"
}
```

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
id	String	ID of the outreach source code.	Optional	60.0
sourceCode	String	Unique code associated with the outreach source.	Optional	60.0

# Payment Instrument Details Input

Input representation of the payment instrument used for the request.

## JSON example

```
"type": "Credit Card",
"accountHolderName": "Diana Gómez",
"expiryMonth": "10",
"expiryYear": "2026",
"last4": "4321",
"cardBrand": "Diner's Club",
"bankName": "chase",
"digitalWalletProvider": "",
"bankAccountHolderType": "",
"bankAccountType": "",
"bankAccountNumber": "",
"bankCode": "",
"gatewayName": "Gateway",
"processorName": "Centpro",
"processorPaymentReference": "string",
"gatewayReference": "string"
```

Name	Туре	Description	Required or Optional	Available Version
account HolderName	String	Name of the payment instrument holder.	Optional	60.0
bankAccount HolderType	String	Specifies if the bank account holder is an individual or a company.	Optional	60.0
bankAccount Number	String	Bank account number associated with the payment instrument.	Optional	60.0
bankAccount Type	String	Type of the bank account.	Optional	60.0
bankCode	String	Code of the bank that's associated with the bank account.	Optional	60.0

Name	Туре	Description	Required or Optional	Available Version
bankName	String	Bank name that's associated with the bank account.	Optional	60.0
cardBrand	String	Brand, network, or issuer of the credit card.	Optional	60.0
digital WalletProvider	String	Provider of the digital wallet.	Optional	60.0
expiryMonth	String	Expiration month if the payment method is credit card.	Optional	60.0
expiryYear	String	Expiration year if the payment method is credit card.	Optional	60.0
gatewayName	String	Name of the payment gateway.	Optional	60.0
gateway Reference	String	Reference number of the gateway for this payment instrument.	Optional	60.0
last4	String	Last four digits of the account number for the payment method.	Optional	60.0
processorName	String	Name of the payment processor.	Optional	60.0
processor Payment Reference	String	Reference of the payment processor that's associated with the payment instrument.	Optional	60.0
type	String	Type of the payment instrument used for the request.	Required	60.0

# **Processing Options Details Input**

Input representation of the donor processing options.

## JSON example

```
{
   "processingOptions": {
     "donorOptions": {
        "defaultUpdateLogic": "update_all"
     }
   }
}
```

Name	Туре	Description	Required or Optional	Available Version
donorOptions	Donor Options Details Input	Donor processing options to create gift commitments.	Optional	60.0

# **Transaction Details Input**

Input representation of the transaction details.

## JSON example

```
"amount": 150.25,
   "receivedDate": "2024-07-06",
   "donorCoverAmount": 0.25,
   "transactionStatus": "Unpaid",
   "gatewayTransactionFee": 0.75,
   "processorTransactionFee": 0.45,
   "processorReference": "cls-1247586928747",
   "gatewayReference": "102656693ac3ca6e0cdafbfe89ab99",
   "lastGatewayResponseCode": "invalid_cvc",
   "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's security code or use a different card.",
   "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
}
```

Name	Туре	Description	Required or Optional	Available Version
amount	Double	Original amount of the gift transaction.	Optional	60.0
donor CoverAmount	Double	Amount that the donor added to their gift to cover fees.	Optional	60.0
gateway Reference	String	Reference of the transaction to which the gateway is assigned.	Optional	60.0
gateway TransactionFee	Double	Transaction fees charged by the gateway.	Optional	60.0
lastGateway ErrorMessage	String	Most recent error message received by the gateway.	Optional	60.0
latGtoayProesseDteTne	e String	Last attempt made by the gateway.	Optional	60.0
lastGateway ResponseCode	String	Most recent response code that was received by the gateway.	Optional	60.0
processor Reference	String	Reference of the transaction to which the payment processor is assigned.	Optional	60.0
processor TransactionFee	Double	Transaction fees charged by the processor.	Optional	60.0
receivedDate	String	Date when the donor completed the gift transaction.	Optional	60.0
transaction Status	String	Transaction status of the gift.	Optional	60.0

# Transaction Payment Update Request Input

Input representation of the details of the gateway and processor metadata to update the transaction payment. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

## JSON example

```
"giftTransactionId": "6TR5500000WO1ZIxxE",
   "transactionStatus": "Unpaid",
   "processorReference": "string",
   "gatewayReference": "string",
   "lastGatewayResponseCode": "invalid_cvc",
   "lastGatewayErrorMessage": "The card's security code is invalid. Check the card's security code or use a different card.",
   "lastGatewayProcessedDateTime": "2023-07-06T21:57:51Z"
}
```

Name	Туре	Description	Required or Optional	Available Version
gateway Reference	String	Reference of the transaction to which the gateway is assigned.	Optional	60.0
gift TransactionId	String	ID of the gift transaction record. This ID can also be passed as an externalID in the format given below:	Required	60.0
		<pre>{     "externalId": {         "fieldName":         "<external field="" id="" name="">",</external></pre>		
		"fieldValue":		
		" <external_id_field_value>"</external_id_field_value>		
		,		
lastGateway ErrorMessage	String	Most recent error message received by the gateway.	Optional	60.0
lastGateway Processed DateTime	String	Last attempt made by the gateway.	Optional	60.0
lastGateway ResponseCode	String	Most recent response code that was received by the gateway.	Optional	60.0
processor Reference	String	Reference of the transaction to which the payment processor is assigned.	Optional	60.0

Name	Туре	Description	Required or Optional	Available Version
transaction Status	String	Gift status of the transaction.	Required	60.0

## Transaction Payment Updates Input

Input representation of the gateway and processor metadata to update the transaction payment. If you include any other standard or custom fields in the request body beyond the specified properties, an error is shown.

## JSON example

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
updates	Transaction Payment Update Request Input[]	Contains the details of the request to update the transaction payment.	Required	60.0

## **Update Commitment Input**

Input representation of the request to update a commitment.

## JSON example

```
"amount": 150.25,
"type": "pledge",
"transactionInterval": 3,
"transactionDay": "5",
"startDate": "2024-07-06",
"endDate": "2024-07-06",
"campaign": {
    "id": "701y0030d0zk6t06f4"
},
```

```
"outreachSourceCode": {
 "id": "0gx000d0d0d0fD",
 "sourceCode": "AnimalEmailCampaign2023"
"donor": {
 "donorType": "individual",
  "organizationName": "ABC Inc.",
  "firstName": "Daniel",
  "lastName": "Chavez",
  "phone": "510-434-8920",
  "email": "d.chavez@salesforce.com",
  "address": [
     "street": "123 Main Street",
     "city": "Oakland",
     "state": "CA",
     "postalCode": "94610",
      "country": "US"
  ],
  "accountCustomFields": [
     "fieldName": "string",
     "fieldValue": "string"
  ],
  "paymentInstrument": {
    "type": "Credit Card",
    "accountHolderName": "Daniel Chavez",
    "expiryMonth": "10",
    "expiryYear": "2026",
    "last4": "4321",
    "cardBrand": "Diner's Club",
    "bankName": "chase",
    "digitalWalletProvider": "EProvider",
    "bankAccountHolderType": "primary",
    "bankAccountType": "checking",
    "bankAccountNumber": "123456",
    "bankCode": "HBUK",
    "gatewayName": "Gateway",
    "processorName": "Centpro",
    "processorPaymentReference": "string",
    "gatewayReference": "string"
  "giftCommitmentCustomFields": [
      "fieldName": "string",
     "fieldValue": "string"
  "giftCommitmentScheduleCustomFields": [
     "fieldName": "string",
     "fieldValue": "string"
```

```
}
1
}
}
```

Name	Туре	Description	Required or Optional	Available Version
amount	Double	Gift amount of each transaction associated with the gift commitment schedule.	Required	60.0
campaign	Campaign Details	Campaign that's associated with the gift commitment.	Optional	60.0
currency IsoCode	String	Currency ISO code of the gift commitment.	Optional	60.0
donorId	Donor Details Input	Person, household, or organization account associated with the commitment.	Optional	60.0
endDate	String	End date of the new schedule for this gift commitment. The format is YYYY-MM-DD.	Optional	60.0
giftCommitment CustomFields	Custom Field Details[]	Custom fields of the gift commitment.	Optional	60.0
giftCommitment Schedule CustomFields	Custom Field Details[]	Custom fields of the gift commitment schedule.	Optional	60.0
outreach SourceCode	Outreach Source Code Details	Outreach source code that's associated with the campaign for the gift commitment.	Optional	60.0
payment Instrument	Payment Instrument Details	Payment instrument that's used to complete the transaction.	Required	60.0
startDate	String	Start date of the new schedule for this gift commitment. The format is YYYY-MM-DD.	Required	60.0
transaction Day	String	Specifies the day of the month to create gift transactions in the future for a monthly transaction period. If you select the day as 29 or 30, the gift transaction is created on the last day for the months that don't have that many days.	Optional	60.0
transaction Interval	Integer	Transaction interval that's applicable to an incoming transaction in the commitment.	Optional	60.0

Name	Туре	Description	Required or Optional	Available Version
transaction Period	String	Transaction period that's applicable to the incoming transaction in the commitment. When type is pledge, this property must be set to Custom. If transactionPeriod is not provided, the default isCustom.	Required	60.0
type	String	Type of transaction. Possible values are:  Pledge Recurring The default value is the Recurring.	Optional	62.0

# **Response Bodies**

Learn more about the available Fundraising API response bodies.

## Commitment Payment Updates

Output representation of the request to update the commitment payment for a fundraising commitment.

## **Commitment Payment Updates**

Output representation of the updates for the commitment payment.

#### Commitment Payment Updates Response Link

Output representation of the links to the response object for the commitment payment updates.

#### **Create Commitment**

Output representation of the fundraising commitment request that contains the commitment ID and associated links.

## Create Commitment Response Details

Output representation of the create commitment result with success status code, error, if any, and associated object links.

## Create Commitment Response Link

Output representation of the links to the response object.

#### Create Gift

Output representation of the details of the created gift transaction response.

## Create Gift Response Details

Output representation of the request details to create the gift.

## Create Gift Response Link

Output representation of the links to the response object.

#### **Error Details**

Output representation of the errors encountered during an API request.

#### Link Details

Output representation of the link details for the response object.

## **Transaction Payment Updates**

Output representation of the transaction payment updates.

## Transaction Payment Updates Response

Output representation of the updates for the transaction payment.

## Transaction Payment Updates Response Link

Output representation of the links to the response object for the transaction payment updates.

#### **Update Commitment**

Output representation of the update commitment request that contains the status, errors if any, and the links to objects after you update a gift commitment.

#### **Update Commitment Response Link**

Output representation of the links to the response object for the commitment updates.

## **Commitment Payment Updates**

Output representation of the request to update the commitment payment for a fundraising commitment.

```
"successes": 0,
"failures": 0,
"notProcessed": 0,
"details": [
    "success": true,
    "errors": [
        "field": "string",
        "message": "string"
    ],
    "links": {
      "giftcommitment": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "paymentinstrument": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      }
    }
  }
]
```

Property Name	Туре	Description	Filter Group and Version	Available Version
details	Commitment Payment Updates[] on page 196	Contains the response of the commitment payment update.	Small, 60.0	60.0

Property Name	Туре	Description	Filter Group and Version	Available Version
failures	Integer	Number of gift commitments that failed to be updated.	Small, 60.0	60.0
notProcessed	Integer	Number of gift commitments that weren't processed.	Small, 60.0	60.0
successes	Integer	Number of gift commitments that were updated.	Small, 60.0	60.0

# **Commitment Payment Updates**

Output representation of the updates for the commitment payment.

```
"details": [
    {
      "success": true,
      "errors": [
          "field": "string",
          "message": "string"
        }
      ],
      "links": {
        "giftcommitment": {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        "paymentinstrument": {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        }
      }
    }
  ]
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
errors	Error Details[]	Error message if a process failed.	Small, 60.0	60.0
links	Commitment Payment Updates Response Link	Links to the response object.	Small, 60.0	60.0
success	Boolean	Indicates whether the request was processed successfully (true) or not (false).	Small, 60.0	60.0

## Commitment Payment Updates Response Link

Output representation of the links to the response object for the commitment payment updates.

## Sample Response

```
"links": {
    "giftcommitment": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
    },
    "paymentinstrument": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
    }
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
gift commitment	Link Details	Link to the gift commitment response.	Small, 60.0	60.0
payment instrument	Link Details	Link to the first payment instrument response.	Small, 60.0	60.0

## **Create Commitment**

Output representation of the fundraising commitment request that contains the commitment ID and associated links.

```
"successes": 0,
"failures": 0,
"notProcessed": 0,
"details": [
  {
    "success": true,
    "errors": [
        "field": "string",
        "message": "string"
      }
    ],
    "links": {
      "giftcommitment": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "giftcommitmentschedule": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
```

```
} ,
      "giftdefaultdesignation": [
        {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        }
      ],
      "gifttransaction": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "paymentinstrument": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "account": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      }
    }
  }
]
```

Property Name	Туре	Description	Filter Group and Version	Available Version
details	Create Commitment Response Details[]	Contains the response to the create commitment request.	Small, 60.0	60.0
failures	Integer	Number of commitments that failed to be created.	Small, 60.0	60.0
notProcessed	Integer	Number of commitments that weren't processed.	Small, 60.0	60.0
successes	Integer	Number of successful commitments that were created.	Small, 60.0	60.0

## Create Commitment Response Details

Output representation of the create commitment result with success status code, error, if any, and associated object links.

```
],
    "links": {
      "giftcommitment": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      "giftcommitmentschedule": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "giftdefaultdesignation": [
        {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        }
      ],
      "gifttransaction": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "paymentinstrument": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "account": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
    }
  }
]
```

Property Name	Туре	Description	Filter Group and Version	Available Version
errors	Error Details[]	Details of the error if the request failed to process.	Small, 60.0	60.0
links	Create Commitment Response Link	Links to the response object.	Small, 60.0	60.0
success	Boolean	Indicates whether the request was processed successfully (true) or not (false).	Small, 60.0	60.0

# Create Commitment Response Link

Output representation of the links to the response object.

```
{
    "links": {
```

```
"giftcommitment": {
      "href": "/services/data/vXX.X/sobjects/sObject/...",
      "id": "string"
    },
    "giftcommitmentschedule": {
      "href": "/services/data/vXX.X/sobjects/sObject/...",
      "id": "string"
    "giftdefaultdesignation": [
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      }
    ],
    "gifttransaction": {
      "href": "/services/data/vXX.X/sobjects/sObject/...",
      "id": "string"
    },
    "paymentinstrument": {
      "href": "/services/data/vXX.X/sobjects/sObject/...",
      "id": "string"
    },
    "account": {
      "href": "/services/data/vXX.X/sobjects/sObject/...",
      "id": "string"
   }
  }
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
account	Link Details	Link to the donor account.	Small, 60.0	60.0
giftcommitment	Link Details	Link to the gift commitment response.	Small, 60.0	60.0
giftcommitment schedule	Link Details	Link to the gift commitment schedule response.	Small, 60.0	60.0
giftdefault designation	Link Details[]	Link to the gift default designation response.	Small, 60.0	60.0
gift transaction	Link Details	Link to the first gift transaction response.	Small, 60.0	60.0
payment instrument	Link Details	Link to the first payment instrument response.	Small, 60.0	60.0

## **Create Gift**

Output representation of the details of the created gift transaction response.

```
"successes": 0,
  "failures": 0,
  "notProcessed": 0,
  "details": [
    {
      "success": true,
      "errors": [
       {
          "field": "string",
          "message": "string"
        }
      ],
      "links": {
        "account": {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        },
        "gifttransaction": {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        },
        "giftcommitment": {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        "paymentinstrument": {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        },
        "gifttransactiondesignation": [
            "href": "/services/data/vXX.X/sobjects/sObject/...",
            "id": "string"
          }
        ],
        "campaign": {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        "outreachsourcecode": {
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        }
      }
    }
 ]
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
details	Create Gift Response Details[]	Contains the details of the gift response.	Small, 60.0	60.0
failures	Integer	Number of transactions that failed to be created.	Small, 60.0	60.0
notProcessed	Integer	Number of transactions that weren't processed.	Small, 60.0	60.0
successes	Integer	Number of transactions that were created.	Small, 60.0	60.0

## Create Gift Response Details

Output representation of the request details to create the gift.

```
"details": [
 {
    "success": true,
    "errors": [
        "field": "string",
        "message": "string"
      }
    ],
    "links": {
     "account": {
       "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "gifttransaction": {
       "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "giftcommitment": {
       "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      } ,
      "paymentinstrument": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      },
      "gifttransactiondesignation": [
          "href": "/services/data/vXX.X/sobjects/sObject/...",
          "id": "string"
        }
      ],
      "campaign": {
```

```
"href": "/services/data/vXX.X/sobjects/sObject/...",
    "id": "string"
},
    "outreachsourcecode": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
     }
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
errors	Error Details[]	Details of the error if the request failed to process.	Small, 60.0	60.0
links	Create Gift Response Link	Links to the response object.	Small, 60.0	60.0
success	Boolean	Indicates whether the request was processed successfully (true) or not (false).	Small, 60.0	60.0

## Create Gift Response Link

Output representation of the links to the response object.

```
"links": {
 "account": {
   "href": "/services/data/vXX.X/sobjects/sObject/...",
   "id": "string"
 },
  "gifttransaction": {
   "href": "/services/data/vXX.X/sobjects/sObject/...",
   "id": "string"
 },
  "giftcommitment": {
   "href": "/services/data/vXX.X/sobjects/sObject/...",
   "id": "string"
  "paymentinstrument": {
   "href": "/services/data/vXX.X/sobjects/sObject/...",
   "id": "string"
 },
  "gifttransactiondesignation": [
     "href": "/services/data/vXX.X/sobjects/sObject/...",
     "id": "string"
```

```
"campaign": {
    "href": "/services/data/vXX.X/sobjects/sObject/...",
    "id": "string"
},
    "outreachsourcecode": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
}
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
account	Link Details	Link to the donor account.	Small, 60.0	60.0
gift commitment	Link Details	Link to the gift commitment response.	Small, 60.0	60.0
gift transaction	Link Details	Link to the gift transaction response.	Small, 60.0	60.0
gifttransaction designation	Link Details	Link to the gift transaction designations.	Small, 60.0	60.0
payment instrument	Link Details	Link to the payment instrument response.	Small, 60.0	60.0

## **Error Details**

Output representation of the errors encountered during an API request.

## **Sample Response**

```
"errors": {
    "field": "string",
    "message": "string"
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
field	String	Name of the field that has errors.	Small, 60.0	60.0
message	String	Error message for the failed process.	Small, 60.0	60.0

## Link Details

Output representation of the link details for the response object.

## Sample Response

```
{
  "href": "/services/data/vXX.X/sobjects/sObject/...",
  "id": "string"
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
href	String	Object link that provides the direct access to the resource.	Small, 60.0	60.0
id	String	Salesforce ID of the linked resource.	Small, 60.0	60.0

## **Transaction Payment Updates**

Output representation of the transaction payment updates.

```
"successes": 0,
"failures": 0,
"notProcessed": 0,
"details": [
    "success": true,
    "errors": [
     {
        "field": "string",
        "message": "string"
      }
    ],
    "links": {
      "gifttransaction": {
        "href": "/services/data/vXX.X/sobjects/sObject/...",
        "id": "string"
      }
]
```

Property Name	Туре	Description	Filter Group and Version	Available Version
details	Transaction Payment Updates Response[]	Payment update response of the transaction.	Small, 60.0	60.0
failures	Integer	Number of gift transactions that failed to update.	Small, 60.0	60.0

Property Name	Туре	Description	Filter Group and Version	Available Version
notProcessed	Integer	Number of gift transactions that weren't processed.	Small, 60.0	60.0
successes	Integer	Number of gift transactions that were updated.	Small, 60.0	60.0

## **Transaction Payment Updates Response**

Output representation of the updates for the transaction payment.

## **Sample Response**

Property Name	Туре	Description	Filter Group and Version	Available Version
errors	Error Details[]	Error message if a process failed.	Small, 60.0	60.0
links	Transaction Payment Updates Response Link	Links to the response object.	Small, 60.0	60.0
success	Boolean	Indicates whether a request was processed successfully (true) or not (false).	Small, 60.0	60.0

# Transaction Payment Updates Response Link

Output representation of the links to the response object for the transaction payment updates.

## Sample Response

```
{
  "gifttransaction": {
    "href": "/services/data/vXX.X/sobjects/sObject/...",
    "id": "string"
  }
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
gift transaction	Link Details	Link to the gift transaction details.	Small, 60.0	60.0

# **Update Commitment**

Output representation of the update commitment request that contains the status, errors if any, and the links to objects after you update a gift commitment.

Property Name	Туре	Description	Filter Group and Version	Available Version
errors	Error Details[]	Error message if the process failed.	Small, 60.0	60.0
links	Update Commitment Response Link	Links to the response object.	Small, 60.0	60.0

Property Name	Туре	Description	Filter Group and Version	Available Version
success	Boolean	Indicates whether the request was processed successfully (true) or not (false).	Small, 60.0	60.0

## Update Commitment Response Link

Output representation of the links to the response object for the commitment updates.

## Sample Response

```
"giftcommitment": {
    "href": "/services/data/vXX.X/sobjects/sObject/...",
    "id": "string"
},
"giftcommitmentschedule": {
    "href": "/services/data/vXX.X/sobjects/sObject/...",
    "id": "string"
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
gift commitment	Link Details	Link to the updated gift commitment details.	Small, 60.0	60.0
giftcommitment schedule	Link Details	Link to the schedule associated with the updated gift commitment.	Small, 60.0	60.0

# Fundraising Invocable Actions

Use actions to add more functionality to your applications. Choose from standard actions, such as processing gift entries, update processed gift entries, manage gift default designations, and manage gift transaction designations.

To know more about invocable actions, see Actions Developer Guide and REST API Developer Guide.

## Close Gift Commitment Action

Updates the status of a gift commitment to closed and updates the status for each of its unpaid and failed gift transactions.

## Manage Custom Gift Commitment Schedules Action

Creates or updates up to 15 custom gift commitment schedule records and their associated gift transaction records.

## Manage Gift Default Designations Action

Creates and manages Gift Default Designation records for a gift entry associated with a campaign, opportunity, or gift commitment.

## Manage Gift Transaction Designations Action

Creates and manages Gift Transaction Designation records for a gift transaction.

Fundraising Close Gift Commitment Action

### Manage Recurring Gift Commitment Schedule Action

Creates or updates a recurring type of gift commitment schedule record and creates the first upcoming gift commitment transaction record.

#### Process Gift Entries Action

Processes, singly or as part of a batch, a specified gift entry ID, creating related donor, gift transaction, gift transaction designation, and gift soft credit records. You may also test gift entry processing to check for errors before creating related records.

#### Pause Gift Commitment Schedule Action

Pauses a gift commitment schedule for a specified period of time.

#### **Process Gift Commitment Action**

Updates the status and other relevant fields for a gift commitment based on the statuses of the associated gift transactions and the current gift commitment schedule.

### Resume Gift Commitment Schedule Action

Resumes a paused gift commitment schedule on a specified date.

### **Update Processed Gift Entries Action**

Updates the status of a specified gift entry record that is already processed. If the processing fails, the failure reason is updated.

## Close Gift Commitment Action

Updates the status of a gift commitment to closed and updates the status for each of its unpaid and failed gift transactions.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

## Supported REST HTTP Methods

### URI

/services/data/v**XX.X**/actions/standard/closeGiftCommitment

### **Formats**

**JSON** 

#### **HTTP Methods**

POST

#### Authentication

Authorization: Bearer token

# Inputs

Input	Details
giftCommitmentId	<b>Type</b> String
	Description
	Required.
	The ID of the gift commitment record to be closed.

## **Outputs**

None.

## Example

Here's a request for the Close Gift Commitment action.

```
{
  "inputs": [
      {
          "giftCommitmentId": "6gcNA000000YshCYAS"
      }
      }
}
```

Here's a response for the Close Gift Commitment action.

```
[
    "actionName": "closeGiftCommitment",
    "errors": null,
    "isSuccess": true,
    "outputValues": null,
    "version": 1
}
```

# Manage Custom Gift Commitment Schedules Action

Creates or updates up to 15 custom gift commitment schedule records and their associated gift transaction records.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

# Supported REST HTTP Methods

URI

/services/data/vXX.X/actions/standard/manageCustomGiftCmtSchds

### **Formats**

**JSON** 

### **HTTP Methods**

POST

#### Authentication

Authorization: Bearer token

## Inputs

Input	Details
giftCommitmentSchedules	<b>Type</b> sObject
	<b>Description</b> Required.
	A collection of gift commitment schedule records to be created or updated.

## Outputs

Input	Details
giftCommitmentScheduleList	<b>Type</b> String
	<b>Description</b> A comma-delimited list of gift commitment schedule IDs records that the action created or updated.

# Example

Here's a request for the Manage Custom Gift Commitment Schedules action.

```
"inputs": [
      "giftCommitmentSchedules": [
          "StartDate": "2023-08-26",
          "PaymentMethod": "Check",
          "Id": "6csNA000000hbx8YAA",
          "EndDate": "2023-08-28"
        },
          "StartDate": "2023-08-29",
          "PaymentMethod": "Check",
          "Id": "6csNA000000hby4YAA",
          "EndDate": "2023-08-30"
        }
      ]
    }
 ]
}
```

Here's a response for the Manage Custom Gift Commitment Schedules action.

# Manage Gift Default Designations Action

Creates and manages Gift Default Designation records for a gift entry associated with a campaign, opportunity, or gift commitment.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

## Supported REST HTTP Methods

URI

/services/data/vXX.X/actions/standard/manageGiftDefaultDesignations

#### **Formats**

JSON, XML

#### **HTTP Methods**

**POST** 

### Authentication

Authorization: Bearer token

## Inputs

Input	Details
giftDefaultDesignationIds	<b>Type</b> sObject
	<b>Description</b> Required.
	A collection of Gift Default Designation record IDs that are to be modified or deleted.
parentRecordId	Type ID

Input Details

### Description

Required.

The ID of the parent record like a campaign, opportunity, or gift commitment associated with the gift default designation IDs in giftDefaultDesignationIds.

## Outputs

None.

## Example

Here's a request for the Manage Gift Default Designations action.

Here's a response for the Manage Gift Default Designations action.

```
[
    "actionName": "manageGiftDefaultDesignations",
    "errors": null,
    "isSuccess": true,
    "outputValues": null,
    "version": 1
}
```

# Manage Gift Transaction Designations Action

Creates and manages Gift Transaction Designation records for a gift transaction.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

# Supported REST HTTP Methods

URI

/services/data/v**XX.X**/actions/standard/manageGiftTrxnDesignations

**Formats** 

JSON, XML

**HTTP Methods** 

POST

Authentication

Authorization: Bearer token

## Inputs

Input	Details
giftTransactionDesignations	<b>Type</b> sObject
	<b>Description</b> Required.
	A collection of Gift Transaction Designation record IDs that are to be modified or deleted.
recordId	Type ID
	<b>Description</b> Required.
	The record for which the Gift Transaction Designation record is created. For example, Gift Transaction.

# Outputs

None.

# Example

Here's a request for the Manage Gift Transaction Designations action.

```
}
],
"recordId": "6trRM00000003PJYAY"
}
```

Here's a response for the Manage Gift Transaction Designations action.

```
[
    "actionName": "manageGiftTrxnDesignations",
    "errors": null,
    "isSuccess": true,
    "outputValues": null,
    "version": 1
}
```

# Manage Recurring Gift Commitment Schedule Action

Creates or updates a recurring type of gift commitment schedule record and creates the first upcoming gift commitment transaction record.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

## Supported REST HTTP Methods

#### URI

/services/data/v**XX.X**/actions/standard/manageRcrGiftCmtSchd

#### **Formats**

JSON, XML

### **HTTP Methods**

**POST** 

#### Authentication

Authorization: Bearer token

## Inputs

Input	Details
effectiveFromDate	<b>Type</b> Date
	<b>Description</b> The date from when the updates to the gift commitment schedule are effective. Only applicable in a schedule update scenario.
effectiveToDate	<b>Type</b> Date

### Input Details

### Description

The date until when the updates to the gift commitment schedule are effective. Only applicable in a schedule update scenario.

giftCommitmentSchedule

## Туре

sObject

### Description

Required.

The gift commitment schedule record to be created or updated.

## Outputs

### Input

giftCammitmentScheduleIdsList

#### Type

**Details** 

Date

#### Description

A comma-delimited list of gift commitment schedule IDs for schedules that were created or updated.

# Example

Here's a request for the Manage Recurring Gift Commitment Schedule action.

Here's a response for the Manage Recurring Gift Commitment Schedule action.

Fundraising Process Gift Entries Action

```
"isSuccess": true,
  "outputValues": {
     "giftCommitmentScheduleIdsList": [
         "6csNA000000hbx8YAA",
         "6csNA000000hby4YAA"
     ]
    },
    "version": 1
}
```

## **Process Gift Entries Action**

Processes, singly or as part of a batch, a specified gift entry ID, creating related donor, gift transaction, gift transaction designation, and gift soft credit records. You may also test gift entry processing to check for errors before creating related records.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

## Supported REST HTTP Methods

URI

/services/data/v**XX.X**/actions/standard/processGiftEntries

#### **Formats**

JSON, XML

### **HTTP Methods**

POST

#### Authentication

Authorization: Bearer token

# Inputs

Input	Details
giftEntryId	Type ID
	<b>Description</b> Required.
	The ID of the gift entry record to be processed.
isDryRun	<b>Type</b> Boolean
	<b>Description</b> Indicates whether to run the action without creating or updating records to determine if there are any errors (true) or actual processing (false).
	The default value is false.

Fundraising Process Gift Entries Action

# Outputs

Output	Details
donorId	Туре
	ID
	Description
	The ID of the person, household, or organization account that's associated with the gift entry.
giftEntryId	Туре
	ID
	Description
	The ID of the gift entry record that is processed.
giftProcessingErrorDetails	Туре
	String
	Description
	The error details when the gift processing status is Failure.
giftProcessingStatus	Туре
	String
	Description
	The processing status of the gift entry.
	Valid values are:
	• Failure
	• New
	• Success
giftTransactionId	Туре
	ID
	Description
	The ID of the gift transaction that's associated with the gift entry.

# Example

Here's a request for the Process Gift Entries action for processing a gift entry.

Here's a response for the Process Gift Entries action for processing a gift entry.

```
"actionName": "processGiftEntries",
   "errors": null,
   "isSuccess": true,
   "outputValues": {
        "giftProcessingStatus": "SUCCESS",
        "giftEntryId": "6geRM0000000GdYAI",
        "giftTransactionId": "6trRM0000003PJ",
        "giftProcessingErrorDetails": null,
        "donorId": "001RM000005ewDDYAY"
     },
     "version": 1
}
```

Here's a request for the Process Gift Entries action for a dry run of gift entry processing.

Here's a response for the Process Gift Entries action for a dry run of gift entry processing.

## Pause Gift Commitment Schedule Action

Pauses a gift commitment schedule for a specified period of time.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

# Supported REST HTTP Methods

URI

 $/ \texttt{services/data/v} \textbf{\textit{XX}}.\textbf{\textit{X}}/ \texttt{actions/standard/pauseGiftCommitmentSchedule}$ 

**Formats** 

JSON, XML

**HTTP Methods** 

POST

Authentication

Authorization: Bearer token

# Inputs

Input	Details
endDate	Туре
	Date
	Description
	The date to resume the gift commitment schedule.
giftCommitmentScheduleId	Туре
	String
	Description
	Required.
	The ID of the gift commitment schedule record to be paused.
startDate	Туре
	Date
	Description
	The date to pause the gift commitment schedule.
updateReason	Туре
	String
	Description
	The reason the gift commitment schedule is to be paused.

# Outputs

Input	Details
giftCarmitmentScheduleIdsList	<b>Type</b> String

Process Gift Commitment Action

### Description

A comma-delimited list of gift commitment schedule IDs for schedules that were created or updated.

## Example

Here's a request for the Pause Gift Commitment Schedule action.

Here's a response for the Pause Gift Commitment Schedule action.

## **Process Gift Commitment Action**

Updates the status and other relevant fields for a gift commitment based on the statuses of the associated gift transactions and the current gift commitment schedule.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

# Supported REST HTTP Methods

URI

/services/data/v**XX.X**/actions/standard/processGiftCommitment

#### **Formats**

JSON, XML

### **HTTP Methods**

POST

### Authentication

Authorization: Bearer token

## Inputs

Input	Details
giftCommitmentId	<b>Type</b> String
	<b>Description</b> Required.
	The ID of the gift commitment record to be processed.

## Outputs

Input	Details
giftCammitmentProcessingStatus	<b>Type</b> String
	<b>Description</b> The status of the gift commitment record after it is processed.

# Example

Here's a request for the Process Gift Commitment action.

```
{
  "inputs": [
     {
        "giftCommitmentId": "6gcNA000000PeKhYAK"
     }
     ]
}
```

Here's a response for the Process Gift Commitment action.

```
[
    "actionName": "processGiftCommitment",
    "errors": null,
    "isSuccess": true,
    "outputValues": null,
    "version": 1
}
```

# Resume Gift Commitment Schedule Action

Resumes a paused gift commitment schedule on a specified date.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

# Supported REST HTTP Methods

URI

/services/data/v**XX.X**/actions/standard/resumeGiftCommitmentSchedule

**Formats** 

JSON, XML

**HTTP Methods** 

POST

Authentication

Authorization: Bearer token

## Inputs

Input	Details
giftCommitmentScheduleId	<b>Type</b> String
	<b>Description</b> Required.
	The ID of the gift commitment schedule record to be resumed.
resumeDate	<b>Type</b> Date
	<b>Description</b> The date to resume the gift commitment schedule.
updateReason	<b>Type</b> String
	<b>Description</b> The reason the gift commitment schedule is to be resumed.

# Outputs

Input	Details
giftCammitmentScheduleIdsList	Туре
	String

### Input Details

### Description

A comma-delimited list of gift commitment schedule IDs for schedules that were created or updated.

## Example

Here's a request for the Resume Gift Commitment Schedule action.

Here's a response for the Resume Gift Commitment Schedule action.

```
"actionName": "resumeGiftCommitmentSchedule",
   "errors": null,
   "isSuccess": true,
   "outputValues": {
       "giftCommitmentScheduleIdsList": [
            "6csNA000000hbxpYAA"
       ]
    },
    "version": 1
}
```

# **Update Processed Gift Entries Action**

Updates the status of a specified gift entry record that is already processed. If the processing fails, the failure reason is updated.

This action is available in API version 59.0 and later for users in orgs where the Fundraising Access license is enabled and the Fundraising User system permission is assigned.

# Supported REST HTTP Methods

### URI

/services/data/v**XX.X**/actions/standard/updateProcessedGiftEntries

### **Formats**

JSON, XML

### **HTTP Methods**

POST

## Authentication

Authorization: Bearer token

# Inputs

Input	Details
donorId	Type ID
	<b>Description</b> The ID of the account of the depart that is undated when wift Dream and in a Stratum is
	The ID of the account of the donor that is updated when $\mbox{giftProcessingStatus}$ is Success.
giftEntryId	Туре
	ID
	Description
	Required.
	The ID of the gift entry record to be updated.
giftProcessingErrorDetails	Туре
	String
	Description
	The error details when giftProcessingStatus is Failure.
giftProcessingStatus	Туре
	String
	Description
	The processing status of the gift entry.
	Valid values are:
	• Failure
	• New
	• Success
giftTransactionId	Туре
	, ID
	Description
	The ID of the gift transaction record associated with the gift entry that is to be updated when giftProcessingStatus is Success.

## Outputs

Field	Details
giftEntryId	Type ID
	<b>Description</b> The ID of the gift entry record that is updated.

## Example

Here's a request for the Update Processed Gift Entries action.

Here's a response for the Update Processed Gift Entries action.

```
[
    "actionName": "updateProcessedGiftEntries",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
        "giftEntryId": "6geRM0000000GdYAI"
    },
    "version": 1
}
```

# Fundraising Metadata API Types

Metadata API enables you to access some types and feature settings that you can customize in the user interface.

For more information about Metadata API and to find a complete reference of existing metadata types, see Metadata API Developer Guide.

### AffinityScoreDefinition

Represents the affinity information used in calculations to analyze and categorize contacts for marketing purposes.

### Flow for Fundraising

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.

## AffinityScoreDefinition

Represents the affinity information used in calculations to analyze and categorize contacts for marketing purposes.



**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

 $Affinity Score Definition\ components\ have\ the\ suffix\ . affinity Score Definition\ and\ are\ stored\ in\ the\ affinity Score Definitions\ folder.$ 

## Version

AffinityScoreDefinition components are available in API version 63.0 and later.

# **Special Access Rules**

This metadata type is available only if the Fundraising Access license is enabled for the org and the Fundraising admin permission is assigned to users.

### **Fields**

Field Name	Description
affinityScoreDefinitionDesc	Field Type string
	Description
	Description of the affinity score definition.
affinityScoreDefinitionName	Field Type
	string
	Description
	Name of the affinity score definition.
affinityScoreType	Field Type
	AffinityScoreType (enumeration of type string)

Field Name	Description		
	<b>Description</b> Type of the affinity score that's defined.		
	Valid values are:		
	<ul> <li>CAP—Capacity, Ability, Propensity (CAP)</li> </ul>		
	<ul> <li>RFM—Recency, Frequency, Monetary (RFM)</li> </ul>		
	The default value is RFM.		
masterLabel	Field Type string		
	<b>Description</b> Label for this affinity score definition value. This display value is the internal label that doesn't get translated.		
numberOfMonths	Field Type int		
	<b>Description</b> Number of months to analyze the records for calculating the affinity score.		
numberOfRanges	Field Type int		
	Description		
	Required.		
	Number of ranges to use in the calculation, ranging from 0 to 9. Provide the corresponding range list values in the scoreRangeList field.		
scoreRangeList	Field Type string		
	Description		
	Required.		
	Ranges that are referenced in the affinity score calculation. This field is used with scoreRangeList. For example, to calculate RFM with numberOfRanges value as 3, provide the values for the scoreRangeList field in this format.		
	<pre>{     "R ranges":"0-30, 31-100, 100+",     "F ranges":"0-10, 11-100, 100+",     "M ranges":"0-1000, 1001-5000, 5000+" }</pre>		
sourceFieldApiNameList	Field Type		
	string		

Field Name	Description
	Description
	Required.
	API names of the source fields that are referenced in the score calculation.
sourceObjectApiNameList	Field Type
	string
	Description
	API names of the source objects that are referenced in the score calculation.
targetFieldApiNameList	Field Type
	string
	Description
	Required.
	API names of the target fields where the calculated scores are added.
targetObjectApiName	Field Type
	string
	API name of the target object where the calculated scores are added.

## **Declarative Metadata Sample Definition**

This example shows a sample of an AffinityScoreDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AffinityScoreDefinition
xmlns="http://soap.sforce.com/2006/04/metadata">
<affinityScoreDefinitionDesc>RFM Affinity Score</affinityScoreDefinitionDesc>
<affinityScoreDefinitionName>AffinityScoreDefinition RFM</affinityScoreDefinitionName>
<affinityScoreType>RFM</affinityScoreType>
<masterLabel>MasterLabel/masterLabel>
<numberOfMonths>12</numberOfMonths>
<numberOfRanges>3</numberOfRanges>
<scoreRangeList>
        [
            "name": "R Ranges",
            "direction": "ascending",
            "ranges": [30,90,180]
          },
            "name": "F Ranges",
            "direction": "descending",
            "ranges": [10,15,100]
          },
```

```
"name": "M Ranges",
           "direction": "descending",
           "ranges": [500,1000,5000]
    ]
     </scoreRangeList>
<sourceFieldApiNameList>
           "name": "R Source",
           "values":
               [
                   "fieldName": "DonorGiftSummary.DaysSinceLastGift",
                   "fieldWeight": 1
               ]
         },
           "name": "F Source",
           "values":
               [
                   "fieldName": "DonorGiftSummary.GiftCount",
                   "fieldWeight": 1
               ]
         },
           "name": "M Source",
           "values":
                   "fieldName": "DonorGiftSummary.TotalGiftsCount",
                   "fieldWeight": 1
               ]
     </sourceFieldApiNameList>
<targetFieldApiNameList>
       [
           "name": "R Target",
           "values":
               [
                   "fieldName": "DonorGiftSummary.RecencyScore",
                   "fieldWeight": 1
         },
           "name": "F Target",
```

Fundraising Flow for Fundraising

This example shows a sample of the package.xml file that references the previous definition.

## Wildcard Support in the Manifest File

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

## Flow for Fundraising

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.

## FlowActionCall

Fundraising exposes additional actionType values for the FlowActionCall Metadata type. For more information on Flow and FlowActionCall metadata type, see Flow.

Fundraising Flow for Fundraising

Field Name	Field Type	Description
actionType	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Business Rules Engine include:
		• closeGiftCommitment—Updates the status of a gift commitment to closed and updates the status for each of its unpaid and failed gift transactions. This value is available in API version 59.0 and later.
		<ul> <li>manageCustomGiftCmtSchds—Creates or updates up to 15 custom gift commitment schedule records and their associated gift transaction records. This value is available in API version 59.0 and later.</li> </ul>
		<ul> <li>manageGiftDefaultDesignations—Creates and manages     Gift Default Designation records for a gift entry associated with a     campaign, opportunity, or gift commitment. This value is available     in API version 59.0 and later.</li> </ul>
		• manageGiftTrxnDesignations—Creates and manages Gift Transaction Designation records for a gift transaction. This value is available in API version 59.0 and later.
		<ul> <li>manageRcrGiftCmtSchd—Creates or updates a recurring type of gift commitment schedule record and creates the first upcoming gift commitment transaction record. This value is available in API version 59.0 and later.</li> </ul>
		• processGiftEntries—Processes, singly or as part of a batch, a specified gift entry ID, creating related donor, gift transaction, gift transaction designation, and gift soft credit records. This value is available in API version 59.0 and later.
		<ul> <li>pauseGiftCommitmentSchedule—Pauses a gift commitment schedule for a specified period of time. This value is available in API version 59.0 and later.</li> </ul>
		• processGiftCommitment—Updates the status and other relevant fields for a gift commitment based on the statuses of the associated gift transactions and the current gift commitment schedule. This value is available in API version 59.0 and later.
		• resumeGiftCommitmentSchedule—Resumes a paused gift commitment schedule on a specified date. This value is available in API version 59.0 and later.
		<ul> <li>updateProcessedGiftEntries—Updates the status of a specified gift entry record that is already processed. If the processing fails, the failure reason is updated. This value is available in API version 59.0 and later.</li> </ul>

# Fundraising 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

#### FundraisingConfig

Represents a collection of settings to configure Fundraising. This object is available in API version 59.0 and later.

### FieldMappingConfig

Represents the configuration for fields mapped between a source object and one or more destination objects and fields. This object is available in API version 63.0 and later.

### FieldMappingConfigItem

Represents the fields mapped between a defined source object and the destination object and fields. This object is available in API version 63.0 and later.

# FundraisingConfig

Represents a collection of settings to configure Fundraising. This object is available in API version 59.0 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**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

## **Fields**

Field	Details
DeveloperName	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The unquue name for FundraisingConfig.

Field	Details
DonorExternalIdField	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The field that's used as the external ID for donor lookup during gift entry. Donor name is the default lookup. This field is available from API version 62.0 and later.
DonorMatchingMethod	<b>Type</b> picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the donor matching method that's used as the default method for the Business Process API.
	Possible values are:
	<ul> <li>Duplicate_Management_Rules—Duplicate Management Rules</li> </ul>
	No_Matching—No Matching
	The default value is Duplicate_Management_Rules.
FailedTransactionCount	Type int
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The count of consecutively failed transactions before the gift commitment status is changed to Failing. If set to 0, the status is never auto-changed to Failing.
HouseholdSoftCreditRole	Туре
	string
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The soft credit role that's assigned to members of the donor's household.
InstallmentExtDayCount	Туре
	int
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Field	Details		
	<b>Description</b> The number of days before or after the scheduled gift transaction due date for the gift to appear in Gift Entry as a match to fulfill an open gift transaction.		
IsHshldSoftCrAutoCrea	Туре		
	boolean		
	Properties  Croate Defaulted on create Filter Croup Sort Undate		
	Create, Defaulted on create, Filter, Group, Sort, Update		
	<b>Description</b> Indicates whether soft credits are automatically created for household members (true) or not (false) when the donor donates.		
Language	<b>Type</b> picklist		
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update		
	<b>Description</b> The language of the FundraisingConfig		
	Possible values are:		
	• da—Danish		
	• de—German		
	• en_US—English		
	• es—Spanish		
	• es_MX—Spanish (Mexico)		
	• fi—Finnish		
	• fr—French		
	• it—Italian		
	• ja—Japanese		
	• ko—Korean		
	• nl_NL—Dutch		
	<ul><li>no—Norwegian</li><li>pt BR—Portuguese (Brazil)</li></ul>		
	• ru—Russian		
	• sv—Swedish		
	• th—Thai		
	• zh cn—Chinese (Simplified)		
	• zh_TW—Chinese (Traditional)		
LapsedUnpaidTrxnCount	<b>Type</b> int		

Field	Details
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The count of consecutive unpaid transactions before the gift commitment status is changed to Lapsed. If set to 0, the status is never auto-changed to Lapsed.
MasterLabel	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Label for the FundraisingConfig. In the UI, this field is Application Record Type Configuration.
NamespacePrefix	Туре
	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:
	<ul> <li>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.</li> </ul>
	• 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.
OutreachSourceCodeGenFmla	Туре
	string
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The outreach source code generation formula that's composed of the selected formula components.

Available in API version 63.0 and later.

Field	Details
ShouldClosePaidRcrCmt	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether to automatically close a recurring gift commitment when it has no ongoing or future schedule, and no unpaid transaction (true) or not (false).
ShouldCreateRcrSchdTrxn	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the next transaction in a recurring schedule is automatically created
	(true) or not (false).
UtmCampaignSrcObj	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The UTM code of the campaign for which the donation was received. This field is available
	from API version 60.0 and later.
UtmCampaignSrcObjField	Туре
	string
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The UTM code of the campaign for which the donation was received. This field is available
	from API version 60.0 and later.
UtmMediumSrcObj	Time
-	<b>Type</b> string
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	The UTM code of the outreach message channel from which the donation originated. This
	field is available from API version 60.0 and later.
UtmMediumSrcObjField	<b>T</b>
o charearamor con Jr tera	Type
	string

**Fundraising** FieldMappingConfig

Field	Details
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The UTM code of the outreach message channel from which the donation originated. This field is available from API version 60.0 and later.
UtmSourceSrcObj	<b>Type</b> string
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The UTM code of the source from which the donation originated. This field is available from API version 60.0 and later.
UtmSourceSrcObjField	<b>Type</b> string
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The UTM code of the source from which the donation originated. This field is available from API version 60.0 and later.

# FieldMappingConfig

Represents the configuration for fields mapped between a source object and one or more destination objects and fields. This object is available in API version 63.0 and later.



(1) 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 Calls**

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

# **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

Fundraising FieldMappingConfig

# Fields

Field	Details
Description	Туре
	textarea
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The description of the field mapping configuration.
DeveloperName	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The unqiue name for FieldMappingConfig.
Language	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The language of the FieldMappingConfig.
	Possible values are:
	• da—Danish
	• de—German
	• en_US—English
	• es—Spanish
	<ul><li>es_MX—Spanish (Mexico)</li><li>fi—Finnish</li></ul>
	• fr—French
	• it—Italian
	• ja—Japanese
	• ko—Korean
	• nl_NL—Dutch
	• no—Norwegian
	• pt_BR—Portuguese (Brazil)
	• ru—Russian
	• sv—Swedish
	• th—Thai
	• zh_CN—Chinese (Simplified)

Fundraising FieldMappingConfig

Field	Details
	• zh_TW—Chinese (Traditional)
MasterLabel	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Label for the FieldMappingConfig.
NamespacePrefix	Туре
	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:
	<ul> <li>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.</li> </ul>
	<ul> <li>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.</li> </ul>
ProcessType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the type of process that the field mapping configuration supports.
	Possible values are:
	• ChangeRequest
	• GiftEntry
	• Incident
	• Problem
	The default value is GiftEntry.

Fundraising FieldMappingConfigItem

Field	Details
SourceObjectId	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The ID of the source object for all of the fields mapped in the configuration.
	Possible values are:
	• GiftEntry

# FieldMappingConfigItem

Represents the fields mapped between a defined source object and the destination object and fields. This object is available in API version 63.0 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 Calls**

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

# **Special Access Rules**

This object is available only if the Fundraising Access license is enabled and the Fundraising User system permission is assigned to users.

## **Fields**

Field	Details
DestinationFieldId	<b>Type</b> picklist
	Properties  Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The ID of the destination field for the field mapping configuration.
DestinationObjectId	<b>Type</b> picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The ID of the destination object for the field mapping configuration.

Fundraising FieldMappingConfigItem

Field	Details
FieldMappingConfigId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The parent field mapping configuration associated with the field mapping configuration item.
	This field is a relationship field.
	<b>Relationship Name</b> FieldMappingConfig
	Relationship Type  Master-detail
	<b>Refers To</b> FieldMappingConfig (the master object)
Sequence	<b>Type</b> int
	Properties Create, Filter, Group, Sort, Update
	<b>Description</b> The order number of the field relative to other fields, determining the sequence in which fields are displayed within a custom user interface.
SourceFieldId	<b>Type</b> picklist
	Properties  Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The ID of the source field for the field mapping configuration.

# **CHAPTER 4** Program Management

## In this chapter ...

- Program
  ManagementStandard Objects
- Program Management Business APIs

This guide provides information about the objects and APIs that Program Management uses. You can also find developer resources for features that can be used to extend Program Management.

## EDITIONS

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

# **Program Management Standard Objects**

Program Management data model provides objects and fields to manage programs and benefits for your nonprofit organization.

#### Benefit

Represents information about benefits associated with a program. This object is available with Program Management in API version 57.0 and later.

### BenefitAssignment

Represents the enrollment information of an individual to a benefit. This object is available with Program Management in API version 57.0 and later.

#### BenefitDisbursement

Represents the allocation of an enrollee's benefit that can be made as monetary or non-monetary with different frequencies. This object is available with Program Management in API version 57.0 and later.

#### BenefitSchedule

Represents information about the plan for delivering the benefit. This object is available in API version 57.0 and later.

## Benefit Schedule Assignment

Represents the junction between Benefit Schedule and Benefit Assignment objects. This object is available in API version 59.0 and later

#### BenefitSession

Represents information about an instance of a planned benefit delivery This object is available in API version 57.0 and later.

#### BenefitType

Represents the type of benefit being delivered. Use benefit types in conjunction with units of measure to report on how many or how much of a type of benefit your organization delivers across programs. This object is available with Program Management in API version 57.0 and later.

#### CaseProgram

Represents the junction between Case and Program objects. This object is available in API version 57.0 and later.

### Program

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

#### ProgramCohort

Represents information about the participants of a program cohort. This object is available in API version 61.0 and later.

#### ProgramCohortMember

Represents program enrollees that are part of a given cohort. This object is available in API version 61.0 and later.

### ProgramEnrollment

Represents details of enrollment for benefits in a program. This object is available in API version 57.0 and later.

#### RecurrenceSchedule

Represents the recurrence schedule for a benefit schedule. This object is available with Program Management in API version 57.0 and later.

## **EDITIONS**

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

Benefit **Program Management** 

# Benefit

Represents information about benefits associated with a program. This object is available with Program Management in API version 57.0



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 Calls**

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

Field	Details
BenefitManagerId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The person in charge of the benefit.
	This field is a relationship field.
	Relationship Name BenefitManager
	Relationship Type  Lookup
	<b>Refers To</b> User
BenefitStatus	<b>Type</b> picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the benefit.
	Possible values are:
	• Active
	• Cancelled
	• Completed
	• Planned
	The default value is Active.

Field	Details
BenefitTypeId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	<b>Description</b> Specifies the type of the benefit.
	This field is a relationship field.
	Relationship Name BenefitType
	Relationship Type  Master-Detail
	Refers To  BenefitType
BnftDisbFieldSetApiName	<b>Type</b> string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The API name of the field set that groups benefit specific fields for the benefit disbursement
	object.
CurrentMonthDisbursedQty	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The total quantity of benefits disbursed in the current month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
CurrentYearAssignedQty	Туре
	double
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total quantity of benefits assigned in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
CurrentYearDisbursedQty	Type double

Field	Details
	Properties Control of the New York Control of the New
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total quantity of benefits disbursed in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
Description	<b>Type</b> textarea
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The description of the benefit.
EndDateTime	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The end date until when the benefit is valid.
EnrollmentCount	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The number of times the benefit is applicable to an individual.
GoalDefinitionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The goal definition associated with the benefit.
	This field is a relationship field.
	<b>Relationship Name</b> GoalDefinition
	<b>Relationship Type</b> Lookup
	Refers To  GoalDefinition

Field	Details
IsActive	Туре
	boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates if the benefit is active.
	The default value is false.
MaximumBenefitAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The maximum amount that can be disbursed for a period.
MinimumBenefitAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The minimum amount that can be disbursed for a period.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the benefit.
PreviousMonthDisbursedQty	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update
	Description
	The total quantity of benefits disbursed in the previous month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearAssignedQty	Туре
	·/r -

Field	Details
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total quantity of benefits assigned in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearDisbursedQty	Type double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total quantity of benefits disbursed in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
ProgramId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The identifier of the program that's associated with the benefit.
	This field is a relationship field.
	Relationship Name Program
	Relationship Type Lookup
	Refers To Program
StartDateTime	Туре
	dateTime
	Properties Create, Filter, Nillable, Sort, Update
	Description The date when the benefit starts.
UnitId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The identifier of the unit of measure that's used to calculate the benefit.
	This field is a relationship field.
	Relationship Name Unit
	Relationship Type Lookup
	<b>Refers To</b> UnitOfMeasure

# BenefitAssignment

Represents the enrollment information of an individual to a benefit. This object is available with Program Management in API version 57.0 and later.

# **Supported Calls**

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

Field	Details
BenefitId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Name of the benefit that is associated with the assignment.
	This field is a relationship field.
	Relationship Name Benefit
	Relationship Type Lookup
	<b>Refers To</b> Benefit
EndDateTime	<b>Type</b> dateTime

Field	Details
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The end date up to when the assignment is valid.
EnrolleeId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Name of the benefit assignee.
	This field is a polymorphic relationship field.
	Relationship Name Enrollee
	Relationship Type  Lookup
	Refers To Account, Contact
EnrollmentCount	Туре
	int
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of times the benefit is applicable to an individual.
EntitlementAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The benefit amount that an enrollee is eligible for.
MaximumBenefitAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The maximum amount that can be disbursed for a period.

Field	Details
MinimumBenefitAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	Description
	The minimum amount that can be disbursed for a period.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> Name of the benefit assignment.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> Group, User
ParentRecordId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Required. The parent record associated with the benefit assignment.
	This field is a polymorphic relationship field. Use <code>CarePlan</code> if the benefit is part of a structured care plan, <code>GoalAssignment</code> if it supports a specific goal, <code>IndividualApplication</code> if assigned during intake, and <code>ProgramEnrollment</code> if the participant is only using program management features.
	Relationship Name ParentRecord

Field	Details
	Relationship Type Lookup
	<b>Refers To</b> CarePlan, GoalAssignment, IndividualApplication, ProgramEnrollment
Priority	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the priority of the benefit assignment.
	Possible values are:
	• High
	• Low
	• Medium
ProgramEnrollmentId	<b>Type</b> reference
	Properties Control of the Control of
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The identifier of the program enrollment record that's associated with the benefit assignment.
	This field is a relationship field.
	Relationship Name ProgramEnrollment
	Relationship Type Lookup
	Refers To
	ProgramEnrollment
StartDateTime	<b>Type</b> dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The start date from when the assignment begins.
Status	<b>Type</b> picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> Specifies the status of the benefit assignment.
	Possible values are:
	• Active
	• Completed
	• Enrolled
	• Waitlisted
	• Withdrawn
	The default value is Enrolled.
TaskJobStatus	<b>Type</b> picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	<b>Description</b> Specifies the status of the task in the task queue.
	Possible values are:
	• Completed
	• Failed
	• InProgress - In Progress
	• Submitted
TaskJobStatusMessage	<b>Type</b> textarea
	Properties Nillable
	<b>Description</b> The message that describes the status of the task in the queue.
UnitofMeasureId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The identifier of the unit of measure that's used to calculate the benefit type.
	This field is a relationship field.
	Relationship Name UnitofMeasure
	Relationship Type Lookup

**Program Management** BenefitDisbursement

Field	Details
	Refers To
	UnitOfMeasure

## BenefitDisbursement

Represents the allocation of an enrollee's benefit that can be made as monetary or non-monetary with different frequencies. This object is available with Program Management in API version 57.0 and later.



(1) 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 Calls**

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

Field	Details
ActualCompletionDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Sort, Update
	<b>Description</b> The date when the benefit disbursement was completed.
ApprovalStatus	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the disbursement status of the benefit.
	Possible values are:
	• Approved
	• In Review
	• Not Applicable
	• Pending
	• Rejected
BenefitAssignmentId	Туре
	reference

Program Management BenefitDisbursement

Field	Details
	Properties  Create, Filter, Group, Sort
	<b>Description</b> The benefit assignment that's associated with the disbursement.
	This field is a relationship field.
	Relationship Name BenefitAssignment
	Relationship Type  Master-Detail
	Refers To BenefitAssignment
BenefitSessionId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The benefit session that's associated with the benefit disbursement. This field is accessible if you enabled Data Protection and Privacy in Setup.
	This field is a relationship field.
	Relationship Name BenefitSession
	Relationship Type Lookup
	Refers To  BenefitSession
Description	<b>Type</b> string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> A description about the benefit that is disbursed. This field is accessible if you enabled Data Protection and Privacy in Setup.
DisbursedQuantity	Туре
	double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update

Program Management BenefitDisbursement

Field	Details
	<b>Description</b> The quantity of the benefit that's disbursed. This field is accessible if you enabled Data Protection and Privacy in Setup.
DisbursementStatus	Туре
	picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the benefit disbursement.
	Possible values are:
	• Absent
	• Completed
	• Enrolled
	• Excused
	The default value is Enrolled.
	This field is accessible if you enabled Data Protection and Privacy in Setup.
EndDate	<b>Type</b> dateTime
	Properties  Create, Filter, Nillable, Sort, Update
	<b>Description</b> The end date of the benefit period in every payment cycle.
Name	<b>Type</b> string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> Name of the benefit disbursement.
ProgramEnrollmentId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program enrollment record that's associated with the benefit disbursement. This field is accessible if you enabled Data Protection and Privacy in Setup.
	This field is a relationship field.

Program Management BenefitDisbursement

Field	Details
	Relationship Name ProgramEnrollment
	Relationship Type
	Lookup
	Refers To ProgramEnrollment
RecipientCount	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The count of recipients who received the benefit. This field is accessible if you enabled Data Protection and Privacy in Setup.
RecipientId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The participant who receives a benefit.
	This field is a polymorphic relationship field.
	Relationship Name Recipient
	Relationship Type Lookup
	Refers To Account, Contact
RecipientType	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the recipient type of the benefit that's disbursed.
	Possible values are:
	• Anonymous
	Program Enrollment
	• Walk-in
	The default value is ProgramEnrollment.

BenefitSchedule **Program Management** 

Field	Details
	This field is accessible if you enabled Data Protection and Privacy in Setup.
StartDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The start date of the benefit period in every payment cycle.
UnitOfMeasureId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The identifier of the unit of measure that's used to calculate the benefit type. This field is accessible if you enabled Data Protection and Privacy in Setup.
	This field is a relationship field.
	Relationship Name UnitOfMeasure
	Relationship Type Lookup
	Refers To UnitOfMeasure

## BenefitSchedule

Represents information about the plan for delivering the benefit. 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 Calls

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

Field	Details	
BenefitId	<b>Type</b> reference	

Program Management BenefitSchedule

Field	Details
	Properties Create, Filter, Group, Sort
	<b>Description</b> The identifier of the benefit that's associated with the schedule.
	This field is a relationship field.
	Relationship Name Benefit
	Relationship Type  Master-Detail
	Refers To Benefit
DefaultBenefitQuantity	Type double
	Properties Create, Filter, Sort, Update
	<b>Description</b> The default quantity of benefit that's provided within a session of benefit schedule.
Description	Type textarea
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The description of the benefit schedule.
FirstSessionEndDateTime	Type dateTime
	Properties Create, Filter, Sort, Update
	<b>Description</b> The date and time when the first session ends in the benefit schedule.
FirstSessionStartDateTime	Type dateTime
	Properties Create, Filter, Sort, Update
	<b>Description</b> The date and time when the first session begins in the benefit schedule.

Program Management BenefitSchedule

Field	Details
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	Type dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The date when the record was last viewed.
MaximumParticipantCount	Type int
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The maximum number of participants in a session.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the benefit schedule.
OwnerId	Type reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	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.

#### BenefitScheduleFeed

Feed tracking is available for the object.

#### BenefitScheduleHistory

History is available for tracked fields of the object.

# BenefitScheduleAssignment

Represents the junction between Benefit Schedule and Benefit Assignment objects. This object is available in API version 59.0 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 Calls**

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

## **Special Access Rules**

Field	Details
BenefitAssignmentId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The benefit assignment associated with the benefit schedule.
	This field is a relationship field.
	Relationship Name BenefitAssignment
	Relationship Type Lookup
	Refers To  BenefitAssignment
BenefitScheduleId	<b>Type</b> reference

Field	Details
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The benefit schedule to which benefit participants are being assigned.
	This field is a relationship field.
	Relationship Name BenefitSchedule
	Relationship Type  Master-Detail
	Refers To  BenefitSchedule
EndDateTime	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The end date and time of the participant's assignment to the benefit schedule.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the benefit schedule assignment.

Program Management BenefitSession

Field	Details
StartDateTime	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The start date and time of the participant's assignment to the benefit schedule.

# BenefitSession

Represents information about an instance of a planned benefit delivery 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 Calls**

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

Field	Details
BenefitScheduleId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The identifier of the benefit schedule that's associated with the benefit session.
	This field is a relationship field.
	Relationship Name BenefitSchedule
	Relationship Type  Master-Detail
	Refers To  BenefitSchedule
EndDateTime	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Sort, Update

Program Management BenefitSession

Field	Details
	<b>Description</b> The end date and time of the benefit session.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The date when the record was last viewed.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the benefit session.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the benefit session record owner.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
StartDateTime	<b>Type</b> dateTime

Field	Details
	Properties
	Create, Filter, Sort, Update
	Description
	The start date and time of the benefit session.
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	The status of the benefit session.
	Possible values are:
	• Cancelled
	• Completed
	• Postponed
	• Scheduled

### **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.

### BenefitSessionFeed

Feed tracking is available for the object.

### BenefitSessionHistory

History is available for tracked fields of the object.

# BenefitType

Represents the type of benefit being delivered. Use benefit types in conjunction with units of measure to report on how many or how much of a type of benefit your organization delivers across programs. This object is available with Program Management in API version 57.0 and later.

Field	Details
Category	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Required. The category of the benefit type. Picklist values aren't provided for this field and must be added based on the requirements of the organization.

Field	Details
Description	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The description of benefit type.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the benefit type.
OwnerId	Туре
	reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	ID of the owner of this record.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type
	Lookup
	Refers To
	Group, User
ProcessType	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Required. The process type associated with the program management benefit type.
	Possible value: Program Management
Туре	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description
	Specifies the type of benefit being offered as part of the program.
	Possible values are:
	• Goods
	• Monetary
	• Service
	The default value is Service.
UnitofMeasureId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The identifier of the unit of measure that's used to calculate the benefit type.
	This field is a relationship field.
	Relationship Name
	UnitofMeasure
	Relationship Type
	Lookup
	Refers To
	UnitOfMeasure

# CaseProgram

Represents the junction between Case and Program objects. This object is available in API version 57.0 and later.

(1) 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 Calls

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

Field	Details
CaseId	<b>Type</b> reference

Field	Details	
	Properties Create, Filter, Group, Sort	
	Description	
	The identifer of the case that's associated with the program.	
	This field is a relationship field.	
	Relationship Name  Case	
	Relationship Type  Master-Detail	
	Refers To	
	Case	
LastReferencedDate	<b>Type</b> dateTime	
	<b>Properties</b> Filter, Nillable, Sort	
	<b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.	
LastViewedDate	<b>Type</b> dateTime	
	<b>Properties</b> Filter, Nillable, Sort	
	<b>Description</b> The date when the record was last viewed.	
Name	<b>Type</b> string	
	Properties Create, Filter, Group, idLookup, Sort, Update	
	<b>Description</b> The name of the case program.	
ProgramId	<b>Type</b> reference	
	<b>Properties</b> Create, Filter, Group, Sort, Update	
	<b>Description</b> The identifier of the program that's associated with the case.	
	This field is a relationship field.	

Field	Details	
	<b>Relationship Name</b> Program	
	<b>Relationship Type</b> Lookup	
	<b>Refers To</b> Program	

# Program

Represents information about the enrollment and disbursement of benefits in a program. 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()

Field	Details
ActiveEnrolleeCount	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update
	Description  The count of program enrollees with IsActive on ProgramEnrollment selected. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
AdditionalContext	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The additional context about the program.
CurrentMonthDisbCount	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update

Field	Details
	<b>Description</b> The count of benefits disbursed in the current month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
CurrentYearDisbCount	<b>Type</b> double
	Properties  Create, Filter, Nillable, Sort, Update
	<b>Description</b> The count of benefits disbursed in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
EndDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the program ends.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
Name	<b>Type</b> string
	Properties  Create, Filter, Group, idLookup, Sort, Update

Field	Details
	<b>Description</b> The name of the program.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The user who owns the object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ParentProgramId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The associated parent program.
	This field is available from API version 59.0 and later.
	This field is a relationship field.
	Relationship Name ParentProgram
	Relationship Type Lookup
	Refers To Program
PreviousMonthDisbCount	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update
	Description
	The count of benefits disbursed in the previous month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.

Field	Details
PreviousYearDisbCount	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The count of benefits disbursed in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
StartDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the program begins.
Status	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The status of the program.
	Possible values are:
	• Active
	• Cancelled
	• Completed
	• Planned
	This field is accessible if you enabled Data Protection and Privacy in Setup.
Summary	<b>Type</b> string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The summary of the program.
TotalEnrolleeCount	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update

Program Management ProgramCohort

Field	Details
	Description
	The total count of enrollees in the program. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
UsageType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the usage type of the program.
	Possible value is ProgramManagement.

### **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.

#### **ProgramFeed**

Feed tracking is available for the object.

#### **ProgramHistory**

History is available for tracked fields of the object.

#### ProgramOwnerSharingRule

Sharing rules are available for the object.

# **ProgramCohort**

Represents information about the participants of a program cohort. This object is available in API version 61.0 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 Calls

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

## **Special Access Rules**

This object is available only if the Advanced Program Management license is enabled, Program Cohorts are enabled, and the Advanced Program Management system permission is assigned to users.

Program Management ProgramCohort

Details
Туре
int
Properties
Filter, Group, Nillable, Sort
Description
The number of members that are actively participating in the cohort.
This is a roll-up summary field.
Туре
textarea
Properties
Create, Nillable, Update
Description
The description of the program cohort.
Туре
date
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
The end date of the program cohort.
Туре
dateTime
Properties
Filter, Nillable, Sort
Description
The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
Туре
dateTime
Properties Filter, Nillable, Sort
Description
The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Туре

Program Management ProgramCohort

Field	Details
	Properties  Create, Filter, Group, Nillable, Sort, Update
	Description  The maximum number of members that can be active in a cohort. Add custom validation to enforce this maximum count.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the program cohort.
ProgramId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The program associated with the cohort.
	This field is a relationship field.
	Relationship Name Program
	Relationship Type  Master-detail
	Refers To Program (the master object)
StartDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The start date of the program cohort.
Status	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the status of the program cohort.
	Possible values are:

**Program Management** ProgramCohortMember

Field	Details
	• Active
	• Canceled
	• Completed
	• Planned

### **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.

#### **ProgramCohortFeed**

Feed tracking is available for the object.

### ProgramCohortHistory

History is available for tracked fields of the object.

## ProgramCohortMember

Represents program enrollees that are part of a given cohort. This object is available in API version 61.0 and later.



(1) 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 Calls**

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

## **Special Access Rules**

This object is available only if the Advanced Program Management license is enabled, Program Cohorts are enabled, and the Advanced Program Management system permission is assigned to users.

Field	Details
IsRemovedFromCohort	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates if the program cohort member was removed from the cohort.  The default value is false.

Program Management ProgramCohortMember

Field	Details
LastReferencedDate	Туре
	dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Туре
	string
	Properties  Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the program cohort member.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the user who owns the record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ProgramCohortId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort

Program Management ProgramCohortMember

Field	Details
	Description
	The program cohort associated with the program cohort member.
	This field is a relationship field.
	Relationship Name ProgramCohort
	Relationship Type  Master-detail
	Refers To ProgramCohort (the master object)
ProgramEnrolleeId	<b>Type</b> reference
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The account or contact enrolled in the program.
	This field is a polymorphic relationship field.
	This field is a calculated field.
	Relationship Name ProgramEnrollee
	Relationship Type Lookup
	Refers To
	Account, Contact
ProgramEnrollmentId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The program enrollment associated with the program cohort member.
	This field is a relationship field.
	Relationship Name ProgramEnrollment
	Relationship Type Lookup
	Refers To ProgramEnrollment

Program Management ProgramEnrollment

Field	Details
ProgramEnrollmentStatus	<b>Type</b> picklist
	<b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	<b>Description</b> Specifies the status of the program enrollment associated with this cohort member.
	This field is a calculated field.
	Possible values are:
	• Applied
	• Completed
	• Denied
	• In Progress
	• Waitlisted
	• Withdrawn
	The default value is Applied.
RemovalDate	Type
	date
	Properties  Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the program cohort member was removed from the cohort.

## **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.

### ProgramCohortMemberFeed

Feed tracking is available for the object.

### ProgramCohortMemberHistory

History is available for tracked fields of the object.

### ${\bf Program Cohort Member Owner Sharing Rule}$

Sharing rules are available for the object.

### ${\bf Program Cohort Member Share}$

Sharing is available for the object.

# ProgramEnrollment

Represents details of enrollment for benefits in a program. This object is available in API version 57.0 and later.

**Program Management** ProgramEnrollment



(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 Calls**

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

## **Fields**

Field Details			
AccountId	<b>Type</b> reference		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The ID of the account that's associated with an organization enrolled in the program.		
	This field is a relationship field.		
	Relationship Name Account		
	Relationship Type Lookup		
	Refers To Account		
ApplicationDate	<b>Type</b> date		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The date when the enrollee applied to the program.		
ContactId	<b>Type</b> reference		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The ID of the contact that's associated with an individual enrolled in the program.		
	This field is a relationship field.		
	Relationship Name Contact		

Program Management ProgramEnrollment

Field	Details
	Relationship Type Lookup
	Refers To Contact
CurrentMonthDisbCount	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The count of benefits disbursed to the enrollee in the current month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
CurrentYearDisbCount	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The count of benefits disbursed to the enrollee in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
EndDate	<b>Type</b> date
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The end date of the enrollment in the program.
IsActive	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the enrollment for the participant in the program is active (true) or not (false).
	The default value is false.
IsAnonymous	<b>Type</b> boolean

Program Management ProgramEnrollment

Field	Details  Properties		
	Create, Defaulted on create, Filter, Group, Sort, Update		
	<b>Description</b> Indicates whether the participant enrolled to the program anonymously (true) or not (false).		
	The default value is false.		
LastReferencedDate	<b>Type</b> dateTime		
	<b>Properties</b> Filter, Nillable, Sort		
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.		
LastViewedDate	<b>Type</b> dateTime		
	<b>Properties</b> Filter, Nillable, Sort		
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.		
Name	<b>Type</b> string		
	Properties Create, Filter, Group, idLookup, Sort, Update		
	<b>Description</b> The name of the program enrollment record.		
OwnerId	<b>Type</b> reference		
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update		
	<b>Description</b> The user who owns the object.		
	This field is a polymorphic relationship field.		
	Relationship Name Owner		
	Relationship Type Lookup		

Program Management ProgramEnrollment

Field	Details
	Refers To Group, User
PreviousMonthDisbCount	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The count of benefit disbursed to the enrollee in the previous month. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearDisbCount	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The count of benefits disbursed to the enrollee in the previous year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
ProgramId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The identifier of the program that's associated with the enrollee.
	This field is a relationship field.
	Relationship Name Program
	Relationship Type  Master-Detail
	Refers To Program
StartDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The start date of the enrollment in the program.

Field	Details
Status	<b>Type</b> picklist
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The enrollment status of the enrollee for the program.
	Possible values are:
	• Applied
	• Completed
	• Denied
	• In Progress
	• Waitlisted
	Withdrawn
	The default value is Applied.

## **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.

## ProgramEnrollmentFeed

Feed tracking is available for the object.

#### ProgramEnrollmentHistory

History is available for tracked fields of the object.

## ${\bf Program Enroll ment Owner Sharing Rule}$

Sharing rules are available for the object.

## ${\bf Program Enroll ment Share}$

Sharing is available for the object.

## RecurrenceSchedule

Represents the recurrence schedule for a benefit schedule. This object is available with Program Management in API version 57.0 and later.

## Supported Calls

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

# Fields

Field	Details
CompletedScheduleCount	Туре
	int
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The number of times the schedule was completed.
EndDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the schedule ends.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the recurrence schedule.
NextScheduleDateTime	Туре
	dateTime
	Properties
	Create, Filter, Sort, Update
	Description
	The date and time when the schedule is executed next.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The user who owns the object.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type Lookup

Field	Details				
	<b>Refers To</b> Group, User				
ProcessName	<b>Type</b> picklist				
	Properties Create, Filter, Group, Restricted picklist, Sort, Update				
	<b>Description</b> The name of the scheduling process that executes the request.				
	Possible values are:				
	• Industries_ActionPlan				
	• Industries_ProgramManagement				
ReferenceRecordId	<b>Type</b> reference				
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update				
	<b>Description</b> The related record for which you're creating the recurrence schedule. For example, creating a recurrence schedule for a related Benefit Schedule entity.				
	This field is a polymorphic relationship field.				
	Relationship Name ReferenceRecord				
	Relationship Type Lookup				
	Refers To ActionPlan, BenefitSchedule				
ScheduleDayValue	<b>Type</b> int				
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update				
	<b>Description</b> The days in a week when the schedule is executed. This field contains a bit mask.				
	<ul> <li>Monday = 64</li> </ul>				
	• Tuesday = 32				
	• Wednesday = 16				
	• Thursday = 8				
	• Friday = 4				
	• Saturday = 2				

Field	Details		
	• Sunday = 1		
	Multiple days are represented as the sum of their numerical values. For example, Tuesday and Thursday $= 32 + 8 = 40$ .		
ScheduleFrequency	Туре		
	picklist		
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update		
	<b>Description</b> Specifies the frequency at which the schedule is executed.		
	Possible values are:		
	• Biweekly		
	• Halyearly—Half Yearly		
	• Monthly		
	• Quarterly		
	• Weekly		
	• Yearly		
StartDate	<b>Type</b> dateTime		
	Properties Create, Filter, Sort, Update		
	<b>Description</b> The date when the schedule begins.		
Status	<b>Type</b> picklist		
	Properties  Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update		
	<b>Description</b> The status of the schedule.		
	Possible values are:		
	• Active		
	• Inactive		
TotalRecurrencesCount	<b>Type</b> int		
	Properties		
	Create, Filter, Group, Nillable, Sort, Update		

Field	Details
	<b>Description</b> The number of times the schedule is executed.

# **Program Management Business APIs**

Program Management Business APIs are RESTful APIs that are sometimes available as Apex classes and methods.

Program Management has these resources.

Resource	Description
/connect/program-mgmt/programs/\${programId}/enrollments	Enroll participants in a program. An enrollee can either be a contact or an account.
/connect/program-mgmt/programs/\${programId}/enrollments	Update program enrollments.
/connect/program-mgmt/benefit-schedules	Create a preview of the benefit scheduling session.
/connect/program-ngnt/benefit-schedules/\${benefitScheduleId}/sessions	Create a benefit schedule for a benefit session.
/correct/program-mgnt/benefit-schedules/\$[benefitScheduleId]/participants	Add participants to a benefit schedule.
/connect/program-mgmt/benefit-schedules/\${benefitScheduleId} /benefit-sessions/\${benefitSessionId}/participants	Add participants to a benefit session.
/connect/program-mgmt/benefit/\${benefitId}/benefit-disbursements	Create benefit disbursements for ad hoc walk-in participants.
/connect/program-mgmt/case-programs/\${caseId}	Create case programs.

## EDITIONS

Available in: Lightning Experience

Available in: Program Management is available with Enterprise, Unlimited, and Performance Editions with the Impact Cloud.

## **REST Reference**

You can access Program Management Business APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

## **REST Reference**

You can access Program Management 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 Program Management Business API resources.

#### Requests

Here's a list of Program Management Business API request bodies.

#### Responses

Here's a list of Program Management Business API response bodies.

## Resources

Here's a list of Program Management Business API resources.

#### Benefit Disbursements (POST)

Create benefit disbursements for ad hoc walk-in participants.

#### Benefit Session Participants (POST)

Add participants to a benefit session.

#### Benefit Schedule Participants (POST)

Asynchronously add participants to a benefit schedule.

#### Benefit Schedule Participants (DELETE)

Remove participants from a benefit schedule asynchronously.

#### Benefit Schedule Sessions (POST)

Create a benefit schedule for a benefit session.

#### Benefit Schedule Sessions Preview (POST)

Create a preview of the benefit scheduling session. Users can preview the benefit sessions before they are created.

#### Benefit Disbursement Field Set API Names

Retrieve the API names of the field sets associated with a benefit disbursement object.

#### Case Programs (POST)

Create case programs.

#### **Gift Transactions**

Get gift transactions associated with a gift commitment record.

#### Gift Transaction Designations

Get designations associated with a gift transaction, campaign, commitment, or opportunity.

#### Gift Commitment Transactions

Get a list of gift transactions associated with a gift commitment for a donor account.

#### Gift Commitment Default Designations

Get default designations associated with a gift commitment.

## Gift Campaign Default Designations

Get default designations associated with a gift campaign.

Program Enrollments (POST)

Enroll participants in a program.

Program Enrollments (PUT)

Update program enrollments.

## Benefit Disbursements (POST)

Create benefit disbursements for ad hoc walk-in participants.

#### Resource

```
/connect/program-mgmt/benefit/${benefitId}/benefit-disbursements
```

## **Example URI**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/program-mgmt/benefit/${benefitId}/benefit-disbursements
```

#### **Available version**

570

#### **HTTP** methods

POST

#### **Request body for POST**

#### Root XML tag

<BenefitDisbursementsInputRepresentation>

#### JSON example

```
"enrollees": {
    "enrolleeList": [
        "003T1000001U6axIAC"
    ]
},
    "quantity": 2.5,
    "status": "Enrolled",
    "disbursementDate": "2022-12-18T14:30:00.000"
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
disbursementDate	String	The date on which the benefit is disbursed.	Required	57.0
enrollees	String[]	The list of enrollees who will receive the benefit disbursement. The enrollee can either be a contact or an account.	Required	57.0

Name	Туре	Description	Required or Optional	Available Version
quantity	Double	The quantity of the benefit to be disbursed.	Required	57.0
status	String	The status of the benefit disbursement.	Required	57.0

## **Response body for POST**

Benefit Disbursements Output

## Benefit Session Participants (POST)

Add participants to a benefit session.

#### Resource

 $/connect/program-mgmt/benefit-schedules/\$\{benefitScheduleId\}/benefit-sessions/\$\{benefitSessionId\}/participants\}$ 

#### **Example URI**

## **Available version**

57.0

## **HTTP** methods

POST

## **Request body for POST**

#### Root XML tag

<BenefitSessionParticipantsInputRepresentation>

### JSON example

```
{
  "enrollees": {
    "enrolleeList": [
        "003xx000004WhKeAAK"
    ]
  }
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit session. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

## **Response body for POST**

Benefit Session Participants Output

## Benefit Schedule Participants (POST)

Asynchronously add participants to a benefit schedule.

#### Resource

/connect/program-mgmt/benefit-schedules/\${benefitScheduleId}/participants

#### **Example URI**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/participants
```

#### **Available version**

57.0

#### **HTTP** methods

POST

#### **Request body for POST**

#### Root XML tag

<BenefitScheduleParticipantsInputRepresentation>

#### JSON example

```
{
  "enrollees": {
    "enrolleeList": [
         "003xx000004WhKeAAK"
    ]
  }
}
```

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit schedule. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

## **Response body for POST**

Benefit Schedule Participants Output

## Benefit Schedule Participants (DELETE)

Remove participants from a benefit schedule asynchronously.

Remove participants from a benefit schedule asynchronously. Include benefit schedule assignment records in the API's operation. Benefit schedule assignments enable accurate updating of end dates when removing participants from sessions.

Removing a participant from a benefit schedule:

- Updates the end date of all the active benefit schedule assignments associated with the participant to a current date. If a future session's startingBenefitSessionId is provided, Salesforce updates the end date for the benefit schedule assignments to the end date of that session. If the session is in the past or no startingBenefitSessionId is provided, Salesforce updates the end date to the current date.
- Deletes benefit disbursements for future sessions whose attendance wasn't changed from the default Enrolled status to Completed, Excused, or Absent. If a startingBenefitSessionId is provided, Salesforce removes participants from that session onwards, including past and future sessions. If a startingBenefitSessionId isn't provided, Salesforce removes participants from current and future sessions.

#### Resource

/connect/program-mgmt/benefit-schedules/\${benefitScheduleId}/benefit-assignments

#### Resource example

https://**yarInstane**.salesforce.com/services/data/v6.0/correct/programmynt/benefit-schedules/85-0000006/benefit-assignments?ids=PA-0000001, BA-0000001

https://portfetame-slesfore.com/services/Ha/630/corect/organgut/serfit-sheiles/S/serfitSheileT/Nerfit-sheignerts/chFA(00001),FA(00011)MatatingBrefitSesionTeFF(00011)

#### **Available version**

59.0

#### **HTTP** methods

**DELETE** 

#### **Query parameters for DELETE**

Parameter Name	Туре	Description	Required or Optional	Available Version
ids	String[]	Valid IDs of benefit assignments related to the participants to be removed. You can provide a maximum of 100 IDs.	Required	59.0
starting <del>l</del> eefitSessionR	1 String[]	Valid benefit session ID associated with the benefit assignment IDs. If provided, the operation will affect that session and all subsequent sessions where attendance is yet to be marked. If not provided, the operation will default to affecting only future sessions.	Optional	61.0

## Benefit Schedule Sessions (POST)

Create a benefit schedule for a benefit session.

#### Resource

 $/{\tt connect/program-mgmt/benefit-schedules/\$\{benefitScheduleId\}/sessions}$ 

#### **Example URI**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/program-mgmt/benefit-schedules/${benefitScheduleId}/sessions
```

#### **Available version**

57.0

#### **HTTP** methods

**POST** 

#### **Response body for POST**

Generate Benefit Session Output

## Benefit Schedule Sessions Preview (POST)

Create a preview of the benefit scheduling session. Users can preview the benefit sessions before they are created.

#### Resource

```
/connect/program-mgmt/benefit-schedules
```

#### **Example URI**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/program-mgmt/benefit-schedules
```

#### **Available version**

57.0

#### **HTTP** methods

POST

#### **Request body for POST**

## **Root XML tag**

<PreviewBenefitSessionInputRepresentation>

#### JSON example

```
"benefitScheduleName": "Nov Weekday schedule",
"firstSessionStartDate": "2022-11-14T14:30:00.000",
"firstSessionEndDate": "2022-11-14T15:00:00.000",
"scheduleFrequency": "Weekly",
"scheduleDays": 96,
"mode": "dryRun",
"noOfSessions": 5,
"totalRecurrencesCount": 10
}
```

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
benefitScheduleName	e String	The name of the benefit schedule.	Required	57.0

Name	Туре	Description	Required or Optional	Available Version
firstSessianEndDate	String	The date and time when the first session ends in the benefit schedule.	Required	57.0
firstSessionStartDate	String	The date and time when the first session starts in the benefit schedule.	Required	57.0
mode	String	The mode of the benefit schedule. The dryRun mode indicates that no data is created.	Optional	57.0
noOfSessions	Integer	The maximum number of participants in a session. Default value is 5.	Optional	57.0
scheduleDays	Integer	The number of days in a week when the benefit schedule is executed.	Optional	57.0
scheduleEndDate	String	The date when the benefit schedule ends.	Optional	57.0
scheduleFrequency	String	The frequency at which the benefit schedule is executed.	Optional	57.0
totalReumenesCunt	Integer	The number of times the benefit schedule is executed.	Optional	57.0

## **Response body for POST**

Preview Benefit Sessions Output

## Benefit Disbursement Field Set API Names

Retrieve the API names of the field sets associated with a benefit disbursement object.

#### Resource

/connect/fieldset/\${objectName}

## Resource example

#### **Available version**

59.0

#### **HTTP** methods

GET

## **Response body for GET**

Field Sets Output

## Case Programs (POST)

Create case programs.

#### Resource

/connect/program-mgmt/case-programs/\${caseId}

#### **Example URI**

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/program-mgmt/case-programs/${caseId}
```

#### **Available version**

57.0

#### **HTTP** methods

POST

#### **Request body for POST**

#### JSON example

```
{
  "caseProgramRequest": {
    "programIds": [
        "11Wxx0000004F0WEAU",
        "11Wxx0000004F0WEBQ"
    ]
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version	
caseProgramRe	quest String[]	The list of case programs to be added.	Required	57.0	

## **Response body for POST**

Case Programs Output

## **Gift Transactions**

Get gift transactions associated with a gift commitment record.

#### Resource

```
/\texttt{connect/fundraising/gift-commitments/\$} \{ \textit{commitmentId} \} / \texttt{gift-transactions}
```

## **Resource examples**

https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/gift-commitments/6gcxx000004WhIIAA0/gift-transactions

https://portinstame.salesfore.cov/services/bita/65.0/correct/findaising/giff-cominents/6px00004WIAA/cjiff-transactions.cort=ApericalPertAfrontate=223-62-11113x5:23.0002

## Available version

59.0

#### **HTTP** methods

GET

## **Query parameters for GET**

Parameter Name	Туре	Description	Required or Optional	Available Version
count	Integer	Number of gift transactions to be retrieved.	Optional	59.0
		You can get a maximum of 12 transactions in one request.		
		By default, the API returns 12 transactions.		
fromDate	String	Date (yyyy-MM-dd'T'HH:mm:ss.SSSX) from when you want to get the transactions. This field is not applicable if period is Recent.	Optional	59.0
period	String	Period for getting gift transactions. possible values are:	Optional	59.0
		• Future		
		• Past		
		• Recent		
		The default period is Future.		
status	String[]	Comma-separated list of gift-transactions statuses. Possible values are:	Optional	59.0
		• Canceled		
		• Failed		
		<ul> <li>Fully Refunded</li> </ul>		
		• Paid		
		• Unpaid		
		• Written-Off		
		The default status is Unpaid.		

## **Response body for GET**

Gift Transactions Output

## **Gift Transaction Designations**

Get designations associated with a gift transaction, campaign, commitment, or opportunity.

Ø

**Note:** When there are no designations associated with a gift transaction, campaign, commitment, or opportunity, the API returns the organization-wide default designations.

#### Resource

/connect/fundraising/transaction/\${transactionId}/designations

#### Resource example

https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/transaction/6trRM00000007XYAQ/designations

#### **Available version**

59.0

#### **HTTP** methods

**GET** 

## **Response body for GET**

Gift Transaction Linked Designations Output

#### Gift Commitment Transactions

Get a list of gift transactions associated with a gift commitment for a donor account.

#### Resource

/connect/fundraising/donor/\${donorId}/commitments

#### Resource example

https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/donor/001xx000003GYOpAAO/commitments

#### **Available version**

59.0

#### **HTTP** methods

**GET** 

#### **Response body for GET**

Gift Commitment Transaction Matching Output

## **Gift Commitment Default Designations**

Get default designations associated with a gift commitment.

#### Resource

/connect/fundraising/commitment/\${commitmentId}/default-designations

## Resource example

https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/commitment/6trRM00000007XYAQ/default-designations

#### **Available version**

59.0

### **HTTP** methods

**GET** 

## **Response body for GET**

Gift Commitment Default Designations Output

## Gift Campaign Default Designations

Get default designations associated with a gift campaign.

#### Resource

 $/{\tt connect/fundraising/campaign/\$} \{ \textit{\it campaignId} \} / {\tt default-designations}$ 

#### Resource example

https://yourInstance.salesforce.com/services/data/v63.0/connect/fundraising/carpaign/701RM00000FhntYAC/default-designations

#### **Available version**

59.0

#### **HTTP** methods

**GET** 

#### **Response body for GET**

Gift Campaign Default Designations Output

## Program Enrollments (POST)

Enroll participants in a program.

#### Resource

/connect/program-mgmt/programs/\${programId}/enrollments

## **Example URI for POST**

 $\label{local_services} https://\textbf{yourInstance}. sales force.com/services/data/v63.0/connect/program-mgmt/programs/11Wxx0000004F3kEAE/enrollments$ 

#### **Available version**

57.0

#### **HTTP** methods

POST

## **Request body for POST**

#### Root XML tag

<ProgramEnrollmentsInputRepresentation>

### **Properties**

Name	Туре	Description	Required or Optional	Available Version
enrollees	Program Enrollment Input[]	The list of program enrollments that need to be added or updated.	Required	57.0
		For POST, the enrollments you want to add can either be a contact or an account.		
		For PUT, specify the program enrollments that need to be updated.		

## JSON example

## **Response body for POST**

Program Enrollments Output

## Program Enrollments (PUT)

Update program enrollments.

#### Resource

/connect/program-mgmt/programs/\${programId}/enrollments

## **Example URI for PUT**

https://**yourInstance**.salesforce.com/services/data/v63.0/connect/program-mgmt/programs/11Wxx0000004F3kEAE/enrollments

#### **Available version**

57.0

#### **HTTP** methods

PUT

## **Request body for PUT**

## Root XML tag

<ProgramEnrollmentsInputRepresentation>

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
enrollees	Program Enrollment Input[]	The list of program enrollments that need to be added or updated.	Required	57.0
		For POST, the enrollments you want to add can either be a contact or an account.		
		For PUT, specify the program enrollments that need to be updated.		

#### JSON example

```
"enrollees": {
  "enrolleeList": [
     "id": "11Xxx0000004Gz5EAE",
     "status": "Enrolled",
      "endDate": "2025-05-11T13:05:23.000Z"
   },
      "id": "11Xxx0000004Gz6EAE",
      "status": "Enrolled",
      "startDate": "2023-02-11T13:05:23.000Z",
      "endDate": "2024-01-12T13:05:23.000Z"
   },
     "id": "11Xxx0000004Gz7EAE",
      "status": "Enrolled",
     "startDate": "2023-02-11T13:05:23.000Z",
      "applicationDate": "2023-02-11T13:05:23.000Z"
   },
      "id": "11Xxx0000004Gz9EAE",
     "status": "Enrolled",
      "endDate": "2024-01-11T13:05:23.000Z",
      "applicationDate": "2023-02-12T13:05:23.000Z"
 ]
```

#### Response body for PUT

**Program Enrollments Output** 

## Requests

Here's a list of Program Management Business API request bodies.

#### Benefit Disbursements Input

Input representation of the request to create benefit disbursements.

#### Benefit Schedule Participants Input

Input representation of the request to add participants to a benefit schedule.

## Benefit Session Participants Input

Input representation of the request to add participants to a benefit session.

#### Case Programs Input

Input representation of the request to add case programs to a benefit session.

## Preview Benefit Session Input

Input representation of the benefit scheduling session preview request.

## Program Enrollment Input

Input representation of the enrollee for the program.

## Program Enrollments Input

Input representation of the request to enroll or update participants in a program.

## Benefit Disbursements Input

Input representation of the request to create benefit disbursements.

#### Root XML tag

<BenefitDisbursementsInputRepresentation>

#### JSON example

```
{
  "enrollees": {
     "enrolleeList": [
         "003T1000001U6axIAC"
     ]
  },
  "quantity": 2.5,
  "status": "Enrolled",
  "disbursementDate": "2022-12-18T14:30:00.000"
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
disbursementDate	String	The date on which the benefit is disbursed.	Required	57.0
enrollees	String[]	The list of enrollees who will receive the benefit disbursement. The enrollee can either be a contact or an account.	Required	57.0
quantity	Double	The quantity of the benefit to be disbursed.	Required	57.0
status	String	The status of the benefit disbursement.	Required	57.0

## Benefit Schedule Participants Input

Input representation of the request to add participants to a benefit schedule.

## **Root XML tag**

<BenefitScheduleParticipantsInputRepresentation>

## JSON example

```
{
  "enrollees": {
    "enrolleeList": [
        "003xx000004WhKeAAK"
```

```
]
}
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit schedule. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

## Benefit Session Participants Input

Input representation of the request to add participants to a benefit session.

## Root XML tag

<BenefitSessionParticipantsInputRepresentation>

## JSON example

```
{
  "enrollees": {
    "enrolleeList": [
        "003xx000004WhKeAAK"
    ]
  }
}
```

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
enrollees	String[]	The list of enrollees to be added to a benefit session. The enrollee can either be a contact, an account, or a program enrollment.	Required	57.0

## Case Programs Input

Input representation of the request to add case programs to a benefit session.

## JSON example

```
{
  "caseProgramRequest": {
    "programIds": [
        "11Wxx0000004F0WEAU",
        "11Wxx0000004F0WEBQ"
```

```
]
}
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
caseProgramRequest	: String[]	The list of case programs to be added.	Required	57.0

## **Preview Benefit Session Input**

Input representation of the benefit scheduling session preview request.

## **Root XML tag**

<PreviewBenefitSessionInputRepresentation>

#### JSON example

```
"benefitScheduleName": "Nov Weekday schedule",
"firstSessionStartDate": "2022-11-14T14:30:00.000",
"firstSessionEndDate": "2022-11-14T15:00:00.000",
"scheduleFrequency": "Weekly",
"scheduleDays": 96,
"mode": "dryRun",
"noOfSessions": 5,
"totalRecurrencesCount": 10
}
```

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
benefitScheduleName	String	The name of the benefit schedule.	Required	57.0
firstSessianFndDate	String	The date and time when the first session ends in the benefit schedule.	Required	57.0
firstSessionStartDate	String	The date and time when the first session starts in the benefit schedule.	Required	57.0
mode	String	The mode of the benefit schedule. The dryRun mode indicates that no data is created.	Optional	57.0
noOfSessions	Integer	The maximum number of participants in a session. Default value is 5.	Optional	57.0
scheduleDays	Integer	The number of days in a week when the benefit schedule is executed.	Optional	57.0
scheduleEndDate	String	The date when the benefit schedule ends.	Optional	57.0

Name	Туре	Description	Required or Optional	Available Version
scheduleFrequency	String	The frequency at which the benefit schedule is executed.	Optional	57.0
totalRecurrencesCount	Integer	The number of times the benefit schedule is executed.	Optional	57.0

## **Program Enrollment Input**

Input representation of the enrollee for the program.

## Root XML tag

<ProgramEnrollmentsDTO>

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
applicationDate	String	The date when the enrollee applied to the program.	Optional	57.0
endDate	String	The end date of the enrollment in the program.	Optional	57.0
id	String	The ID of the enrollee record. The enrollee can either be a contact or an account.	Required	57.0
startDate	String	The start date of the enrollment in the program.	Optional	57.0
status	String	The enrollment status of the enrollee for the program.	Optional	57.0

## **Program Enrollments Input**

Input representation of the request to enroll or update participants in a program.

## Root XML tag

<ProgramEnrollmentsInputRepresentation>

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
enrollees	Program Enrollment Input[]	The list of program enrollments that need to be added or updated.	Required	57.0
		For POST, the enrollments you want to add can either be a contact or an account.		

Name	Туре	Description	Required or Optional	Available Version
		For PUT, specify the program enrollments that need to be updated.		

## Responses

Here's a list of Program Management Business API response bodies.

#### Benefit Disbursements Output

Output representation of the request to create benefit disbursements.

#### Benefit Schedule Participants Output

Output representation of the request to add participants to a benefit schedule.

#### Benefit Session Participants Output

Output representation of the request to add participants to a benefit session.

#### **Benefit Sessions**

Output representation of the benefit sessions that are generated for preview.

#### Case Programs Output

Output representation of the request to add case programs to a benefit session.

#### Field Sets Output

Output representation of field sets of a benefit disbursement object.

#### Field Set Output

Output representation of the details of a field set.

#### Generate Benefit Session Output

Output representation of the request to create a benefit schedule session.

#### Preview Benefit Sessions Output

Output representation of the benefit scheduling session preview request.

## Program Enrollments Output

Output representation of the request to enroll or update participants in a program.

#### Gift Transactions Output

Output representation of the gift transactions associated with a gift commitment record.

#### Gift Transaction Record Output

Output representation of a gift transaction record.

#### Gift Transaction Linked Designations Output

Output representation of a list of gift designations.

#### Gift Designation Record Output

Output representation of a gift designation record.

#### Gift Commitment Transaction Matching Output

Output representation of a list of gift transactions.

Standard Object Details

Output representation of the details of gift transactions.

Standard Field Details

Output representation of the field attributes in a gift transaction object.

Gift Commitment Default Designation Record Output

Output representation of a default designation record associated with a gift commitment.

Gift Commitment Default Designations Output

Output representation of a list of default designations associated with a gift commitment.

Gift Campaign Default Designation Record Output

Output representation of a default designation record associated with a gift campaign.

Gift Campaign Default Designations Output

Output representation of a list of default designations associated with a gift campaign record.

## Benefit Disbursements Output

Output representation of the request to create benefit disbursements.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (true) or not (false).	Small, 57.0	57.0

## Benefit Schedule Participants Output

Output representation of the request to add participants to a benefit schedule.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (true) or not (false).	Small, 57.0	57.0

## Benefit Session Participants Output

Output representation of the request to add participants to a benefit session.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0

Property Name	Туре	Description	Filter Group and Version	Available Version
success	Boolean	Indicates whether the request was successful (true) or not (false).	Small, 57.0	57.0

## **Benefit Sessions**

Output representation of the benefit sessions that are generated for preview.

Property Name	Туре	Description	Filter Group and Version	Available Version
endDate	String	The end date and time of the benefit session.	Small, 57.0	57.0
name	String	The name of the benefit session.	Small, 57.0	57.0
startDate	String	The start date and time of the benefit session.	Small, 57.0	57.0

## Case Programs Output

Output representation of the request to add case programs to a benefit session.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (true) or not (false).	Small, 57.0	57.0

## Field Sets Output

Output representation of field sets of a benefit disbursement object.

## JSON example

```
"fieldSets": [
    "description": "FS1",
    "fieldSetApiName": "FS1_API",
    "fieldSetName": "FS1"
},
    {
    "description": "FS2",
    "fieldSetApiName": "FS2_API",
    "fieldSetName": "FS2"
},
```

```
{
   "description": "FS3",
   "fieldSetApiName": "FS3_API",
   "fieldSetName": "FS3"
}
],
   "objectName": "BenefitDisbursement"
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
fieldSets	Field Set Output[]	List of field sets of the benefit disbursement object.	Small, 59.0	59.0
objectName	String	Name of the benefit disbursement object whose field sets you want to retrieve.	Small, 59.0	59.0

## Field Set Output

Output representation of the details of a field set.

Property Name	Туре	Description	Filter Group and Version	Available Version
description	String	Description of the field set.	Small, 59.0	59.0
fieldSetApiName	String	API name of the field set.	Small, 59.0	59.0
fieldSetName	String	Name of the field set.	Small, 59.0	59.0

## Generate Benefit Session Output

Output representation of the request to create a benefit schedule session.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (true) or not (false).	Small, 57.0	57.0

## **Preview Benefit Sessions Output**

Output representation of the benefit scheduling session preview request.

Property Name	Туре	Description	Filter Group and Version	Available Version
sessions	Benefit Sessions[]	Specifies the list of the benefit sessions that have been returned for preview.	Small, 57.0	57.0

## **Program Enrollments Output**

Output representation of the request to enroll or update participants in a program.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 57.0	57.0
success	Boolean	Indicates whether the request was successful (true) or not (false).	Small, 57.0	57.0

## **Gift Transactions Output**

Output representation of the gift transactions associated with a gift commitment record.

## **JSON** examples

Here's an example of a list of future gift transactions.

Here's an example of a list of past gift transactions.

```
"paymentMethod":"Cash",
    "status":"Canceled"
},
{
    "amount":2099,
     "commitmentId":"6gcxx000004WhULAA0",
     "commitmentScheduleId":"6csxx000004UhUMAB0",
     "paymentMethod":"Cash",
     "status":"Canceled"
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
gift Transactions	Gift Transaction Record Output[]	List of gift transactions associated with a gift commitment record.	Small, 59.0	59.0

## Gift Transaction Record Output

Output representation of a gift transaction record.

Property Name	Туре	Description	Filter Group and Version	Available Version
amount	Double	Transaction amount.	Small, 59.0	59.0
commitmentId	String	ID of the gift commitment record.	Small, 59.0	59.0
commitment ScheduleId	String	ID of the gift commitment schedule record.	Small, 59.0	59.0
paymentMethod	String	Mode of payment for the transaction.	Small, 59.0	59.0
status	String	Status of the transaction.  This field is not applicable for future transactions.	Small, 59.0	59.0
transaction Date	String	Payment due date. This field is applicable only for future transactions.	Small, 59.0	59.0

## Gift Transaction Linked Designations Output

Output representation of a list of gift designations.

## JSON example

```
"amount":100,
    "designationId":"6gdRM00000000LYAQ",
    "percent":100
},
{
    "amount":100,
    "designationId":"6gcxx000004WhULAA0",
    "percent":50
}
]
```

Property Name	Туре	Description	Filter Group and Version	Available Version
tastiolidelesigation	Gift Designation Record Output[]	List of designations.	Small, 59.0	59.0

## Gift Designation Record Output

Output representation of a gift designation record.

Property Name	Туре	Description	Filter Group and Version	Available Version
amount	Double	Amount value of the designation record.	Small, 59.0	59.0
designationId	String	ID of the designation record.	Small, 59.0	59.0
percent	Double	Percentage value of the designation record.	Small, 59.0	59.0

## Gift Commitment Transaction Matching Output

Output representation of a list of gift transactions.

## JSON example

```
"fieldApiName": "Name",
   "label": "Name",
   "type": "String",
   "value": "Tom C3 - Tom C3 GT 7"
},
   "fieldApiName": "GiftType",
   "label":"Gift Type",
   "type": "String",
   "value": "Individual"
},
   "fieldApiName": "TransactionDueDate",
   "label": "Transaction Due Date",
   "type": "DateOnlyWrapper",
   "value":"Thu Aug 31 00:00:00 GMT 2023"
},
   "fieldApiName": "DonorId",
   "label": "Donor ID",
   "type": "String",
   "value":"001RM000005bZRUYA2"
},
   "fieldApiName": "OwnerId",
   "label": "Owner ID",
   "type": "String",
   "value":"005RM0000027gL8YAI"
},
   "fieldApiName": "RefundedAmount",
   "label": "Refunded Amount",
   "type": "Double",
   "value":"0.0"
},
   "fieldApiName": "Status",
   "label": "Status",
   "type": "String",
   "value": "Unpaid"
},
   "fieldApiName": "IsDeleted",
   "label": "Deleted",
   "type": "Boolean",
   "value":"false"
},
   "fieldApiName": "IsPartiallyRefunded",
   "label": "Partially Refunded",
   "type": "Boolean",
   "value":"false"
},
```

```
"fieldApiName": "CurrentAmount",
         "label": "Current Amount",
         "type": "Double",
         "value":"2.222222E7"
      },
         "fieldApiName": "AcknowledgementStatus",
         "label": "Acknowledgement Status",
         "type": "String",
         "value": "To Be Sent"
      },
         "fieldApiName": "OriginalAmount",
         "label": "Original Amount",
         "type": "Double",
         "value":"2.222222E7"
      },
         "fieldApiName":"IsWrittenOff",
         "label":"Written Off",
         "type": "Boolean",
         "value":"false"
      },
         "fieldApiName": "IsFullyRefunded",
         "label": "Fully Refunded",
         "type": "Boolean",
         "value":"false"
      },
         "fieldApiName": "PaymentMethod",
         "label": "Payment Method",
         "type": "String",
         "value": "Cash"
      },
         "fieldApiName": "IsPaid",
         "label": "Paid",
         "type": "Boolean",
         "value":"false"
   "objectApiName": "GiftTransaction"
},
   "fields":[
         "fieldApiName": "GiftCommitmentId",
         "label": "Gift Commitment ID",
         "type": "String",
         "value":"6gcRM0000004CD0YAM"
      },
      {
```

```
"fieldApiName":"Id",
   "label": "Gift Transaction ID",
   "type": "String",
   "value":"6trRM00000000CxYAI"
},
   "fieldApiName": "Name",
   "label": "Name",
   "type": "String",
   "value": "Tom C3 - Tom C3 GT 6"
},
   "fieldApiName": "GiftType",
   "label": "Gift Type",
   "type": "String",
   "value": "Individual"
},
   "fieldApiName": "TransactionDueDate",
   "label": "Transaction Due Date",
   "type": "DateOnlyWrapper",
   "value":"Wed Aug 30 00:00:00 GMT 2023"
},
   "fieldApiName": "DonorId",
   "label": "Donor ID",
   "type": "String",
   "value": "001RM000005bZRUYA2"
},
   "fieldApiName": "OwnerId",
   "label": "Owner ID",
   "type": "String",
   "value": "005RM0000027qL8YAI"
},
   "fieldApiName": "RefundedAmount",
   "label": "Refunded Amount",
   "type": "Double",
   "value":"0.0"
},
   "fieldApiName": "Status",
   "label": "Status",
   "type": "String",
   "value":"Unpaid"
},
   "fieldApiName": "IsDeleted",
   "label": "Deleted",
   "type": "Boolean",
   "value":"false"
},
{
```

```
"fieldApiName": "IsPartiallyRefunded",
                "label": "Partially Refunded",
                "type": "Boolean",
                "value":"false"
            },
               "fieldApiName": "CurrentAmount",
                "label": "Current Amount",
                "type": "Double",
                "value":"11111.0"
            },
                "fieldApiName": "AcknowledgementStatus",
                "label": "Acknowledgement Status",
                "type": "String",
                "value": "To Be Sent"
            },
                "fieldApiName": "OriginalAmount",
               "label": "Original Amount",
                "type": "Double",
                "value":"11111.0"
            },
               "fieldApiName": "IsWrittenOff",
               "label":"Written Off",
                "type": "Boolean",
                "value":"false"
            },
                "fieldApiName": "IsFullyRefunded",
                "label": "Fully Refunded",
                "type": "Boolean",
                "value":"false"
            },
                "fieldApiName": "PaymentMethod",
               "label": "Payment Method",
               "type": "String",
                "value": "Cash"
            },
               "fieldApiName": "IsPaid",
               "label": "Paid",
                "type": "Boolean",
                "value":"false"
         "objectApiName": "GiftTransaction"
  ]
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
giftTransactions	Standard Object Details[]	List of gift transactions associated with a gift commitment.	Small, 59.0	59.0

### Standard Object Details

Output representation of the details of gift transactions.

Property Name	Туре	Description	Filter Group and Version	Available Version
fields	Standard Field Details[]	List of gift transaction fields.	Small, 59.0	59.0
objectApiName	String	API name of the gift transaction.	Small, 59.0	59.0

#### Standard Field Details

Output representation of the field attributes in a gift transaction object.

Property Name	Туре	Description	Filter Group and Version	Available Version
fieldApiName	String	API name of a field in the gift transaction object.	Small, 59.0	59.0
label	String	Label of a field in the gift transaction object.	Small, 59.0	59.0
type	String	Type of a field in the gift transaction object.	Small, 59.0	59.0
value	String	Value of a field in the gift transaction object.	Small, 59.0	59.0

### Gift Commitment Default Designation Record Output

Output representation of a default designation record associated with a gift commitment.

Property Name	Туре	Description	Filter Group and Version	Available Version
designationId	String	ID of the default gift designation record.	Small, 59.0	59.0
percentage	Double	Percentage value of the default gift designation record.	Small, 59.0	59.0

### Gift Commitment Default Designations Output

Output representation of a list of default designations associated with a gift commitment.

#### JSON example

Property Name	Туре	Description	Filter Group and Version	Available Version
comine the falthesigations		List of default gift designations associated with a gift commitment.	Small, 59.0	59.0

### Gift Campaign Default Designation Record Output

Output representation of a default designation record associated with a gift campaign.

Property Name	Туре	Description	Filter Group and Version	Available Version
designationId	String	ID of the default gift designation record.	Small, 59.0	59.0
percentage	Double	Percentage value of the default gift designation record.	Small, 59.0	59.0

### Gift Campaign Default Designations Output

Output representation of a list of default designations associated with a gift campaign record.

#### JSON example

Property Name	Туре	Description	Filter Group and Version	Available Version
capaig Tefault Tesigetions	, ,	List of default gift designations associated with a gift campaign record.	Small, 59.0	59.0

# **CHAPTER 5** Case Management

### In this chapter ...

- Case Management Standard Objects
- Case Management Business API

This guide provides objects and API information about Case Management for Nonprofits. Built on the platform, Case Management helps case managers assist participants in achieving their goals through individualized plans, collaborative tools, and full participant data.

### **EDITIONS**

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

## Case Management Standard Objects

Case Management data model provides objects and fields to manage cases and care plans for your nonprofit organization.

#### CarePlan

Represents an instantiation of a care plan template for a particular individual in order to reach specific goals. This object is available in API version 55.0 and later.

#### CarePlanTemplate

Represents the template for a type of care plan that can be offered for a household scenario. This object is available in API version 55.0 and later.

#### CarePlanTemplateBenefit

Represents a junction between a care plan template and a benefit. This object stores the benefit details of a care plan. This object is available in API version 55.0 and later.

#### CarePlanTemplateGoal

Represents a junction between a care plan template and a goal definition. This object stores the goal details of a care plan template. This object is available in API version 55.0 and later.

#### CaseParticipant

Represents a junction between a case, and an account or a contact. This object stores the details of the participant associated with a case. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

#### ComplaintCase

Represents the association between a public complaint and its corresponding case. This object is available in API version 52.0 and later.

#### ComplaintParticipant

Represents a junction between a public complaint, and an account or a contact. This object stores the details of the participant who registers a complaint with the authorities. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

#### GoalAssignment

Represents the assignment of a goal. This object is available in API version 55.0 and later.

#### GoalDefinition

The definition of a care plan goal in the reusable PGI library that's a part of Integrated Care Management. When instantiated, GoalDefinition records create GoalAssignment records that serve as goals in care plans. This object is available in API version 57.0 and later.

#### 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.

#### InteractionAttendee

Represents an attendee of an interaction.

#### InteractionRelatedAccount

Represents a junction between an interaction and account that's related to that interaction.

#### InteractionSummary

Represents the summary of an interaction, including confidentiality information.

### **EDITIONS**

Available in: Lightning Experience

Available in: **Enterprise** and **Unlimited** Editions.

Case Management CarePlan

#### InteractionSumDiscussedAccount

Represents information about the companies discussed in an interaction.

#### PublicComplaint

Represents the complaints submitted by public users. This object is available in API version 49.0 and later.

Represents the information on client referrals in an organization. This object is available in API version 56.0 and later.

### CarePlan

Represents an instantiation of a care plan template for a particular individual in order to reach specific goals. 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 Calls**

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

Field	Details
CarePlanTemplateId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The care plan template associated with the care plan.
	This is a relationship field.
	<b>Relationship Name</b> CarePlanTemplate
	Relationship Type Lookup
	Refers To  CarePlanTemplate
CaseId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The case associated with the care plan.

Case Management CarePlan

This is a relationship field.
Relationship Name
Case
Relationship Type Master-Detail
Refers To Case
<b>Type</b> reference
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
The outcome of a legal case for a participant.
This field is a relationship field.
Available with a Public Sector Solutions license and in API version 58.0 and later.
Relationship Name CaseProceedingResult
Relationship Type Lookup
Refers To  CaseProceedingResult
<b>Type</b> reference
<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
<b>Description</b> The claim with which the care plan is associated.
Available with a Public Sector Solutions license and in API version 59.0 and later.
This field is a relationship field.
Relationship Name Claim
Relationship Type
Lookup
<b>Refers To</b> Claim
<b>Type</b> textarea

Case Management CarePlan

Field	Details
	Properties
	Create, Nillable, Update
	<b>Description</b> The description for the care plan record.
EndDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date until when the care plan is effective.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user referenced this record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user viewed this record.
Name	Туре
	string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the care plan record.
ParticipantId	Туре
	reference
	Properties  Croate Filter Croup Sort Hodate
	Create, Filter, Group, Sort, Update
	Description The account associated with the care plan
	The account associated with the care plan.
	This is a polymorphic relationship field.

Case Management CarePlan

Field	Details
	Relationship Name
	Participant
	Relationship Type Lookup
	Refers To Account, Contact
StartDate	<b>Type</b> dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date from when the care plan is effective.
Status	<b>Type</b> picklist
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Specifies the status of the care plan.
	Possible values are:
	• Active
	• Cancelled
	• Completed
	• Draft
	• Proposed
TaskJobStatus	<b>Type</b> picklist
	Properties
	Filter, Group, Nillable, Restricted picklist, Sort
	Description
	Specifies the status of the task in the task queue.
	Possible values are:
	• Completed
	• Failed
	• InProgress
	• Submitted

Case Management CarePlanTemplate

Field	Details
TaskJobStatusMessage	Туре
	textarea
	Properties
	Nillable
	Description
	The message that describes the status of the task in the queue.

### **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.

#### CarePlanFeed

Feed tracking is available for the object.

#### CarePlanHistory

History is available for tracked fields of the object.

## CarePlanTemplate

Represents the template for a type of care plan that can be offered for a household scenario. 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()

Field	Details
Description	<b>Type</b> textarea
	Properties Create, Nillable, Update
	Description  The description of the care plan template record.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort

Case Management CarePlanTemplate

Field	Details
	<b>Description</b> The most recent date on which a user referenced this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user viewed this record.
Name	<b>Type</b> string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the care plan template record.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the care plan template record owner.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
Status	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the status of the care plan template.
	Possible values are:
	• Draft
	• Inactive
	• Published

Case Management CarePlanTemplateBenefit

Field	Details
	The default value is 'Draft'.

## CarePlanTemplateBenefit

Represents a junction between a care plan template and a benefit. This object stores the benefit details of a care plan. This object is available in API version 55.0 and later.



(1) 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 Calls**

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

Field	Details
BenefitId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	Description
	The name of the care plan template benefit record.
	This is a relationship field.
	<b>Relationship Name</b> Benefit
	<b>Relationship Type</b> Lookup
	Refers To  Benefit
CarePlanTemplateId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The care plan template associated with the care plan template benefit.
	This is a relationship field.
	<b>Relationship Name</b> CarePlanTemplate

Case Management CarePlanTemplateBenefit

Field	Details
	Relationship Type Master-Detail
	Refers To  CarePlanTemplate
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user referenced this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user viewed this record.
Name	<b>Type</b> string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the care plan template benefit record.
Priority	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the priority of the care plan template benefit.
	Possible values are:
	• High
	• Low
	• Medium

Case Management CarePlanTemplateGoal

## CarePlanTemplateGoal

Represents a junction between a care plan template and a goal definition. This object stores the goal details of a care plan template. This object is available in API version 55.0 and later.



(1) 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 Calls**

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

Field	Details
CarePlanTemplateId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The care plan template associated with the care plan template goal.
	This is a relationship field.
	Relationship Name CarePlanTemplate
	Relationship Type  Master-Detail
	<b>Refers To</b> CarePlanTemplate
GoalDefinitionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The goal definition associated with the care plan template goal.
	This is a relationship field.
	Relationship Name GoalDefinition
	Relationship Type Lookup
	Refers To  Goal Definition

Field	Details
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user referenced this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user viewed this record.
Name	<b>Type</b> string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	Description
	The name of the care plan template goal.
Priority	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the priority of the care plan template goal.
	Possible values are:
	• High
	• Low
	• Medium

## CaseParticipant

Represents a junction between a case, and an account or a contact. This object stores the details of the participant associated with a case. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 and later.

(1) 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 Calls**

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

Field	Details
AuthorizationProof	<b>Type</b> picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> How the participant communicated their consent. This field is available in API version 58.0 and later.
	Possible values are:
	• Email Consent
	• Joint Ownership
	• Power of Attorney
	• Verbal Consent
CaseId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The case associated with the case participant record.
	This field is a relationship field.
	Relationship Name Case
	Relationship Type  Master-Detail
	Refers To Case
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user referenced this record.

Field	Details
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user viewed this record.
Name	<b>Type</b> string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the case participant record.
ParticipantId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The participant associated with the case participant record.
	This field is a polymorphic relationship field.
	Relationship Name Participant
	Relationship Type Lookup
	Refers To Account, Contact
PreferredCallTimeFrom	<b>Type</b> time
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The start of the preferred time window for contacting the participant. This field is available in API version 58.0 and later.
PreferredCallTimeTo	<b>Type</b> time
	Properties Create, Filter, Nillable, Sort, Update

Field Details

#### Description

The end of the preferred time window for contacting the participant. This field is available in API version 58.0 and later.

PreferredCommunicationMode

#### Type

picklist

#### **Properties**

Create, Filter, Group, Nillable, Sort, Update

#### Description

How the participant prefers to receive messages. This field is available in API version 58.0 and later.

Possible values are:

- Email
- Phone
- SMS

Role

#### Type

picklist

#### **Properties**

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

#### Description

Specifies the role of the case participant.

Possible values are:

- Applicant
- Inspection Officer
- Lawyer
- Observer
- Perpetrator
- Primary Caretaker
- Victim

The default value is Applicant.

Status

#### Type

picklist

#### **Properties**

Create, Filter, Group, Sort, Update

#### Description

Specifies the status of the case participant.

Possible values are:

• Active

Case Management ComplaintCase

Field	Details
	• Inactive

## ComplaintCase

Represents the association between a public complaint and its corresponding case. This object is available in API version 52.0 and later.

When a public complaint is raised on the portal, multiple department could be involved and each department can create a case record to track how the complaint is handled. For example, a hazardous chemical complaint can be handled by both the environmental agency and the fire department.

## Supported Calls

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

Details
<b>Type</b> reference
<b>Properties</b> Create, Filter, Group, Sort, Update
<b>Description</b> The name of the case that is associated with the complaint.
This is a relationship field.
Relationship Name Case
Relationship Type Lookup
Refers To Case
<b>Type</b> dateTime
<b>Properties</b> Filter, Nillable, Sort
<b>Description</b> The most recent date on which a user referenced this record.
<b>Type</b> dateTime

Case Management ComplaintCase

Field	Details
	Properties
	Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user viewed this record.
Name	<b>Type</b> string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The ID of the complaint being raised.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the complaint case record owner.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
PublicComplaintId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort, Update
	Description
	The name of the public complaint that is associated to the complaint being raised.
	This is a relationship field.
	Relationship Name PublicComplaint
	Relationship Type Lookup
	Refers To PublicComplaint

Case Management ComplaintParticipant

## ComplaintParticipant

Represents a junction between a public complaint, and an account or a contact. This object stores the details of the participant who registers a complaint with the authorities. This participant could be the applicant, co-applicant, a household, or even a business account. This object is available in API version 54.0 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.

When Compliant Data Sharing is enabled for the Public Complaint object, a complaint participant represents information about a user or group of participants who have access to a public complaint.

### **Supported Calls**

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

Field	Details
Comments	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The comments about why the participant has access to the public complaint.
	Available in API version 62.0 and later, when Compliant Data Sharing is enabled for the Public Complaint object.
IsActive	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Specifies whether the participant's association with the public complaint is active (true) or not (false).
	The default value is false.
	Available in API version 62.0 and later, when Compliant Data Sharing is enabled for the Public
	Complaint object.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort

Case Management ComplaintParticipant

Field	Details
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> 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	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the complaint participant record.
ParticipantId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort, Update
	<b>Description</b> The participant associated with the complaint participant record.
	This field is a polymorphic relationship field.
	Relationship Name Participant
	Refers To Account, Contact, Group, User
ParticipantRoleId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The participant role associated with the complaint participant record.
	This field is a relationship field.
	Available in API version 62.0 and later, when Compliant Data Sharing is enabled for the Public Complaint object.
	Relationship Name ParticipantRole

Case Management ComplaintParticipant

Field	Details
	Refers To ParticipantRole
PublicComplaintId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The public complaint associated with the complaint participant record.
	This field is a relationship field.
	Relationship Name PublicComplaint
	Relationship Type  Master-Detail
	Refers To PublicComplaint
Role	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the role of the complaint participant.
	Possible values are:
	• Observer
	• Perpetrator
	• Reporter
	• Victim
	The new Nillable property is available in API version 58.0 and later.
Status	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the complaint participant.
	Possible values are:
	• Active
	• Inactive
	The default value is Active.

### **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.

#### ComplaintParticipantFeed

Feed tracking is available for the object.

#### ComplaintParticipantHistory

History is available for tracked fields of the object.

## GoalAssignment

Represents the assignment of a goal. 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()

### **Special Access Rules**

This object is available if Program and Benefit Management is enabled in your org. To access the object, you need the Program and Benefit Management Access permission set or the Program and Benefit Management permission set license.

Field	Details
CompletionDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the goal is completed.
CompletionPercentage	<b>Type</b> percent
	Properties  Create, Defaulted on create, Filter, Nillable, Sort, Update
	<b>Description</b> Indicates the progress made on the assigned goal in percentage.
CustomGoalName	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> A custom name that can be defined for the goal assignment. If this field is empty, the goal definition name is used for the goal assignment.
	This field is available from API version 63.0 and later.
Description	<b>Type</b> textarea
	Properties Create, Nillable, Update
	<b>Description</b> The description of the goal assignment record.
GoalAssigneeId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The assigees associated with the goal assignment.
	This is a polymorphic relationship field.
	Relationship Name GoalAssignee
	<b>Relationship Type</b> Lookup
	Refers To Account, Contact
GoalDefinitionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The goal definition associated with the goal assignment.
	This is a relationship field.
	Relationship Name GoalDefinition
	Relationship Type  Lookup
	Refers To  Goal Definition

Field	Details
DescriptionCodeId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The system-defined code that represents the description of a standardized goal.
	This field is a polymorphic relationship field.
	Available in API version 61.0 and later.
	<b>Relationship Name</b> DescriptionCode
	Relationship Type Lookup
	Refers To CodeSet, CodeSetBundle
GoalType	<b>Type</b> string
	Properties Filter, Group, Nillable, Sort
	<b>Description</b> Specifies if the goal applies to a group or an individual.
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The most recent date on which a user referenced this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The most recent date on which a user viewed this record.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	<b>Description</b> The name of the goal assignment record.
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	Description  ID of the goal assignment record owner.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
ParentRecordId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The care plan or benefit assignment object associated with the goal assignment.
	This is a polymorphic relationship field.
	Relationship Name ParentRecord
	Relationship Type Lookup
	<b>Refers To</b> BenefitAssignment, CarePlan
Priority	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the priority of the goal assignment.
	Possible values are:
	• High
	• Low

Field	Details
	• Medium
StartDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The start date of the assigned goal.
Status	<b>Type</b> picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the assigned goal.
	Possible values are:
	• Canceled
	• Completed
	• In Progress
	• Not Started
	The default value is 'Not Started'.
TargetCompletionDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date by when the assigned goal is targeted to be completed.

### **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.

#### GoalAssignmentFeed

Feed tracking is available for the object.

#### GoalAssignmentHistory

History is available for tracked fields of the object.

#### ${\bf Goal Assignment Owner Sharing Rule}$

Sharing rules are available for the object.

Case Management GoalDefinition

#### Goal Assignment Share

Sharing is available for the object.

## GoalDefinition

The definition of a care plan goal in the reusable PGI library that's a part of Integrated Care Management. When instantiated, GoalDefinition records create GoalAssignment records that serve as goals in care plans. 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()

Field	Details
Category	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The category that the defined goal belongs to.
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The description of the defined goal.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date and time when the record was last referenced.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The date and time when the record was last viewed.

Case Management GoalDefinition

Field	Details
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the record.
OwnerId	Туре
	Polymorphic lookup
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The owner of the record.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Refers To
	<ul> <li>Group</li> </ul>
	• User
ParentGoalId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	This field is not used in Integrated Care Management.
	Relationship Name
	ParentGoal
	Relationship Type
	Lookup
	Refers To
	GoalDefinition
Status	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The status of the goal defintion. This value indicates whether the defintion is active or not,.
	Possible values are:

Field	Details
	• Active
	• Inactive
	The default value is Active.
Туре	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the type of the defined goal.
	Possible values are:
	<ul> <li>Individual—Intermediate Goal</li> </ul>
	• Strategic—Top Goal
	The default value is Individual.
UsageType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	This field is not used in Integrated Care Management.

## **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.

#### GoalDefinitionFeed

Feed tracking is available for the object.

#### GoalDefinitionHistory

History is available for tracked fields of the object.

#### GoalDefinitionShare

Sharing is available for 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.

## **Supported Calls**

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

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of the account related to the customer or partner who attended the interaction.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
Description	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The description of the interaction.
EndTime	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time that the interaction ended.
InteractionType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The type of interaction.  Possible values are:

Field	Details
	• Conference
	• Email
	• In Person
	• Phone Call
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastSyncedDateTime	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> 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	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> 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	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The location of the interaction.
	Relationship Name Location
	Relationship Type Lookup
	Refers To  Location

Field	Details
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> Required. The name of the interaction.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the record owner.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
ReferenceIdentifier	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Nillable, Sort, Update
	<b>Description</b> The unique reference ID of the interaction.
RelatedRecordId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The opportunity or financial deal associated with the interaction.
	This is a polymorphic relationship field.
	Relationship Name RelatedRecord
	Relationship Type Lookup
	Refers To FinancialDeal, Opportunity

Case Management InteractionAttendee

Field	Details
StartTime	Туре
	dateTime
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> 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

Feed tracking is available for the object.

#### InteractionHistory

History is available for tracked fields of the object.

#### Interaction Owner Sharing Rule

Sharing rules are available for the object.

#### InteractionShare

Sharing is available for the object.

### InteractionAttendee

Represents an attendee of an interaction.



(1) 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 Calls**

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

Field	Details
AttendeeResponse	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the response of the attendee to the interaction.

Case Management InteractionAttendee

Field	Details
	Possible values are:
	• Accepted
	• Declined
	Awaiting Response
AttendeeType	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The type of attendee.
	Possible values are:
	• External
	• Internal
ContactId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The contact who attended the interaction.
	Relationship Name
	Contact
	<b>Relationship Type</b> Lookup
	Refers To
	Contact
EmailAddress	Туре
	email
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The email address of the attendee.
EventId	<b>Type</b> reference
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The event on Salesforce calendar for this attendee.

Case Management InteractionAttendee

Field	Details
	Relationship Name
	Event
	<b>Relationship Type</b> Lookup
	Refers To Event
InteractionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Required. The interaction for which this attendee record is created.
	Relationship Name Interaction
	Relationship Type  Master-Detail
	Refers To Interaction
IsOrganizer	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the attendee is the interaction organizer (true) or not (false).
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastSyncedDateTime	Туре
	dateTime
	Properties Create, Filter, Nillable, Sort, Update

Case Management InteractionRelatedAccount

Field	Details
	<b>Description</b> 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	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> 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	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the interaction attendee.
UserId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> 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

Feed tracking is available for the object.

#### Interaction Attendee History

History is available for tracked fields of the object.

## InteractionRelatedAccount

Represents a junction between an interaction and account that's related to that interaction.

Case Management InteractionRelatedAccount

# **Supported Calls**

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

### **Fields**

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> 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
AccountRole	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the role of the account in the interaction.
	Possible values are:
	• Audit
	• Legal
	• Participating
	• Primary
Comment	Туре
	textarea
	<b>Properties</b> Create, Nillable, Update
	Description
	The description about the account that's associated with the interaction.

Case Management InteractionRelatedAccount

Field	Details
InteractionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Required. The interaction associated with the account.
	This field is a relationship field.
	Relationship Name Interaction
	Relationship Type Lookup
	Refers To Interaction
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> 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	Туре
	string
	<b>Properties</b> 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

Feed tracking is available for the object.

#### Interaction Related Account History

History is available for tracked fields of the object.

# InteractionSummary

Represents the summary of an interaction, including confidentiality information.

### **Supported Calls**

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

### **Fields**

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of the account related to the customer who attended the client interaction.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
ConfidentialityType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<ul> <li>Description         Specifies the level of confidentiality of the information that's recorded in this interaction summary.     </li> <li>Possible values are:         <ul> <li>Confidential</li> </ul> </li> </ul>
	• Public

Field	Details
InteractionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The client interaction related to the interaction summary.
	Relationship Name Interaction
	Relationship Type Lookup
	Refers To Interaction
InteractionPurpose	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the purpose of the client interaction.
	Possible values are:
	• Deal Execution
	• Meet and Greet
	• Quarterly Check-In
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> 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	<b>Type</b> textarea

Field	Details
	Properties
	Create, Nillable, Update
	<b>Description</b> The detailed record of what transpired during the client interaction.
MeetingNotesStatus	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the status of the meeting notes. Available in API version 61.0 and later.
	Possible values are:
	• No
	• Yes
Name	Туре
	string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> Required. The title of the interaction summary, capturing the summary of the interaction.
NextSteps	Туре
	textarea
	Properties
	Create, Nillable, Update
	<b>Description</b> The next steps that were decided during the interaction.
Offering	Туре
	multipicklist
	<b>Properties</b> Create, Filter, Nillable, Update
	<b>Description</b> The offerings that were discussed in the client interaction.
	Possible values are:
	Debt Capital Markets
	• Equity Capital Markets
	41 14 114 11 11 11

Field	Details
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the record owner.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
PartnerAccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of the account related to the partner who attended the client interaction.
	Relationship Name Partner Account
	Relationship Type  Lookup
	Refers To Account
RelatedRecordId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the record such as an opportunity associated with a client interaction.
	This is a polymorphic relationship field.
	Relationship Name RelatedRecord
	Relationship Type Lookup
	Refers To
	<ul> <li>Application Form - Available in API version 62.0 and later</li> <li>Benefit Assignment</li> </ul>

Field	Details
	Care Plan
	• Case
	Case Participant
	• Contact
	Complaint Participant
	Goal Assignment
	<ul> <li>Opportunity</li> </ul>
	Public Complaint
	Referral
	Service Appointment
	<ul> <li>Visit</li> </ul>
Status	Туре
	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

Feed tracking is available for the object.

#### InteractionSummaryHistory

History is available for tracked fields of the object.

#### Interaction Summary Owner Sharing Rule

Sharing rules are available for the object.

#### InteractionSummaryShare

Sharing is available for the object.

### InteractionSumDiscussedAccount

Represents information about the companies discussed in an interaction.

# **Supported Calls**

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

### **Fields**

Field	Details
Comment	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> Notes about the account that's associated with the interaction summary.
DiscussedAccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The company or organization mentioned in the interaction summary.
	This is a relationship field.
	Relationship Name DiscussedAccount
	Relationship Type Lookup
	Refers To Account
InteractionSummaryId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Required. The interaction summary associated with the interaction summary account record.
	This is a relationship field.
	Relationship Name InteractionSummary
	Relationship Type Lookup
	Refers To InteractionSummary

Field	Details
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> 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	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> 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.

#### Interaction Sum Discussed Account Feed

Feed tracking is available for the object.

#### Interaction Sum Discussed Account History

History is available for tracked fields of the object.

### **PublicComplaint**

Represents the complaints submitted by public users. This object is available in API version 49.0 and later.

### **Supported Calls**

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

# Fields

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> ID of the account associated with this complaint.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
BusinessAddress	<b>Type</b> textarea
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> Address of the business.
BusinessName	<b>Type</b> string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Name of the business
CauseSubtype	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The subtype of complaint cause. This field is available in API version 58.0 and later.
	Possible value is:
	Misleading advertisement or documentation
CauseType	<b>Type</b> picklist

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The type of complaint cause. This field is available in API version 58.0 and later.
	Possible value is:
	• Product Communication
Comments	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Additional details about the complaint. This field is available in API version 51.0 and later.
CompensationAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	Description
	Any amount of money offered to resolve the complaint. This field is available in API version 58.0 and later.
ComplaintCaseId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description This field is depressed as of API version 40.0
	This field is deprecated as of API version 49.0.
ComplaintCaseStatus	Туре
	picklist
	Properties
	Defaulted on create, Filter, Group, Nillable, Sort
	Description
	The status of the related Case. This field is available in API version 58.0 and later.
	Possible values are:
	• New
	<ul> <li>Working</li> </ul>
	• Escalated

Field	Details
	The default is New.
ComplaintSubType	Type picklist Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Subtype of the complaint.
	Possible values are:
	• Burns
	• Educational Neglect
	• Emotional Neglect
	• Exploitation
	• Fire Safety
	• Isolation
	• Medical Neglect
	• Physical Neglect
	Rough Treatment
	Sexual Activities
	Sexual Exploitation
	Sexual Exposure
	• Suffocation
	• Terror
ComplaintType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Type of complaint.
	Possible values are:
	• Mental Abuse
	• Neglect
	• Physical Abuse
	• Safety
	Sexual Abuse
Description	Туре
	textarea

Field	Details
	Properties
	Create, Nillable, Update
	<b>Description</b> Description of the complaint.
	Description is filterable and sortable in API version 61.0 and earlier.
Email	Туре
	email
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Email of the complainant.
EscalationCause	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The reason the complaint was escalated. This field is available in API version 58.0 and later.
	Possible values are:
	Alleged ADA Violation
	<ul> <li>Alleged Discrimination</li> </ul>
	Alleged MLA Violation
	Alleged SCRA Violation
	Alleged UDAAP Violation
	<ul> <li>Consumer Protection Agency Involvement</li> </ul>
	• Lawsuit Filed
	Media Involvement
	• None
	<ul> <li>Received by Executive Leadership</li> </ul>
	The default is None.
FirstName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	First name of the complainant.

Field	Details
IncidentDate	Туре
	date
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Date of the incident.
IsComplainantAuthorized	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Whether the person who filed the complaint is an authorized representative of the Account. This field is available in API version 58.0 and later.
	The default value is false.
IsReporterConfidential	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Reporter's request for confidentiality.
	The default value is false.
LastName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Last name of the complainant.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The most recent date that a user referenced this record.
LastViewedDate	Туре
	dateTime

Field	Details
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The most recent date that a user viewed this record.
MobileNumber	<b>Type</b> phone
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Mobile number of the complainant.
Name	Type string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort  Description Name of the complaint.
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the complaint owner.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
Priority	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Priority of the complaint.
	Possible values are:  Critical  High

Field	Details
	• Low
	• Medium
ProductType	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The product that the complaint is about. This field is available in API version 58.0 and later.
	Possible values are:
	ATM / debit card
	Credit Card or Prepaid Card
	• Insurance
	• Investments
	• Merchant Services
	<ul> <li>Mobile / electronic banking</li> </ul>
	<ul> <li>Money transfers, virtual currency, and money services</li> </ul>
	Mortgage / Home Finance
	• Other
	Personal Loan / other loans
	• Vehicle loan or lease
ReceivedDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date the complaint was received. This field is available in API version 58.0 and later.
ReporterAddress	Туре
	textarea
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	Address of the reporter for further communication.
ReporterCategory	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

<b>Details</b>

#### Description

Role of the reporter in the organization.

Possible values are:

- Childcare Providers
- Healthcare worker
- Law Enforcement
- Medical Examiners
- Mental Health Professionals
- Other
- School Personnel
- Social Worker

The default value is School Personnel.

#### ReporterOrganization

#### Type

string

#### **Properties**

Create, Filter, Group, Nillable, Sort, Update

#### Description

Organization that the reporter is part of.

#### ShouldInclInRegulatoryRpt

#### Type

boolean

#### **Properties**

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

#### Description

Whether this complaint must be included in a regulatory report. This field is available in API version 58.0 and later.

The default value is false.

#### SourceType

#### Type

picklist

#### **Properties**

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

#### Description

The source of the complaint. This field is available in API version 58.0 and later.

Possible values are:

- Branch
- Consumer Protection Agency
- Contact Centre

Field	Details
	• Mobile App
	• Regulatory Agency
	• Social Media
	• Web Chat
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Status of the complaint.
	Possible values are:
	• In Review
	• Resolved
	• Submitted
Subject	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Subject of the complaint. This field is available in API version 51.0 and later.

### **Associated Objects**

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

#### PublicComplaintFeed

Feed is available for the object.

#### PublicComplaintHistory

History is available for the object.

#### Public Complaint Owner Sharing Rule

Sharing rules are available for the object.

#### PublicComplaintShare

Sharing is available for the object.

### Referral

Represents the information on client referrals in an organization. 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
AuthorizationStatus	Туре
	picklist
	Properties  Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies the authorization status of the referral for the associated provider. Available in API version 61.0 and later.
	Possible values are:
	• Authorized
	• In Review
	• Rejected
	• Submitted
CaseId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The case associated with the referral.
	This field is a relationship field.
	Relationship Name Case
	Relationship Type Lookup
	<b>Refers To</b> Case
Category	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The category of referral.

Field	Details
ClientEmail	Туре
	email
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The email address of the referred client.
ClientId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The account associated with the referred client.
	This field is a relationship field.
	Relationship Name
	Client
	Relationship Type Lookup
	Refers To
	Account
ClientLanguage	Туре
	multipicklist
	Properties
	Create, Filter, Nillable, Update
	<b>Description</b> The languages that the referred client speaks.
	Possible values are:
	• Arabic
	• Chinese
	• Dutch
	• English
	• French
	• German
	• Hindi
	• Portuguese
	• Russian
	1,000 1011

Field	Details
ClientName	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The name of the referred client.
ClientPhone	Туре
	phone
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The phone number of the referred client.
Comments	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	Additional details about the referral.
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The description of the referral.
IsSelfReferred	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the referral is made by the client.
	The default value is false.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description  The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view  ( <parmname>LastReferencedDate</parmname> ) but not viewed it.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> Name of the referral.
OutboundSourceId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The source of an outbound referral.
	This field is a polymorphic relationship field.
	Relationship Name OutboundSource
	Relationship Type Lookup
	<b>Refers To</b> Benefit Assignment, Case, Referral
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	Description  ID of the owner of this object.
	This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
Priority	Type
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Indicates the priority of the referral.
	Possible values are:
	• Critical
	• High
	• Low
	• Medium
ProgramId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program that's associated with the referral.
	This field is a relationship field.
	Relationship Name Program
	Relationship Type Lookup
	Refers To Program
ProviderEmail	<b>Type</b> email
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The email address of the person or the organization that the client is being referred to.

Field	Details		
ProviderFacilityId	<b>Type</b> reference		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The practitioner or provider facility associated with the referral.		
	Available in API version 59.0 and later.		
	This field is a polymorphic relationship field.		
	Relationship Name ProviderFacility		
	Relationship Type Lookup		
	<b>Refers To</b> CareProviderFacilitySpecialty, HealthcarePractitionerFacility		
ProviderId	<b>Type</b> reference		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The account or contact associated with the person or the organization that the client is being referred to.		
	This field is a polymorphic relationship field.		
	Relationship Name Provider		
	Relationship Type Lookup		
	Refers To Account, Contact, HealthcareProvider		
ProviderName	<b>Type</b> string		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The name of the person or the organization that the client is being referred to.		
ProviderOrg	Туре		
	string  Properties  Create, Filter, Group, Nillable, Sort, Update		

Field	Details		
	<b>Description</b> The organization that the client is being referred to.		
ProviderPhone	<b>Type</b> phone		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The phone number of the person or the organization that the client is being referred to.		
RecordTypeId	<b>Type</b> reference		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> This field is a relationship field.		
	Relationship Name RecordType		
	Relationship Type  Lookup		
	Refers To RecordType		
ReferralDate	<b>Type</b> date		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The date on which the referral is received.		
ReferralType	<b>Type</b> picklist		
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update		
	<b>Description</b> Specifies whether the referral is inbound or outbound.		
	Possible values are:		
	• INBOUND—Inbound		
	OUTBOUND—Outbound		

Field	Details
ReferrerEmail	Туре
	email
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The email address of the person or the organization that referred the client.
ReferrerId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The account or contact associated with the person or the organization that referred the client.
	This field is a polymorphic relationship field.
	Relationship Name Referrer
	Relationship Type Lookup
	Refers To Account, Contact
ReferrerName	Туре
	string
	Properties Committee Commi
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the person or the organization that referred the client.
ReferrerOrg	<b>Type</b> string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	Description
	The organization that referred the client.
ReferrerPhone	Туре
	phone
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details		
	<b>Description</b> The phone number of the person or the organization that referred the client.		
Result	<b>Type</b> textarea		
	<b>Properties</b> Create, Filter, Nillable, Sort, Update		
	<b>Description</b> The outcome of the referral.		
ResultCategory	<b>Type</b> picklist		
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update		
	<b>Description</b> Specifies the category of the referral result.		
	Possible values are:		
	• Approved		
	Client Declined Services		
	• Pending		
	Referred Elsewhere		
	• Rejected		
Source	Туре		
	picklist		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The source of the referral.		
	Possible values are:		
	• Application		
	• Email		
	• Message		
	• Other		
	• Phone		
	• Social Media		
	• Walk-In		
Status	Туре		
	picklist		

Field	Details  Properties		
	Create, Filter, Group, Nillable, Sort, Update		
	Description		
	Specifies the status of the referral.		
	Possible values are:		
	• Approved		
	• Enrolled		
	• In Review		
	• New		
	• Rejected		
Title	Туре		
	string		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	Description		
	The title of the referral.		
UsageType	Туре		
	picklist		
	Properties		
	Create, Filter, Group, Nillable, Sort, Update		
	Description		
	Specifies the usage of the referral.		

# **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.

#### ReferralFeed

Feed tracking is available for the object.

#### ReferralHistory

History is available for tracked fields of the object.

#### Referral Owner Sharing Rule

Sharing rules are available for the object.

#### ReferralShare

Sharing is available for the object.

# Case Management Business API

Case Management Business APIs are RESTful APIs that are sometimes available as Apex classes and methods.

Case Management has these resources.

Resource	Description
<pre>/connect/careplan/care-plans/\${carePlanId}/tasks</pre>	Create tasks for benefits and goals in a care plan.
/connect/careplan/care-plans/\${carePlanId}/tasks	Update tasks for benefits and goals in a care plan.
/connect/careplan/care-plans/\${carePlanId}/tasks	Get tasks for benefits and goals in a care plan.

### **EDITIONS**

Available in: Lightning Experience

Available in: Case Management is available with Enterprise, Unlimited, and Performance Editions with the Impact Cloud.

#### **REST Reference**

You can access Case Management Business APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

### **REST Reference**

You can access Case Management 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.

#### Requests

Here's a list of Case Management Business API request bodies.

#### Resources

Here's a list of Case Management Business API resources.

#### Responses

Here's a list of Case Management Business API response bodies.

### Requests

Here's a list of Case Management Business API request bodies.

#### Create Care Plan Tasks Input

Input representation of the request to create care plan task.

#### Update Care Plan Tasks Input

Input representation of the request to update care plan task.

### Create Care Plan Tasks Input

Input representation of the request to create care plan task.

#### Root XML tag

<CarePlanTasksInputRepresentation>

#### JSON example

#### **Properties**

Parameter Name	Туре	Description	Required or Optional	Available Version
carePlanId	String	ID of the care plan or case for a given care team.	Required	56.0
subject	String	Subject of the task assigned to the care plan.	Optional	56.0
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Optional	56.0
priority	String	Priority of the task assigned to the care plan.	Optional	56.0
comment	String	Comments made on the care plan task.	Optional	56.0
assignedTo	String	ID of the user who is assigned the task.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0

### Update Care Plan Tasks Input

Input representation of the request to update care plan task.

#### **Root XML tag**

<CarePlanTasksInputRepresentation>

#### JSON example

#### **Properties**

Parameter Name	Туре	Description	Required or Optional	Available Version
carePlanId	String	ID of the care plan or case for a given care team.	Required	56.0
subject	String	Subject of the task assigned to the care plan.	Optional	56.0
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Optional	56.0
priority	String	Priority of the task assigned to the care plan.	Optional	56.0
comment	String	Comments made on the care plan task.	Optional	56.0
assignedTo	String	ID of the user who is assigned the task.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0

#### Resources

Here's a list of Case Management Business API resources.

#### Create Care Plan Tasks

Create tasks for the benefits, goals and also at a care plan level.

#### Update Care Plan Tasks

Resource for updating care plan task.

#### Get Care Plan Tasks

Resource for getting care plan task.

#### Create Care Plan Tasks

Create tasks for the benefits, goals and also at a care plan level.

#### Resource

```
/connect/careplan/care-plans/${carePlanId}/tasks
```

#### Resource example

https://yourInstance.salesforce.com/services/data/v56.0/connect/careplan/care-plans/carePlanId/tasks

#### **Available version**

56.0

#### **HTTP** methods

**POST** 

#### **Request parameters for POST**

#### Root XML tag

<CarePlanTasksInputRepresentation>

#### JSON example

#### **Properties**

Parameter Name	Туре	Description	Required or Optional	Available Version
carePlanId	String	ID of the care plan or case for a given care team.	Required	56.0

Parameter Name	Туре	Description	Required or Optional	Available Version
subject	String	Subject of the task assigned to the care plan.	Optional	56.0
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Optional	56.0
priority	String	Priority of the task assigned to the care plan.	Optional	56.0
comment	String	Comments made on the care plan task.	Optional	56.0
assignedTo	String	ID of the user who is assigned the task.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0

#### **Response body for POST**

Create Care Plan Task Output

### Update Care Plan Tasks

Resource for updating care plan task.

#### Resource

```
/connect/careplan/care-plans/carePlanId/tasks
```

#### Resource example

#### **Available version**

56.0

#### **HTTP** methods

**PATCH** 

#### **Request parameters for PATCH**

#### Root XML tag

<CarePlanTasksInputRepresentation>

#### JSON example

```
"tasks": {
   "records": [
      {
         "subject": "Update CP Edit GOAL ASSIGNEMENT Task 990",
         "dueDate": "2023-19-08T00:00:00.000Z",
```

Case Management REST Reference

```
"status": "Not Started",
    "priority": "Low",
    "comment": "Update CP Edit GOAL ASSIGNEMENT Task 990",
    "assignedTo": "005xx000001YkA1AAK",
    "id": "00Txx000003rMTcEAM"
    }
}
```

### **Properties**

Parameter Name	Туре	Description	Required or Optional	Available Version
carePlanId	String	ID of the care plan or case for a given care team.	Required	56.0
subject	String	Subject of the task assigned to the care plan.	Optional	56.0
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Optional	56.0
priority	String	Priority of the task assigned to the care plan.	Optional	56.0
comment	String	Comments made on the care plan task.	Optional	56.0
assignedTo	String	ID of the user who is assigned the task.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0

## **Response body for PATCH**

Update Care Plan Task Output

## Get Care Plan Tasks

Resource for getting care plan task.

#### Resource

```
/connect/careplan/care-plans/carePlanId/tasks
```

### Resource example

### **Available version**

56.0

Case Management REST Reference

#### **HTTP** methods

**GET** 

### **Response body for GET**

Get Care Plan Task Output

## Responses

Here's a list of Case Management Business API response bodies.

Create Care Plan Task

Output representation of the request to create a care plan task.

Update Care Plan Task

Output representation of the request to update a care plan task.

Get Care Plan Tasks

Output representation of the request to get care plan task.

## Create Care Plan Task

Output representation of the request to create a care plan task.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 56.0	56.0
success	Boolean	Indicates whether the request was successful (true) or not (false).	Small, 56.0	56.0

## Update Care Plan Task

Output representation of the request to update a care plan task.

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	The message that provides the request response details.	Small, 56.0	56.0
success	Boolean	Indicates whether the request was successful (true) or not (false).	Small, 56.0	56.0

## Get Care Plan Tasks

Output representation of the request to get care plan task.

Case Management REST Reference

### JSON example

```
"carePlanTasks": {
 "adhocTasks": {
   "records": [
        "subject": "Adhoc Task 19087899",
        "dueDate": "2022-08-09T00:00:00.000Z",
        "status": "In Progress",
       "priority": "High",
       "comment": "First Adhoc task 19082343254325",
       "assignedTo": "005xx000001YkA1AAK"
      } ,
       "subject": "Adhoc Task 290889999",
       "dueDate": "2022-08-31T00:00:00.000Z",
        "status": "Not Started",
        "priority": "High",
        "comment": "Second Adhoc task 29083424324",
        "assignedTo": "005xx000001YkA1AAK"
     },
        "subject": "Adhoc Task 390821324324",
        "dueDate": "2022-08-08T00:00:00.000Z",
        "status": "Not Started",
        "priority": "Low",
        "comment": "Third Adhoc task 39082343243245",
        "assignedTo": "005xx000001YkA1AAK"
      }
   ]
 }
```

#### **Properties**

Property Name	Туре	Description	Filter Group and Version	Available Version
subject	String	Subject of the task assigned to the care plan.	Small, 56.0	56.0
dueDate	String	Due date of the task assigned to the care plan.	Small, 56.0	56.0
status	String	Status of the task assigned to the care plan, such as In Progress or Completed.	Small, 56.0	56.0
priority	String	Priority of the task assigned to the care plan.	Small, 56.0	56.0
comment	String	Comments made on the care plan task.	Small, 56.0	56.0
assignedTo	String	ID of the user who is assigned the task.	Small, 56.0	56.0

# **CHAPTER 6** Outcome Management Standard Objects

## In this chapter ...

- ImpactStrategy
- ImpadStrategyAssignment
- IndicatorAssignment
- IndicatorDefinition
- IndicatorPerformancePeriod
- IndicatorResult
- Outcome
- OutcomeActivity
- TimePeriod
- UnitOfMeasure

The Outcome Management data model provides objects and fields to define, measure, and evaluate an organization's outcome strategy.

# **ImpactStrategy**

Represents a high-level strategy to affect change in an individual, population, stakeholder, or the environment. This object is available in API version 59.0 and later.

# Supported Calls

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

# **Special Access Rules**

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Field	Details
Description	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The description about the impact strategy.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Date and time when a user last referenced this impact strategy.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Date and time when a user last viewed this impact strategy.
Level	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description
	Specifies the level or scope of the impact strategy.
	Possible values are:
	• Department
	• Organizational
	• Program
Name	Туре
	string
	Properties Control of
	Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the impact strategy.
	The name of the impact stategy.
OwnerId	Туре
	reference
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the user who owns the impact strategy.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To
	Group, User
ParentImpactStrategyId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The associated parent impact strategy.
	This field is a relationship field.
	Relationship Name
	ParentlmpactStrategy
	Relationship Type Lookup

Field	Details
	Refers To ImpactStrategy
	Impactstrategy
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Specifies the status of the impact strategy.
	Possible values are:
	• Active
	• Canceled
	• Completed
	• Planned
Туре	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the type of the impact strategy.
	Possible values are:
	• External Requirement
	Logic Model
	Strategic Plan
	Theory of Change

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.

### ImpactStrategyFeed

Feed tracking is available for the object.

### **ImpactStrategyHistory**

History is available for tracked fields of the object.

## Impact Strategy Owner Sharing Rule

Sharing rules are available for the object.

## Impact Strategy Share

Sharing is available for the object.

# **ImpactStrategyAssignment**

Represents the connection between the impact strategy and the outcome or other object related to the impact strategy. This object is available in API version 59.0 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 Calls

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

# **Special Access Rules**

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Field	Details
ImpactStrategyId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The impact strategy associated with this impact strategy assignment.
	This field is a relationship field.
	Relationship Name
	ImpactStrategy
	Relationship Type
	Master-Detail
	Refers To
	ImpactStrategy
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	Date and time when a user last referenced this impact strategy assignment.

Field	Details
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last viewed this impact strategy assignment.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The unique number of the impact strategy assignment.
OutcomeId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort, Update
	<b>Description</b> The outcome associated with this impact strategy assignment.
	This field is a relationship field.
	Relationship Name Outcome
	Relationship Type Lookup
	Refers To Outcome

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.

## ImpactStrategyAssignmentFeed

Feed tracking is available for the object.

## Impact Strategy Assignment History

History is available for tracked fields of the object.

# IndicatorAssignment

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity. This object is available in API version 59.0 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 Calls

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

# **Special Access Rules**

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Field	Details
IndicatorAssignmentType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Specifies the object that the indicator assignment measures.
	Possible values are:  • Outcome
	• Program
IndicatorDefinitionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The indicator definition that's associated with the indicator assignment.
	This field is a relationship field.
	Relationship Name IndicatorDefinition

Relationship Type
Master-Detail
Refers To
IndicatorDefinition
<b>Type</b> picklist
Properties  Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
<b>Description</b> Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the parent indicator definition.
Possible values are:
• Decrease
• Increase
• Maintain
<b>Type</b> dateTime
<b>Properties</b> Filter, Nillable, Sort
<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
<b>Type</b> dateTime
<b>Properties</b> Filter, Nillable, Sort
<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
<b>Type</b> string
Properties  Create Filter Group idlookup Sort Update
Create, Filter, Group, idLookup, Sort, Update
<b>Description</b> The name of the indicator assignment.

Field	Details
OutcomeId	Туре
	reference  Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The outcome that the indicator assignment measures.
	This field is a relationship field.
	Relationship Name Outcome
	Relationship Type
	Lookup
	Refers To Outcome
	Outcome
OwnerId	<b>Type</b> reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	The owner of this indicator assignment.
	This field is a polymorphic relationship field.
	<b>Relationship Name</b> Owner
	Relationship Type
	Lookup
	Refers To
	Group, User
ProgramId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program that the indicator assignment measures.
	This field is a relationship field.
	Relationship Name
	Program
	Relationship Type Lookup

Field	Details
	Refers To
	Program
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Specifies the status of the indicator assignment.
	Possible values are:
	• Active
	• Canceled
	• Completed
	• Planned

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.

#### IndicatorAssignmentFeed

Feed tracking is available for the object.

#### IndicatorAssignmentHistory

History is available for tracked fields of the object.

#### Indicator Assignment Owner Sharing Rule

Sharing rules are available for the object.

#### IndicatorAssignmentShare

Sharing is available for the object.

## IndicatorDefinition

Represents information about the indicator assignment and the process of measuring and calculating the indicator results. This object is available in API version 59.0 and later.

# Supported Calls

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

# **Special Access Rules**

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Field	Details
Description	<b>Type</b> textarea
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The description of the indicator definition.
FlowDefinitionApiName	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The API name of the flow definition associated with the indicator definition. This field is available from API version 60.0 and later.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last referenced this indicator definition.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last viewed this indicator definition.
Name	Type
	Properties Create, Filter, Group, idLookup, Sort, Update

Field	Details
	<b>Description</b> The name of the indicator definition.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the user who owns the outcome.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
Status	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Sort, Update
	Description
	Specifies the status of the indicator definition.
	Possible values are:
	• Active
	• Canceled
	• Completed
	• Planned
UnitOfMeasureId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The unit of measure for the target, baseline, and result values that are associated with this indicator definition.
	This field is a relationship field.
	Relationship Name UnitOfMeasure

Field	Details
	Relationship Type Lookup
	Refers To UnitOfMeasure

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.

#### IndicatorDefinitionFeed

Feed tracking is available for the object.

#### IndicatorDefinitionHistory

History is available for tracked fields of the object.

#### Indicator Definition Owner Sharing Rule

Sharing rules are available for the object.

#### IndicatorDefinitionShare

Sharing is available for the object.

## IndicatorPerformancePeriod

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 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 Calls**

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

# **Special Access Rules**

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Field	Details
BaselineDescription	Туре
	textarea
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The description of the baseline value.
BaselineValue	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update
	Description
	The value of the indicator assignment at the beginning of the indicator performance period.
Description	Туре
	textarea
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The description of the indicator performance period.
IndicatorAssignmentId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The indicator assignment that's associated with the indicator performance period.
	This field is a relationship field.
	Relationship Name Indicator Assignment
	Relationship Type  Master-Detail
	Refers To Indicator Assignment
LastReferencedDate	Туре
	dateTime
	<b>Properties</b> Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastResultMeasurementDate	<b>Type</b> date
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The date when the last result value was measured.
	This field is a calculated field.
LastResultValue	<b>Type</b> double
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The result value from the most recently measured indicator result.
	This field is a calculated field.
LastViewedDate	Type dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
Name	<b>Type</b> string
	Properties  Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the indicator performance period.
TargetProgress	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the progress of the target within the time period.

Field	Details
	Possible values are:
	• At Risk
	• Complete
	• Not Met
	• Not Started
	• On Track
TargetValue	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The target value of the indicator assignment within the time period.
TimePeriodId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update
	Description
	The time period that is associated with the indicator performance period.
	This field is a relationship field.
	<b>Relationship Name</b> TimePeriod
	Relationship Type
	Lookup
	<b>Refers To</b> TimePeriod

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.

### Indicator Performance Period Feed

Feed tracking is available for the object.

### IndicatorPerformancePeriodHistory

History is available for tracked fields of the object.

# IndicatorResult

Represents the result of an indicator assignment for the specified time period that can be used to track the performance of the indicator. This object is available in API version 59.0 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 Calls

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

# **Special Access Rules**

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

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## **Fields**

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Field	Details
CalculationMethod	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Determines whether the indicator result was added manually or calculated by automation. This field is available from API version 60.0 and later.
	Possible values are:
	AutomaticallyCalculated
	• Manual
Denominator	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort
	<b>Description</b> The denominator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.

Field	Details
Description	Туре
	textarea
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The description of the indicator result.
FlowDefinitionApiName	<b>Type</b> string
	Properties
	Create, Filter, Group, Nillable, Sort
	Description
	The API name of the flow definition associated with this indicator result. This field is available from API version 60.0 and later.
FlowVersion	Туре
	int
	Properties
	Create, Filter, Group, Nillable, Sort
	<b>Description</b> The version of the flow that calculated this result. This field is available from API version 60.0 and later.
IndicatorPerformancePeriodId	Type reference
	Properties
	Create, Filter, Group, Sort
	<b>Description</b> The indicator performance period for which the result is defined.
	This field is a relationship field.
	Relationship Name IndicatorPerformancePeriod
	Relationship Type  Master-Detail
	Refers To IndicatorPerformancePeriod
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort

Field	Details
	<b>Description</b> Date and time when a user last referenced this indicator result.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last viewed this indicator result.
MeasurementDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The date on which the indicator result is measured.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the indicator result.
Numerator	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort
	<b>Description</b> The numerator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.
ResultValue	<b>Type</b> double
	<b>Properties</b> Create, Filter, Sort, Update
	<b>Description</b> The result for the indicator performance period.
Туре	<b>Type</b> picklist

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of the result for the time period.
	Possible values are:
	• Final
	• Interim

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.

#### IndicatorResultFeed

Feed tracking is available for the object.

#### IndicatorResultHistory

History is available for tracked fields of the object.

## **Outcome**

Represents information about the expected change in participants that is driven by the organization's activity. This object is available in API version 59.0 and later.

# Supported Calls

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

# **Special Access Rules**

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Field	Details
Description	<b>Type</b> textarea
	<b>Properties</b> Create, Filter, Nillable, Sort, Update

Field	Details
	<b>Description</b> The description of the outcome.
IntendedDirection	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the outcome.
	Possible values are:
	• Decrease
	• Increase
	• Maintain
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last referenced this outcome.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last viewed this outcome.
Name	<b>Type</b> string
	Properties  Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the outcome.
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description
	The ID of the user who owns the outcome.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
SourceName	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the source that initially defined the outcome. For example, United Nations Sustainable Development Goals (UNSDG).
Status	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b>
	Specifies the status of the outcome.
	Possible values are:
	• Active
	• Canceled
	<ul><li>Completed</li><li>Planned</li></ul>
Term	Type picklist
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the term for which the outcome is defined.
	Possible values are:
	• Long-Term
	• Medium-Term
	• Short-Term

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.

#### OutcomeFeed

Feed tracking is available for the object.

#### OutcomeHistory

History is available for tracked fields of the object.

#### OutcomeOwnerSharingRule

Sharing rules are available for the object.

#### **OutcomeShare**

Sharing is available for the object.

# OutcomeActivity

Represents a junction between Outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 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 Calls**

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

# **Special Access Rules**

This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.

Field	Details
BenefitId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The benefit that's associated with the outcome.
	This field is a relationship field.
	Relationship Name Benefit

Field	Details
	Relationship Type Lookup  Refers To Benefit
GoalDefinitionId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The goal definition that's associated with the outcome. This field is available from API version 60.0 and later.
	This field is a relationship field.
	Relationship Name GoalDefinition
	Relationship Type Lookup
	Refers To GoalDefinition
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last referenced this outcome activity.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last viewed this outcome activity.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the outcome activity.

Field	Details
OutcomeActivityType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<ul> <li>Description The type of activity that's associated with the outcome, such as program, benefit. Possible values are: <ul> <li>Benefit</li> <li>Goal Definition This value is available from API version 60.0 and later.</li> <li>Program</li> </ul> </li> </ul>
OutcomeId	Туре
	reference  Properties
	Create, Filter, Group, Sort
	<b>Description</b> The outcome that's associated with the outcome activity.
	This field is a relationship field.
	Relationship Name Outcome
	Relationship Type  Master-Detail
	Refers To Outcome
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The owner of the record.
	This field is a polymorphic relationship field.
	This field is available from API version 63.0 and later.
	<b>Relationship Name</b> Owner
	<b>Refers To</b> Group, User
ProgramId	<b>Type</b> reference

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program that's associated with the outcome.
	This field is a relationship field.
	Relationship Name Program
	Relationship Type Lookup
	Refers To Program

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.

#### OutcomeActivityShare

Sharing is available for the object.

#### OutcomeActivityOwnerSharingRule

Sharing rules are available for the object.

#### OutcomeActivityFeed

Feed tracking is available for the object.

### OutcomeActivityHistory

History is available for tracked fields of the object.

## **TimePeriod**

Represents the time period that's used to calculate the indicator performance and result. This object is available in API version 59.0 and later.

# Supported Calls

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

## **Special Access Rules**

- This object is available in products that include the Outcome Management license where Outcome Management is enabled and the Manage Outcomes system permission is assigned to users.
- This object is available in Net Zero Cloud with a Growth license where the Manage Environmental, Social, and Governance Programs system permission is assigned to users.

Field	Details
EndDate	Type dateTime Properties
	Create, Filter, Sort, Update
	<b>Description</b> The end date and time of the time period.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last referenced this time period.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> Date and time when a user last viewed this time period.
Name	<b>Type</b> string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the time period.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the user who owns the time period.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup

Field	Details
	Refers To
	Group, User
StartDate	<b>Type</b> dateTime
	Properties Create, Filter, Sort, Update
	<b>Description</b> The start date and time of the time period.

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.

#### **TimePeriodFeed**

Feed tracking is available for the object.

#### **TimePeriodHistory**

History is available for tracked fields of the object.

### TimePeriodOwnerSharingRule

Sharing rules are available for the object.

#### **TimePeriodShare**

Sharing is available for the object.

# **UnitOfMeasure**

Represents the unit of measures for care metrics and care observations. This object is available in API version 49.0 and later.

# **Supported Calls**

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

Field	Details
Description	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The description of this unit of measure.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> 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	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of this unit of measure.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the user who owns this record.
Туре	<b>Type</b> picklist
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The type of the unit of measure. For example, weight, distance, period.
UnitCode	<b>Type</b> string

Field	Details
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The code for this unit of measure. For example, mm[Hg], mcg/mL., kgs, lbs.

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.

### **UnitOfMeasureChangeEvent (API version 59.0)**

Change events are available for the object.

## ${\bf Unit Of Measure Owner Sharing Rule}$

Sharing rules are available for the object.

### UnitOfMeasureShare

Sharing is available for the object.

# **CHAPTER 7** Grantmaking

## In this chapter ...

- Grantmaking Object Reference
- Grantmaking Tooling API Object
- Grantmaking Metadata API Types

This guide provides information about the objects and APIs that Grantmaking uses.

## EDITIONS

Available in: Lightning Experience

Available in:

**Enterprise**, **Unlimited**, and **Developer** Editions

# **Grantmaking Object Reference**

The Grantmaking data model provides objects and fields to calculate and manage grants for your organization.

#### **ApplicationDecision**

Represents a final decision performed for the specified Application. This object is available in API version 56.0 and later.

#### **ApplicationRenderMethod**

Represents how a part of an application can be rendered. This object is available in Grantmaking API version 61.0 and later.

### ApplicationReview

Represents a review performed against a specified Individual Application. This object is available in API version 56.0 and later.

#### ApplicationStageDefinition

Represents a stage of an application. This object is available in Grantmaking API version 61.0 and later.

#### **ApplicationTimeline**

Represents the milestone dates in the application process. This object is available in API version 57.0 and later.

#### Budget

Tracks an estimate of future revenue or expenses during a specific time period. This object is available in API version 53.0 and later.

#### BudgetAllocation

Represents a subsection of a Budget that shows where allocated resources are being applied. This object is available in API version 53.0 and later.

#### BudgetCategory

Represents the purpose of the budget line item. This object is available in API version 57.0 and later.

#### BudgetCategoryValue

Captures budget values for category and time period. This object is available in API version 57.0 and later.

#### BudgetParticipant

Represents information about a user or group of participants who have access to a budget. This object is available in API version 59.0 and later.

#### BudgetPeriod

Defines a distinct time interval in which the estimate applies. This object is available in API version 57.0 and later.

#### **FundingAward**

Represents an award given to an individual or organization to facilitate a goal related to the funder's mission. This object is available in API version 57.0 and later.

#### FundingAwardAmendment

Represents a modification to the scope or finances of a previously approved award. This object is available in API version 57.0 and later.

### Funding Award Participant

Represents information about a user or group of participants who have access to a funding award. This object is available in API version 59.0 and later.

## **EDITIONS**

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions in Nonprofit Cloud for Grantmaking

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions in Public Sector Solutions

Grantmaking Application Decision

#### FundingAwardRequirement

Represents a deliverable or milestone for a funding award or funding disbursement. This object is available in API version 57.0 and later.

#### FundingAwardRqmtSection

Represents a part of a funding award requirement to be completed or reviewed. This object is available in API version 62.0 and later.

#### FundingDisbursement

Represents a payment that has been made or scheduled to be made to a funding recipient. This object is available in API version 57.0 and later.

#### **FundingOpportunity**

The pool of money available for distribution for a specific purpose. This object is available in API version 57.0 and later.

#### FundingOppParticipant

Represents information about a user or group of participants who have access to a funding opportunity. This object is available in API version 60.0 and later.

#### IndicatorAssignment

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity This object is available in API version 59.0 and later.

#### IndicatorPerformancePeriod

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 and later.

#### IndividualApplication

Represents an application form submitted by an individual or organization. This object is available in API version 50.0 and later.

#### Individual Application Task

Represents a task related to an application. This object is available in Grantmaking API version 61.0 and later.

#### IndvApplicationTaskParticipant

Represents information about a user or group of participants who have read or write access to an individual application task. This object is available in API version 61.0 and later.

#### IndividualAppInParticipant

Represents information about a user or group of participants who have access to a individual application. This object is available in API version 59.0 and later.

#### OutcomeActivity

Represents a junction between an outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 and later.

### PreliminaryApplicationRef

Represents the saved applications and pre-screening forms. This object is available in API version 49.0 and later.

#### Program

Represents information about the enrollment and disbursement of benefits in a program. This object is available in API version 57.0 and later.

# **ApplicationDecision**

Represents a final decision performed for the specified Application. This object is available in API version 56.0 and later.

Grantmaking ApplicationDecision

# **Supported Calls**

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

# **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Field	Details	
ApplicationDecision	<b>Type</b> picklist	
	Properties	
	Create, Filter, Group, Nillable, Sort, Update	
	<b>Description</b> Specifies the decision for the application.	
	Possible values are:	
	• Award	
	• Deny	
ApplicationId	Туре	
	reference	
	Properties	
	Create, Filter, Group, Sort, Update	
	<b>Description</b> The ID of the application.	
	This field is a polymorphic relationship field.	
	Relationship Name Application	
	Relationship Type	
	Lookup	
	Refers To Individual Application	
Comment	Туре	
	textarea	
	Properties	
	Create, Nillable, Update	
	Description	
	The information about the decision provided on the application.	

Grantmaking Application Decision

Field	Details
DecisionAuthorityId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The user responsible for the application decision.
	This field is a relationship field.
	Relationship Name DecisionAuthority
	Relationship Type Lookup
	<b>Refers To</b> User
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> Name of the preliminary application.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner who owns the record.

Grantmaking ApplicationRenderMethod

Field	Details
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
PreliminaryApplicationRefId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of the preliminary application reference.
	This field is a relationship field.
	Relationship Name PreliminaryApplicationRef
	Relationship Type Lookup
	Refers To PreliminaryApplicationRef

# **ApplicationRenderMethod**

Represents how a part of an application can be rendered. This object is available in Grantmaking API version 61.0 and later.

# **Supported Calls**

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

# **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Applications system permission is assigned to users.

Field	Details	
Description	<b>Type</b> textarea	

Grantmaking ApplicationRenderMethod

Field	Details
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The description of the application render method.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
MethodName	<b>Type</b> textarea
	Properties Create, Nillable, Update
	<b>Description</b> The name of the render method associated with the application.
MethodRecordId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The record ID of the method that's associated with the application render method.
	This field is a polymorphic relationship field.
	Relationship Name  MethodRecord
	Relationship Type Lookup
	Refers To OmniProcess, OmniUiCard

Grantmaking ApplicationRenderMethod

Field	Details
MethodType	Type picklist  Properties Create, Filter, Group, Restricted picklist, Sort, Update  Description Specifies the type of method that's used to render components in the application.  Possible values are: FlexCard Flow OmniScript
Name	Type string  Properties Create, Filter, Group, idLookup, Sort, Update  Description The name of the application render method.
OwnerId	Type reference  Properties Create, Defaulted on create, Filter, Group, Sort, Update  Description ID of the user who owns the record. This field is a polymorphic relationship field.  Relationship Name Owner  Relationship Type Lookup  Refers To Group, User
UsageType	Type picklist  Properties Create, Filter, Group, Restricted picklist, Sort, Update  Description Specifies the usage type of the application render method. Possible values are:  • FormFramework This value is available from API version 63.0 and later.

Field	Details
	• Grantmaking
	The default is FormFramework.

## **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.

#### ApplicationRenderMethodFeed

Feed tracking is available for the object.

### ApplicationRenderMethodHistory

History is available for tracked fields of the object.

#### ${\bf Application Render Method Share}$

Sharing is available for the object.

## **ApplicationReview**

Represents a review performed against a specified Individual Application. 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()

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Field	Details
ApplicationCategory	<b>Type</b> picklist
	<b>Properties</b> Filter, Group, Nillable, Sort
	Description Specifies the category of the application based on the decision period. Possible values are:
	<ul><li>Basic</li><li>Special</li></ul>

Field	Details	
ApplicationId	Туре	
	reference	
	<b>Properties</b> Create, Filter, Group, Sort, Update	
	<b>Description</b> The individual application associated with the application review.	
	This field is a polymorphic relationship field.	
	Relationship Name Application	
	Relationship Type Lookup	
	Refers To Individual Application	
ApplicationRecommendation	<b>Type</b> picklist	
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update	
	<b>Description</b> Specifies the reviewer's recommended outcome of the application.	
	Possible values are:	
	Ask for Revisions	
	• Award	
	• Deny	
ApplicationStageDefinitionId	Type reference	
	Properties	
	Create, Filter, Group, Nillable, Sort, Update	
	Description	
	The application stage definition that's associated with the application review.	
	This field is a relationship field.	
	Relationship Name ApplicationStageDefinition	
	Relationship Type Lookup	
	Refers To ApplicationStageDefinition	

Field	Details
AssignedDate	Туре
	date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the application was assigned to the reviewer.
AssignedUserId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Identifies the user assigned to perform the review.
	This field is a relationship field.
	Relationship Name AssignedUser
	Relationship Type Lookup
	<b>Refers To</b> User
Comment	<b>Type</b> textarea
	Properties Create, Nillable, Update
	<b>Description</b> The information about the review provided on the application.
Condition	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The condition that's applicable to an applicant.
DisplayOrder	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The order in which the application review shows on a form.

Field	Details
DueDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The last date by which the application review should be completed.
EndDate	<b>Type</b> date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the application review was completed.
IsAssignedToMe	<b>Type</b> boolean
	Properties  Defaulted on create, Filter, Group, Sort
	<b>Description</b> Indicates whether the application review is assigned to the user who's logged in.
	The default value is false.
	This field is a calculated field.
IsRequired	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the application review is required (true) or not (false).
	The default value is false.
IsSubmitted	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the application review has been submitted.
	This field is available from API version 58.0 and later.
	The default value is true.

Field	Details
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> Name of the application being reviewed.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The owner associated with this application review.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ReviewedById	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The user who reviewed the application.

Field	Details
	This field is a relationship field.
	Relationship Name ReviewedBy
	Relationship Type Lookup
	<b>Refers To</b> User
StartDate	<b>Type</b> date
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the application review started.
Status	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the application review.
	Possible values are:
	• Canceled
	• Completed
	<ul> <li>Draft This value is available from API version 63.0 and later.</li> </ul>
	• In Progress
	• Not Started
SubmissionDate	<b>Type</b> date
	Properties
	Filter, Group, Nillable, Sort
	Description
	The date when the applicant submitted the application.
Title	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The descriptive name for the application review.

Grantmaking ApplicationStageDefinition

### **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.

#### **ApplicationReviewFeed**

Feed tracking is available for the object.

#### **ApplicationReviewHistory**

History is available for tracked fields of the object.

#### **ApplicationReviewOwnerSharingRule**

Sharing rules are available for the object.

### ApplicationReviewShare

Sharing is available for the object.

# **ApplicationStageDefinition**

Represents a stage of an application. This object is available in Grantmaking API version 61.0 and later.

### Supported Calls

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

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Applications system permission is assigned to users.

Details
Туре
textarea
Properties
Create, Nillable, Update
Description
The description of the application stage definition.
Туре
reference
Properties
Create, Filter, Group, Nillable, Sort, Update
Description
The render method for an editable form or application that's associated with this application stage definition.

Grantmaking ApplicationStageDefinition

Field	Details
	This field is a relationship field.
	<b>Relationship Name</b> Edit Type App Render Method
	Relationship Type Lookup
	Refers To ApplicationRenderMethod
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string
	Properties  Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the application stage definition.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the user who owns the record.
	This field is a polymorphic relationship field.
	Relationship Name Owner

Grantmaking ApplicationStageDefinition

Field	Details
	Relationship Type Lookup  Refers To Group, User
Type	Type picklist Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update  Description
	Specifies the type of the application stage definition.
	Possible values are:
	<ul> <li>FormFramework This value is available from API version 63.0 and later.</li> </ul>
	• Grantmaking
ViewTypeAppRenderMethodId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The render method for a read-only form or application that's associated with this application stage definition.
	This field is a relationship field.
	Relationship Name ViewTypeAppRenderMethod
	Relationship Type Lookup
	Refers To ApplicationRenderMethod

# **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.

### **ApplicationStageDefinitionFeed**

Feed tracking is available for the object.

### ApplicationStageDefinitionHistory

History is available for tracked fields of the object.

### ${\bf Application Stage Definition Share}$

Sharing is available for the object.

Grantmaking ApplicationTimeline

# **ApplicationTimeline**

Represents the milestone dates in the application process. 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()

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Field	Details
ApplicationCloseDate	<b>Type</b> date
	Properties  Crosto Filter Croup Nillable Sort Hedate
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The last date when applicants can apply for a grant.
ApplicationOpenDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when applicants can start to apply for a grant.
DecisionReleaseDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the application decision is announced.
LastReferencedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	<b>Type</b> dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	Name of the application timeline being reviewed.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner who owns the record.
	This field is a polymorphic relationship field.
	Relationship Name
	Owner
	Relationship Type Lookup
	Refers To
	Group, User
Туре	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Specifies which feature this application timeline record belongs to.
	Possible values are:
	• Grantmaking

# Budget

Tracks an estimate of future revenue or expenses during a specific time period. 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()

# Special Access Rules

This object is available only if the Grants Management or Grantmaking license is enabled, Grants Management or Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The account associated with the budget.
	This field is available from API version 58.0 and later.
	This field is a relationship field.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
Amount	Type currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total amount of funds for a budget shown in currency format.
EstimatedUtilizationAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount that's estimated to be utilized from the budget.

Field	Details
Description	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The description of the budget and its related business processes.
IsSubmitted	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the budget has been submitted. This field is available from API version 58.0 and later.
	The default value is false.
LastReferencedDate	Туре
	dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> Name of the budget.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description
	ID of the owner who owns the record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	<b>Relationship Type</b> Lookup
	<b>Refers To</b> Group, User
ParentBudgetId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> ID of the associated parent budget.
	This field is available from API version 56.0 and later.
	This field is a relationship field.
	<b>Relationship Name</b> ParentBudget
	Relationship Type Lookup
	Refers To Budget
PeriodEndDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The end of the date range for which the budget applies.
PeriodName	<b>Type</b> string
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The name of the time period to which the budget applies.
PeriodStartDate	<b>Type</b> date

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The beginning of the date range for which the budget applies.
ProgramId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program associated with the budget.
	This field is available from API version 58.0 and later.
	This field is a relationship field.
	Relationship Name Program
	Relationship Type Lookup
	Refers To Program
Quantity	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The quantity used to track a budget for non-currency projects. For example, this could be number of hours or number of resources.
Status	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The status of the budget.
	Possible values are:
	• Active
	• Archived
	• Planned
Type	Туре
	picklist

Grantmaking BudgetAllocation

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Categorizes the budget by how it will be used.
	Possible values are:
	• Department
	• Program
	• Project
UtilizedAmount	<b>Type</b> currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The amount that has already been utilized from the budget.

## **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.

#### **BudgetFeed**

Feed tracking is available for the object.

#### **BudgetHistory**

History is available for tracked fields of the object.

#### BudgetOwnerSharingRule

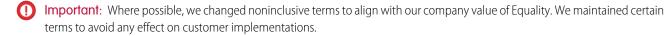
Sharing rules are available for the object.

### **BudgetShare**

Sharing is available for the object.

# **BudgetAllocation**

Represents a subsection of a Budget that shows where allocated resources are being applied. 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()

Grantmaking BudgetAllocation

# Special Access Rules

This object is available only if the Grants Management or Grantmaking license is enabled, Grants Management or Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Field	Details
Amount	<b>Type</b> currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total amount of allocated funds.
BudgetCategoryValueId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The budget category value that's associated with the grants allocation.
	This field is a relationship field.
	Relationship Name BudgetCategoryValue
	Relationship Type Lookup
	Refers To BudgetCategoryValue
BudgetId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The budget that this allocation is related to.
	This field is a relationship field.
	Relationship Name Budget
	Relationship Type Master-Detail
	Refers To Budget

Grantmaking BudgetAllocation

Field	Details
FundingDisbursementId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding disbursement associated with the budget allocation.
	This field is available from API version 58.0 and later.
	This field is a relationship field.
	<b>Relationship Name</b> FundingDisbursement
	Relationship Type Lookup
	<b>Refers To</b> FundingDisbursement
LastReferencedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> A descriptive name for the allocation.
Quantity	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update

Grantmaking BudgetCategory

Field	Details
	Description
	The total quantity amount allocated for non-currency projects.
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The status of the budget allocation.
	Possible values are:
	• Allocated
	• Committed
	• Finalized

### **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.

#### BudgetAllocationFeed

Feed tracking is available for the object.

#### BudgetAllocationHistory

History is available for tracked fields of the object.

# **BudgetCategory**

Represents the purpose of the budget line item. This object is available in API version 57.0 and later.

(1) 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 Calls**

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

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Grantmaking BudgetCategory

Field	Details
BudgetId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The parent budget that's associated with the budget category.
	This field is a relationship field.
	<b>Relationship Name</b> Budget
	Relationship Type  Master-Detail
	Refers To Budget
Description	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The description of the budget category.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	Туре
	string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update

Grantmaking **BudgetCategoryValue** 

Field	Details
	<b>Description</b> The name of the budget category.
Reason	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The reason why an item is being included in the budget.
SequenceNumber	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The number assigned to a budget category that's used to edit or show a category.

## **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.

#### BudgetCategoryFeed

Feed tracking is available for the object.

#### BudgetCategoryHistory

History is available for tracked fields of the object.

## BudgetCategoryValue

Captures budget values for category and time period. 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 Calls**

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

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Grantmaking BudgetCategoryValue

Field	Details
ActualAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The actual amount of the budget that was used.
	This field is available from API version 59.0 and later.
ActualQuantity	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The actual quantity of the budget that was used.
	This field is available from API version 59.0 and later.
Amount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	Description
	The planned amount for the budget.
BudgetCategoryId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The ID that's associated with this budget category value.
	This field is a relationship field.
	Relationship Name
	BudgetCategory
	<b>Relationship Type</b> Master-Detail
	Refers To
	BudgetCategory
BudgetDivisionId	Туре
	reference

Grantmaking BudgetCategoryValue

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The budget period that's associated with the budget category value.
	This field is a relationship field.
	Relationship Name BudgetDivision
	Relationship Type Lookup
	Refers To  BudgetPeriod
Comments	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The comments about how the budget was used.
	This field is available from API version 59.0 and later.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of this budget category value.

Grantmaking BudgetParticipant

Field	Details
Quantity	<b>Type</b> double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The planned quantity for the budget. Use when establishing budgets for non-currency projects.
VarianceAmount	Туре
	currency
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The amount over or under the planned budget that was used.
	This field is available from API version 59.0 and later.
	This field is a calculated field.
VarianceQuantity	<b>Type</b> double
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The quantity over or under the planned budget that was used.
	This field is available from API version 59.0 and later.
	This field is a calculated field.

## **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.

### Budget Category Value Feed

Feed tracking is available for the object.

### Budget Category Value History

History is available for tracked fields of the object.

# BudgetParticipant

Represents information about a user or group of participants who have access to a budget. This object is available in API version 59.0 and later.

Grantmaking **BudgetParticipant** 



(1) 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 Calls**

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

# **Special Access Rules**



**Example**: This object is accessible only when the Grantmaking license is on, Grantmaking is active, Compliant Data Sharing is on, and users have the Managed Funding Awards system permission.

Field	Details
BudgetId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The budget associated with the budget participant.
	This field is a relationship field.
	Relationship Name Budget
	Relationship Type  Master-Detail
	Refers To  Budget
Comments	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The comments about why the participant has access to the budget.
IsParticipantActive	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the budget participant is currently active (true) or not (false).

Grantmaking BudgetParticipant

Field	Details
	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	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the budget participant.
ParticipantId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The participant associated with the budget.
	This field is a polymorphic relationship field.
	Relationship Name Participant
	Relationship Type Lookup
	Refers To Group, User
ParticipantRoleId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update

Grantmaking BudgetPeriod

Field	Details
	<b>Description</b> The participant role associated with the budget participant.
	This field is a relationship field.
	Relationship Name ParticipantRole
	Relationship Type  Lookup
	<b>Refers To</b> 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.

#### BudgetParticipantFeed

Feed tracking is available for the object.

#### BudgetParticipantHistory

History is available for tracked fields of the object.

# BudgetPeriod

Defines a distinct time interval in which the estimate applies. This object is available in API version 57.0 and later.

terms to avoid

**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 Calls**

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

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Field	Details
BudgetId	<b>Type</b> reference

Grantmaking BudgetPeriod

Field	Details
	Properties
	Create, Filter, Group, Sort
	<b>Description</b> The parent budget that's associated with the budget period.
	This field is a relationship field.
	<b>Relationship Name</b> Budget
	Relationship Type  Master-Detail
	Refers To
	Budget
IsSubmitted	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the budget has been submitted. This field is available from API version 59.0 and later.
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	Description
	The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	Properties  Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the budget period.

Grantmaking FundingAward

Field	Details
PeriodEndDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the budget period ends.
PeriodStartDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The start date of the budget period.
SequenceNumber	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The order in which the budget period is shown.

### **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.

### BudgetPeriodFeed

Feed tracking is available for the object.

### Budget Period History

History is available for tracked fields of the object.

# **FundingAward**

Represents an award given to an individual or organization to facilitate a goal related to the funder's mission. 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()

Grantmaking FundingAward

# Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
Amount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total award amount.
AwardNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, Sort
	Description
	The unique identifier of the funding award in the customer's org.
AwardeeId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The entity related to the funding award. The account can be an organization (business
	account) or individual (person account) that receives the funding.
	This field is a relationship field.
	Relationship Name
	Awardee
	<b>Relationship Type</b> Lookup
	Refers To
	Account
BudgetId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The budget that's used to track the use of the award funding.

Grantmaking FundingAward

Field	Details
	This field is a relationship field.
	Relationship Name
	Budget
	Relationship Type
	Lookup
	<b>Refers To</b> Budget
ContactId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The individual receiving the funding award.
	This field is a relationship field.
	Relationship Name Contact
	Relationship Type Lookup
	Refers To Contact
ContractId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The contract associated with the funding award.
	This field is available from API version 59.0 and later.
	This field is a relationship field.
	Relationship Name Contract
	Relationship Type Lookup
	Refers To Contract
DecisionDate	<b>Type</b> dateTime
	Properties  Create, Filter, Nillable, Sort, Update

Grantmaking FundingAward

Field	Details
	<b>Description</b> The date and time of the decision about the funding award.
EndDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the contract related to the award ends.
FundingOpportunityId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding opportunity that's associated with the award.
	This field is a relationship field.
	Relationship Name FundingOpportunity
	Relationship Type Lookup
	<b>Refers To</b> FundingOpportunity
IndividualApplicationId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The individual application that's related to the award.
	This field is a relationship field.
	Relationship Name Individual Application
	Relationship Type Lookup
	Refers To Individual Application
LastReferencedDate	<b>Type</b> dateTime

Grantmaking FundingAward

Field	Details
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the funding award.
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner who owns the record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ParentFundingAwardId	Type
	reference  Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The parent funding award for this funding award.
	This field is a relationship field.

Grantmaking FundingAward

Field	Details
	Relationship Name ParentFundingAward
	Relationship Type
	Lookup
	<b>Refers To</b> FundingAward
ProgramId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program associated with the funding award.
	This field is available from API version 58.0 and later.
	This field is a relationship field.
	Relationship Name Program
	Relationship Type Lookup
	Refers To Program
StartDate	<b>Type</b> dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the contract related to the award begins.
Status	<b>Type</b> picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the current status of the award.
	Possible values are:
	• Active
	• Campleted
	• Completed

### **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.

### Funding Award Feed

Feed tracking is available for the object.

#### **FundingAwardHistory**

History is available for tracked fields of the object.

#### FundingAwardOwnerSharingRule

Sharing rules are available for the object.

#### Funding Award Share

Sharing is available for the object.

## **FundingAwardAmendment**

Represents a modification to the scope or finances of a previously approved award. 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 Calls**

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

### **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
AdjustedAwardAmount	<b>Type</b> currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The actual amount that's approved for adjustment in the funding award amount.
AdjustedEndDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update

Field	Details
	<b>Description</b> The actual date of adjustment to the end date of the funding award.
ApprovalStatus	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the approval status of the requested adjustment.
	Possible values are:
	• Approved
	• In Review
	• New
	• Rejected
Comments	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The comment about the approval or rejection of the adjustment request.
ContractId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The amended contract related to this funding award amendment.
	This field is available from API version 59.0 and later.
	This field is a relationship field.
	Relationship Name Contract
	Relationship Type Lookup
	Refers To Contract
FundingAwardId	<b>Type</b> reference

Field	Details
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The funding award that's associated with the contract that's adjusted.
	This field is a relationship field.
	<b>Relationship Name</b> FundingAward
	Relationship Type  Master-Detail
	<b>Refers To</b> Funding Award
IsSubmitted	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the amendment to the funding award has been submitted (true) or not (false).
	This field is available from API version 58.0 and later.
	The default value is false.
LastReferencedDate	Туре
	dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description  The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	Type
	string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	<b>Description</b>
	The name of amendment for the funding award.
ProposedAwardAmount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	Description
	The amount of adjustment requested in the award amount.
ProposedEndDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The requested change to the End Date of the funding award.
Reason	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The reason for the adjustment requested in the contract.
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the adjustment request.
	Possible values are:
	Approved
	• Draft
	Rejected
	• Submitted
Туре	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> Specifies the type of adjustment.
	Possible values are:
	• Administrative
	• Amount
	• Scope
	• Timeline

## **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.

#### FundingAwardAmendmentFeed

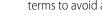
Feed tracking is available for the object.

#### FundingAwardAmendmentHistory

History is available for tracked fields of the object.

# **FundingAwardParticipant**

Represents information about a user or group of participants who have access to a funding award. This object is available in API version 59.0 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 Calls**

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

### **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
Comments	<b>Type</b> string

Grantmaking FundingAwardParticipant

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The comments about why the participant has access to the funding award.
FundingAwardId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The funding award associated with the funding award participant.
	This field is a relationship field.
	Relationship Name FundingAward
	Relationship Type  Master-Detail
	Refers To FundingAward
IsParticipantActive	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the funding award participant is currently active (true) or not (false).
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.

Grantmaking FundingAwardParticipant

Field	Details
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the funding award participant.
ParticipantId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The participant associated with the funding award.
	This field is a polymorphic relationship field.
	<b>Relationship Name</b> Participant
	Relationship Type Lookup
	<b>Refers To</b> Group, User
ParticipantRoleId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The participant role associated with the funding award participant.
	This field 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.

#### FundingAwardParticipantFeed

Feed tracking is available for the object.

#### FundingAwardParticipantHistory

History is available for tracked fields of the object.

# **FundingAwardRequirement**

Represents a deliverable or milestone for a funding award or funding disbursement. 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 Calls**

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

### **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
ApprovalStatus	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the approval status the information that's submitted against the requirements.
	Possible values are:  • Approved
	• In Review
	<ul><li>New</li><li>Rejected</li></ul>
AssignedContactId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The contact who is responsible for submitting the requirement.

Grantmaking FundingAwardRequirement

Field	Details
	This field is a relationship field.
	Relationship Name
	AssignedContact
	<b>Relationship Type</b> Lookup
	Refers To Contact
AssignedUserId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The user who submits the funding requirement.
	This field is a relationship field.
	Relationship Name AssignedUser
	Relationship Type Lookup
	Refers To User
Description	<b>Type</b> textarea
	Properties Create, Nillable, Update
	<b>Description</b> The description of the funding requirement.
DueDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The last date and time of submitting the requirement.
FundingAwardId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Sort

Field	Details
	<b>Description</b> Funding award that's associated with the funding requirement.
	This field is a relationship field.
	<b>Relationship Name</b> FundingAward
	Relationship Type  Master-Detail
	Refers To FundingAward
FundingDisbursementId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding disbursement that's associated with the requirement. The funds are disbursed only after the requirements are fulfilled.
	This field is a relationship field.
	<b>Relationship Name</b> Funding Disbursement
	Relationship Type Lookup
	Refers To FundingDisbursement
IsSubmitted	<b>Type</b> boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the requirement for the funding award has been submitted (true) or not (false).
	This field is available from API version 58.0 and later.
	The default value is false.
LastReferencedDate	Type dataTime
	dateTime
	<b>Properties</b> Filter, Nillable, Sort

Grantmaking FundingAwardRequirement

Field	Details
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the funding requirement.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	<b>Refers To</b> Group, User
Status	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the funding requirement.
	Possible values are:
	• Approved
	• Delayed
	• In Progress

Field	Details
	• Open
	• Rejected
	• Submitted
SubmittedDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The actual date and time when the requirement was submitted.
Туре	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	Specifies the type of funding requirement.
	Possible values are:
	Combined Report
	• Contract
	• Financial Report
	• Narrative Report

### **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.

### FundingAwardRequirementFeed

Feed tracking is available for the object.

### FundingAwardRequirementHistory

History is available for tracked fields of the object.

#### Funding Award Rqmt Section Owner Sharing Rule

Sharing rules are available for the object.

# FundingAwardRqmtSection

Represents a part of a funding award requirement to be completed or reviewed. This object is available in API version 62.0 and later.

(1) 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 Calls**

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

# **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
ApplicationStageDefinitionId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The application stage definition associated with the funding award requirement section.
	This field is a relationship field.
	Relationship Name ApplicationStageDefinition
	Relationship Type Lookup
	Refers To ApplicationStageDefinition
AssignedUserId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The user assigned to complete the funding award requirement section.
	This field is a relationship field.
	Relationship Name AssignedUser
	Relationship Type Lookup
	<b>Refers To</b> User
Description	Туре
	string

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The description of the funding award requirement section.
DisplayOrder	Type int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The order in which the funding award requirement section shows on the form.
DueDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the funding award requirement section is due.
EndDateTime	Type dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the funding award requirement section ends.
FundingAwardRequirementId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The parent funding award requirement associated with the funding award requirement section.
	This field is a relationship field.
	Relationship Name FundingAwardRequirement
	Relationship Type  Master-detail
	<b>Refers To</b> FundingAwardRequirement (the master object)

Field	Details
IsAssignedToMe	Туре
	boolean
	Properties
	Defaulted on create, Filter, Group, Sort
	<b>Description</b> Indicates whether the requirement section is assigned to the logged in user (true) or not (false). This field can be used to filter the sections assigned to the user.
	The default value is false.
	This field is a calculated field.
IsRequired	<b>Type</b> boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the funding award requirement section is required (true) or not (false).
	The default value is false.
IsSubmitted	<b>Type</b> boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the funding award requirement section has been submitted (true) or not (false).
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Туре
	dateTime
	Properties
	Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Туре
	string
	Properties  Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the funding award requirement section
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	<b>Relationship Name</b> Owner
	<b>Refers To</b> Group, User
StartDateTime	<b>Type</b> dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the funding award requirement section starts.
Status	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the funding award requirement section.
	Possible values are:
	• Canceled
	• Completed
	• In Progress
	• Not Started

Grantmaking Funding Disbursement

### **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.

#### FundingAwardRqmtSectionHistory

History is available for tracked fields of the object.

#### FundingAwardRequirementFeed

Feed tracking is available for the object.

#### Funding Award Rqmt Section Owner Sharing Rule

Sharing rules are available for the object.

#### Funding Award Rqmt Section Share

Sharing is available for the object.

# **FundingDisbursement**

Represents a payment that has been made or scheduled to be made to a funding recipient. 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 Calls**

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

### **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
Amount	Туре
	currency
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total amount that's disbursed to the awardee.
DisbursementDate	Туре
	dateTime
	Properties
	Create, Filter, Nillable, Sort, Update

Grantmaking Funding Disbursement

Field	Details
	<b>Description</b> The actual date and time of funds disbursement.
FundingAwardId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The funding award that's associated with the funding disbursement.
	This field is a relationship field.
	<b>Relationship Name</b> Funding Award
	Relationship Type  Master-Detail
	Refers To Funding Award
IsApproved	<b>Type</b> boolean
	<b>Properties</b> Defaulted on create, Filter, Group, Sort
	Description
	Indicates whether the funding disbursement is approved (true) or not (false).
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	Туре
	string

Grantmaking FundingDisbursement

Field	Details
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The autogenerated name of the funding disbursement.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The owner of the record.
	This field is a polymorphic relationship field.
	This field is available from API version 63.0 and later.
	<b>Relationship Name</b> Owner
	<b>Refers To</b> Group, User
PaymentMethodType	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the payment method for funds disbursement.
	Possible values are:
	• Cash
	• Check
	• EFT
	• Wire
PaymentNumber	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, Sort
	<b>Description</b> The unique identifier of the payment related to the funds disbursement.
ScheduledDate	<b>Type</b> dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update
	Description
	The scheduled date and time to disburse the funds.
Status	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the approval status of the funds disbursement.
	Possible values are:
	• Approved
	• Cancelled
	• Paid
	• Pending Approval
	• Processing
	• Returned
	• Scheduled

## **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.

#### FundingDisbursementShare

Sharing is available for the object.

### Funding Disbursement Owner Sharing Rule

Sharing rules are available for the object.

### FundingDisbursementFeed

Feed tracking is available for the object.

### FundingDisbursementHistory

History is available for tracked fields of the object.

# **FundingOpportunity**

The pool of money available for distribution for a specific purpose. 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()

# Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
ActionPlanTemplateId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The action plan template that represents the application sections for this funding opportunity.
	Relationship Name
	ActionPlanTemplate
	Refers To
	ActionPlanTemplate
ApplicationInstructions	Туре
	textarea
	Properties
	Create, Nillable, Update
	Description
	The instructions on how to apply for the funding opportunity.
ApplicationTimelineId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The application timeline associated with the opportunity that describes the milestones in
	the application process.
	This field is a relationship field.
	Relationship Name
	ApplicationTimeline
	Relationship Type
	Lookup
	Refers To
	ApplicationTimeline
BudgetTemplateId	Туре
	reference

Field	Details
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The budget that's used as a template by the applicants when they apply for the funding opportunity.
	This field is a relationship field.
	Relationship Name  BudgetTemplate
	Relationship Type Lookup
	Refers To  Budget
Description	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	<b>Description</b> The description about the opportunity in terms of the minimum award requirements and expected outcome.
EndDate	<b>Type</b> dateTime
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the acceptance of funding opportunity applications ended.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.

Field	Details
MaximumFundingAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The maximum fund amount that's awarded.
MinimumFundingAmount	Туре
	currency
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The minimum fund amount that's awarded.
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the funding opportunity.
OwnerId	Туре
	reference
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	ID of the owner who owns the record.s
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
ParentFundingOpportunityId	Туре
·	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The associated parent funding opportunity.

Field	Details
	This field is available from API version 59.0 and later.
	This field is a relationship field.
	Relationship Name ParentFundingOpportunity
	Relationship Type  Lookup
	Refers To FundingOpportunity
ProgramId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program associated with the funding opportunity.
	This field is available from API version 58.0 and later.
	This field is a relationship field.
	Relationship Name Program
	<b>Relationship Type</b> Lookup
	Refers To Program
StartDate	<b>Type</b> dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the acceptance of funding opportunity applications started.
Status	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the funding opportunity.
	Possible values are:
	• Active
	• Cancelled

Grantmaking FundingOppParticipant

Field	Details
	• Completed
	• Planned

### **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.

#### **FundingOpportunityFeed**

Feed tracking is available for the object.

#### **FundingOpportunityHistory**

History is available for tracked fields of the object.

### Funding Opportunity Owner Sharing Rule

Sharing rules are available for the object.

#### FundingOpportunityShare

Sharing is available for the object.

# **FundingOppParticipant**

Represents information about a user or group of participants who have access to a funding opportunity. This object is available in API version 60.0 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 Calls**

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

### **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
Comments	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Grantmaking FundingOppParticipant

Field	Details
	Description
	The comments about why the participant has access to the funding opportunity.
FundingOpportunityId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The funding opportunity associated with the funding opportunity participant.
	This field is a relationship field.
	Relationship Name FundingOpportunity
	Relationship Type  Master-Detail
	Refers To FundingOpportunity
IsParticipantActive	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the funding opportunity participant is currently active (true) or not (false).
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.

Grantmaking FundingOppParticipant

Field	Details
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the funding opportunity participant.
ParticipantId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The participant associated with the funding opportunity.
	This field is a polymorphic relationship field.
	Relationship Name Participant
	Relationship Type Lookup
	<b>Refers To</b> Group, User
ParticipantRoleId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The participant role associated with the funding opportunity participant.
	This field is a relationship field.
	<b>Relationship Name</b> 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.

#### FundingOppParticipantFeed

Feed tracking is available for the object.

### FundingOppParticipantHistory

History is available for tracked fields of the object.

# IndicatorAssignment

Represents the assignment of an indicator definition that's used to measure the performance of an outcome or a related activity This object is available in API version 59.0 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 Calls

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

### **Special Access Rules**

This object is available in products:

- That include the Outcome Management and Grantmaking licenses.
- Where Outcome Management and Grantmaking are enabled.
- The Manage Applications, Manage Funding Awards, Manage Outcomes, and Use Grantmaking system permissions are assigned to users.

Field	Details
FundingAwardId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding award that the indicator assignment measures.
	This field is a relationship field.
	<b>Relationship Name</b> FundingAward
	Relationship Type Lookup
	<b>Refers To</b> FundingAward

Field	Details
FundingOpportunityId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding opportunity that the indicator assignment measures.
	This field is a relationship field.
	Relationship Name FundingOpportunity
	Relationship Type Lookup
	Refers To FundingOpportunity
IndicatorAssignmentType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Specifies the object that the indicator assignment measures.
	Possible values are:
	• Outcome
	• Program
IndicatorDefinitionId	Туре
	reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The indicator definition that's associated with the indicator assignment.
	This field is a relationship field.
	Relationship Name IndicatorDefinition
	Relationship Type  Master-detail
	Refers To Indicator Definition (the master object)
IndividualApplicationId	туре
	reference

Field	Details
	Properties 5th Company to the London State of
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The individual application that the indicator assignment measures.
	This field is a relationship field.
	Relationship Name Individual Application
	Relationship Type Lookup
	Refers To Individual Application
IntendedDirection	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the intended direction of change in the behavior, knowledge, skills, status, or level of functioning that's detailed in the parent indicator definition.
	Possible values are:
	• Decrease
	• Increase
	• Maintain
LastReferencedDate	<b>Type</b> dateTime
	Properties
	Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	Description  The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.

Field	Details
Name	Туре
	string
	Properties
	Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the indicator assignment.
OutcomeId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The outcome that the indicator assignment measures.
	This field is a relationship field.
	Relationship Name Outcome
	Relationship Type Lookup
	Refers To Outcome
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The owner of this indicator assignment.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type  Lookup
	Refers To Group, User
ProgramId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program that the indicator assignment measures.

Grantmaking IndicatorPerformancePeriod

Field	Details
	This field is a relationship field.
	Relationship Name Program
	Relationship Type Lookup
	Refers To Program
Status	<b>Type</b> picklist
	Properties Create, Filter, Group, Sort, Update
	<b>Description</b> Specifies the status of the indicator assignment. Possible values are:
	• Active
	<ul><li>Canceled</li><li>Completed</li><li>Planned</li></ul>

### **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.

#### IndicatorAssignmentFeed

Feed tracking is available for the object.

#### IndicatorAssignmentHistory

History is available for tracked fields of the object.

### Indicator Assignment Owner Sharing Rule

Sharing rules are available for the object.

#### IndicatorAssignmentShare

Sharing is available for the object.

### **IndicatorPerformancePeriod**

Represents information about a specified time period including the frequency at which indicator results should be calculated and the baseline value of the indicator. This object is available in API version 59.0 and later.

(1) 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.

Grantmaking IndicatorPerformancePeriod

# **Supported Calls**

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

# **Special Access Rules**

This object is available in products:

- That include the Outcome Management and Grantmaking licenses.
- Where Outcome Management and Grantmaking are enabled.
- The Manage Applications, Manage Funding Awards, Manage Outcomes, and Use Grantmaking system permissions are assigned to users.

Field	Details
BaselineDescription	<b>Type</b> textarea
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The description of the baseline value.
BaselineValue	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The value of the indicator assignment at the beginning of the indicator performance period.
Description	Type textarea
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The description of the indicator performance period.
FundingAwardRequirementId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding award requirement that's associated with the indicator performance period.

Grantmaking IndicatorPerformancePeriod

Field	Details
	This field is a relationship field.
	Relationship Name FundingAwardRequirement
	Relationship Type Lookup
	<b>Refers To</b> FundingAwardRequirement
IndicatorAssignmentId	Type reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The indicator assignment that is associated with the indicator performance period.
	This field is a relationship field.
	Relationship Name IndicatorAssignment
	Relationship Type  Master-detail
	Refers To Indicator Assignment (the master object)
LastReferencedDate	Type dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastResultMeasurementDate	<b>Type</b> date
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The date when the last result value was measured.
	This field is a calculated field.
LastResultValue	<b>Type</b> double

Grantmaking IndicatorPerformancePeriod

Field	Details
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The result value from the most recently measured indicator result.
	This field is a calculated field.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Type
	string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the indicator performance period.
TargetProgress	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the progress of the target within the time period.
	Possible values are:
	• At Risk
	• Complete
	• Not Met
	• Not Started
	• On Track
TargetValue	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The target value of the indicator assignment within the time period.

Field	Details
TimePeriodId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The time period that is associated with the indicator performance period.
	This field is a relationship field.
	Relationship Name TimePeriod
	Relationship Type Lookup
	<b>Refers To</b> TimePeriod

### **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.

### IndicatorPerformancePeriodFeed

Feed tracking is available for the object.

#### IndicatorPerformancePeriodHistory

History is available for tracked fields of the object.

# IndividualApplication

Represents an application form submitted by an individual or organization. This object is available in API version 50.0 and later.

## Supported Calls

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

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The ID of the applicant's account.
	This is a relationship field.
	Relationship Name Account
	Relationship Type Lookup
	Refers To Account
ApplicationCaseId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The ID of a case that relates to this application.
	This is a relationship field.
	Relationship Name ApplicationCase
	Relationship Type Lookup
	<b>Refers To</b> Case
ApplicationChangeOverview	Type textarea
	Properties Create, Nillable, Update
	<b>Description</b> The Einstein-generated historical overview of the changes between application versions.
	Available in API versions 62.0 and later. Einstein Generative AI for Public Sector Solutions must be enabled.
ApplicationName	Type string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	Descriptive name for the application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup.
	Available from API version 57.0 and later.

Field	Details
ApplicationOverview	Туре
	textarea
	Properties Create, Nillable, Update
	<b>Description</b> The Einstein-generated historical overview of application stages, data changes, and processing actions.
	Available in API versions 62.0 and later. Einstein Generative AI for Public Sector Solutions must be enabled.
ApplicationReferenceNumber	<b>Type</b> string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The custom reference number assigned to the application. This field is available if you enabled Health Cloud, Public Sector Solutions, or Grantmaking in Setup.
ApplicationType	<b>Type</b> picklist
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The type of the application.
	Possible values are:
	<ul> <li>Change Of Circumstance—Available in API versions 62.0 and later with Public Sector Solutions.</li> </ul>
	<ul> <li>ChangeOfCircumstance—Available in API versions 60.0 and 61.0 with Public Sector Solutions.</li> </ul>
	• New
	<ul> <li>Recertification—Available in API version 60.0 and later with Public Sector Solutions.</li> </ul>
	• Renewal
AppliedDate	Type dateTime
	Properties
	Create, Filter, Sort, Update
	Description
	The date on which the application was received from the applicant.

Field	Details
ApprovedDate	Туре
	dateTime
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date on which the application was approved.
BudgetId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The budget associated with the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup.
	Available from API version 57.0 and later.
	This field is a relationship field.
	Relationship Name  Budget
	Relationship Type Lookup
	Refers To  Budget
Category	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The service category of the application.
	Possible values are:
	• License
	• Permit
	• Grant Application
	Letter of Intent
ContactId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The contact associated with the individual application.
	This field is a relationship field.
	Relationship Name Contact
	Relationship Type Lookup
	Refers To Contact
Description	<b>Type</b> string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Text description provided by the applicant.
FundingOpportunityId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding opportunity associated with the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup.
	Available in API version 57.0 and later.
	This field is a relationship field.
	Relationship Name FundingOpportunity
	Relationship Type Lookup
	Refers To FundingOpportunity
FundingRequestPurpose	<b>Type</b> textarea
	<b>Properties</b> Create, Nillable, Update
	Description
	Description of what the individual application funds are used for. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup.
	Available in API version 57.0 and later.

Field	Details
InternalStatus	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Status of the individual application in Salesforce CRM.
	Available in API version 57.0 and later.
	Possible values are:
	• Invited
	• In Progress
	• Submitted
	Application Accepted
	Revision Requested
	• In Review
	• Approved
	• Denied
IsOwnerEditable	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	Description  Whather the owner ID of this record can be shaped
	Whether the owner ID of this record can be changed.  The default value is 'false'.
IsSubmitted	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the individual application has been submitted. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup.
	Available in API version 58.0 and later.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when a user most recently viewed a record related to this record.

Field	Details
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when a user most recently viewed this record. If this value is null, this record might only have been referenced (LastReferencedDate) and not viewed.
Name	<b>Type</b> string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The auto-generated unique ID for this application.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the user that owns this record.
	This is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
RecordTypeId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The record associated to the application.
	This is a relationship field.
	Relationship Name RecordType
	Relationship Type  Lookup

Field	Details
	Refers To RecordType
RequestedAmount	<b>Type</b> currency
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> Amount requested in the individual application. This field is available if you enabled Public Sector Solutions or Grantmaking in Setup.
	Available in API version 57.0 and later.
RequirementsCompleteDate	<b>Type</b> dateTime
	Properties
	Create, Filter, Nillable, Sort, Update  Description  The date when the applicant fulfilled all the requirements for approval.
SavedApplicationRefId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Reference Id of the saved application.
	This is a relationship field.
	<b>Relationship Name</b> SavedApplicationRef
	Relationship Type Lookup
	Refers To PreliminaryApplicationRef
Status	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The submission and approval status of the application.
	Possible values are:
	• Invited

Field	Details
	• In Progress
	• Submitted
	• Application Accepted
	• Revision Requested
	• In Review
	• Approved
	• Denied
WasReturned	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Whether a submitted application was sent back to the applicant due to errors.
	The default value is 'false'.

### **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.

### IndividualApplicationChangeEvent (API Version 55.0)

Change events are available for the object.

#### IndividualApplicationFeed

Feed tracking is available for the object.

### IndividualApplicationHistory

History is available for tracked fields of the object.

#### IndividualApplicationOwnerSharingRule

Sharing rules are available for the object.

### Individual Application Share

Sharing is available for the object.

# Individual Application Task

Represents a task related to an application. This object is available in Grantmaking API version 61.0 and later.

## **Supported Calls**

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

# Special Access Rules

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
ApplicationStageDefinitionId	<b>Type</b> reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The application stage definition associated with the individual application task.
	This field is a relationship field.
	Relationship Name ApplicationStageDefinition
	Relationship Type Lookup
	Refers To ApplicationStageDefinition
Description	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Describes the details of the task to be completed.
DueDate	Type date
	Properties  Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the individual application task must be completed.
DueDate	<b>Type</b> date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the individual application task must be completed.

Field	Details
EndDateTime	Туре
	dateTime
	Properties  Create, Filter, Nillable, Sort, Update
	<b>Description</b> The date and time when the individual application task ends.
IndividualApplicationId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The individual application associated with the individual application task.
	This field is a relationship field.
	Relationship Name Individual Application
	Relationship Type Lookup
	Refers To Individual Application
IsRequired	Type boolean
	Properties Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the individual application task is required (true) or not (false).
	The default value is false.
IsSubmitted	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the individual application task has been submitted.
	The default value is false.
LastReferencedDate	Type dateTime
	<b>Properties</b> Filter, Nillable, Sort

Field	Details
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the individual application task.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the user who owns the record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
PreliminaryApplicationF	Refid <b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The parent funding award for this funding award.
	This field is a relationship field.

Field	Details
	Relationship Name
	PreliminaryApplicationRef
	Relationship Type Lookup
	<b>Refers To</b> PreliminaryApplicationRef
SavedApplicationUrl	<b>Type</b> url
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The URL of a saved application that's associated with the individual application task.
SequenceNumber	<b>Type</b> int
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The sequence in which the individual application task must be performed.
StartDateTime	<b>Type</b> dateTime
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The date and time when the individual application task starts.
Status	<b>Type</b> picklist
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Specifies the status of the individual application task.
	Possible values are:
	• Cancelled
	• Completed
	• In Progress
	Not Started

Field	Details
Туре	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the type of the individual application task.
	Possible values are:
	• Grantmaking

### **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.

### IndividualApplicationTaskFeed

Feed tracking is available for the object.

#### IndividualApplicationTaskHistory

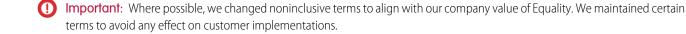
History is available for tracked fields of the object.

### Individual Application Task Share

Sharing is available for the object.

## IndvApplicationTaskParticipant

Represents information about a user or group of participants who have read or write access to an individual application task. This object is available in API version 61.0 and later.



### **Supported Calls**

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

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Applications system permission is assigned to users.

Field	Details
Comments	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The reasons why a participant is involved in an individual application task.
IndividualApplicationTaskId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The individual application task associated with the individual application task participant.
	This field is a relationship field.
	Relationship Name IndividualApplicationTask
	Relationship Type  Master-Detail
	Refers To Individual Application Task (the master object)
IsParticipantActive	Type boolean
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	Description Indicates if the participant is currently active.
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	Type dateTime

Field	Details
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the individual application task participant.
ParticipantId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The participant associated with the individual application task.
	This field is a polymorphic relationship field.
	Relationship Name Participant
	Relationship Type Lookup
	<b>Refers To</b> Group, User
ParticipantRoleId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort, Update
	<b>Description</b> The participant role associated with the individual application task participant.
	This field 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.

### IndvApplication Task Participant Feed

Feed tracking is available for the object.

#### IndvApplicationTaskParticipantHistory

History is available for tracked fields of the object.

# Individual Appln Participant

Represents information about a user or group of participants who have access to a individual application. This object is available in API version 59.0 and later.



(1) 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 Calls**

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

### **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Funding Awards system permission is assigned to users.

Field	Details
Comments	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The comments about why the participant has access to the individual application.
IndividualApplicationId	Type reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The individual application associated with the individual application participant. This field is a relationship field.

Grantmaking Individual Appln Participant

Field	Details
	Relationship Name IndividualApplication
	Relationship Type
	Master-Detail
	Refers To Individual Application
IsParticipantActive	<b>Type</b> boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the individual application participant is currently active (true) or not (false).
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	Properties Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the individual application participant.
ParticipantId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort

Field	Details
	<b>Description</b> The participant associated with the individual application.
	This field is a polymorphic relationship field.
	Relationship Name Participant
	Relationship Type Lookup
	<b>Refers To</b> Group, User
ParticipantRoleId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort, Update
	<b>Description</b> The participant role associated with the individual application participant.
	This field is a relationship field.
	<b>Relationship Name</b> 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.

### IndividualAppInParticipantFeed

Feed tracking is available for the object.

### IndividualAppInParticipantHistory

History is available for tracked fields of the object.

## OutcomeActivity

Represents a junction between an outcome and the object that's related to the activity undertaken by an organization to achieve that outcome. This object is available in API version 59.0 and later.

(1)

**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 Calls**

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

### **Special Access Rules**

This object is available in products:

- That include the Outcome Management and Grantmaking licenses.
- Where Outcome Management and Grantmaking are enabled.
- The Manage Applications, Manage Funding Awards, Manage Outcomes, and Use Grantmaking system permissions are assigned to users.

Field	Details
BenefitId	<b>Type</b> reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The benefit that's associated with the outcome.
	This field is a relationship field.
	<b>Relationship Name</b> Benefit
	Relationship Type Lookup
	<b>Refers To</b> Benefit
FundingAwardId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding award that's associated with the outcome.
	This field is a relationship field.
	<b>Relationship Name</b> FundingAward
	Relationship Type Lookup

Field	Details
	<b>Refers To</b> FundingAward
FundingOpportunityId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The funding opportunity that's associated with the outcome.
	This field is a relationship field.
	Relationship Name FundingOpportunity
	Relationship Type Lookup
	Refers To FundingOpportunity
GoalDefinitionId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The goal definition that's associated with the outcome. This field is available from API version 60.0 and later.
	This field is a relationship field.
	Relationship Name GoalDefinition
	Relationship Type Lookup
	Refers To GoalDefinition
IndividualApplicationId	Type reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The individual application that's associated with the outcome.
	This field is a relationship field.
	Relationship Name Individual Application

Field	Details
	Relationship Type Lookup
	Refers To Individual Application
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the outcome activity.
OutcomeActivityType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Specifies the type of activity that's associated with the outcome
	Possible values are:
	<ul> <li>Benefit</li> <li>Goal Definition This value is available from API version 60.0 and later.</li> <li>Program</li> </ul>
OutcomeId	<b>Type</b> reference

Field	Details
	Properties Create, Filter, Group, Sort
	<b>Description</b> The outcome that's associated with the outcome.
	This field is a relationship field.
	Relationship Name Outcome
	Relationship Type  Master-detail
	Refers To Outcome (the master object)
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The owner of the record.
	This field is a polymorphic relationship field.
	This field is available from API version 63.0 and later.
	Relationship Name Owner
	<b>Refers To</b> Group, User
ProgramId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The program that's associated with the outcome.
	This field is a relationship field.
	Relationship Name Program
	Relationship Type Lookup
	Refers To Program

Grantmaking PreliminaryApplicationRef

# **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.

### OutcomeActivityShare

Sharing is available for the object.

#### OutcomeActivityOwnerSharingRule

Sharing rules are available for the object.

### OutcomeActivityFeed

Feed tracking is available for the object.

### OutcomeActivityHistory

History is available for tracked fields of the object.

# PreliminaryApplicationRef

Represents the saved applications and pre-screening forms. This object is available in API version 49.0 and later.

### **Supported Calls**

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

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Field	Details
ApplicantId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> ID of the applicant for the application.
	This field is a relationship field.
	Relationship Name Applicant
	Relationship Type Lookup
	Refers To Contact

Grantmaking PreliminaryApplicationRef

Field	Details
ApplicationCategory	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The category of the application
ApplicationName	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Name of the preliminary application.
ApplicationType	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Type of application.
	Possible values are:
	<ul> <li>BusinessLicenseApplication—Business License Application</li> </ul>
	BusinessPrescreening—License Requirement Assessment
	<ul> <li>IndividualApplication—Individual Application</li> </ul>
BusinessAccountNameId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	ID of the account related to the application.
	This field is a relationship field.
	Relationship Name BusinessAccountName
	Relationship Type Lookup
	Refers To
	Account
IsSubmitted	Туре
	boolean

Grantmaking PreliminaryApplicationRef

Field	Details
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the application was submitted.
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp for when the current user last viewed this record.
Name	Type
	string  Properties  Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> Name of the preliminary application.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner who owns the record.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User

Field	Details
SavedApplicationUrl	<b>Type</b> url
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Relative path of the saved application.
SubmissionDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the application was submitted.

### **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.

### PreliminaryApplicationRefFeed

Feed tracking is available for the object.

### PreliminaryApplicationRefHistory

History is available for tracked fields of the object.

### PreliminaryApplicationRefOwnerSharingRule

Sharing rules are available for the object.

### PreliminaryApplicationRefShare

Sharing is available for the object.

# Program

Represents information about the enrollment and disbursement of benefits in a program. 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()

Field	Details
ActiveEnrolleeCount	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description  The count of program enrollees with IsActive on ProgramEnrollment selected. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
AdditionalContext	<b>Type</b> textarea
	Properties Create, Nillable, Update
	<b>Description</b> The additional context about the program.
CurrentMonthDisbCount	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The count of benefits disbursed in the current month. Data Processing Engine calculates this
	field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
CurrentYearDisbCount	<b>Type</b> double
	Properties Create, Filter, Nillable, Sort, Update
	<b>Description</b> The count of benefits disbursed in the current year. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
EndDate	Туре
	date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update

Field	Details
	<b>Description</b> The date when the program ends.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view.
Name	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of the program.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The user who owns the object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User

Field	Details
ParentProgramId	Туре
	reference
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The associated parent program.
	This field is available from API version 59.0 and later.
	This field is a relationship field.
	Relationship Name
	ParentProgram
	Relationship Type
	Lookup
	Refers To
	Program
PreviousMonthDisbCount	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The count of benefits disbursed in the previous month. Data Processing Engine calculates
	this field if you activate the Program Management Data Processing Engine Definition
	templates in Setup. You can schedule this calculation to run on a regular basis.
PreviousYearDisbCount	Туре
	double
	Properties
	Create, Filter, Nillable, Sort, Update
	Description
	The count of benefits disbursed in the previous year. Data Processing Engine calculates this
	field if you activate the Program Management Data Processing Engine Definition templates
	in Setup. You can schedule this calculation to run on a regular basis.
StartDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the program begins.

Field	Details
Status	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The status of the program.
	Possible values are:
	• Active
	• Cancelled
	• Completed
	• Planned
	This field is accessible if you enabled Data Protection and Privacy in Setup.
Summary	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The summary of the program.
TotalEnrolleeCount	<b>Type</b> double
	<b>Properties</b> Create, Filter, Nillable, Sort, Update
	<b>Description</b> The total count of enrollees in the program. Data Processing Engine calculates this field if you activate the Program Management Data Processing Engine Definition templates in Setup. You can schedule this calculation to run on a regular basis.
UsageType	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the usage type of the program.
	Possible value is ProgramManagement.

### **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.

### ProgramFeed

Feed tracking is available for the object.

#### **ProgramHistory**

History is available for tracked fields of the object.

#### ProgramOwnerSharingRule

Sharing rules are available for the object.

## **Grantmaking Tooling API Object**

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.

### Application Record Type Config

Represents the configuration that maps object record types to an application. This object is available in API version 57.0 and later.

# ApplicationRecordTypeConfig

terms to avoid any effect on customer implementations.

Represents the configuration that maps object record types to an application. This object is available in API version 57.0 and later.

API version 57.0 and later.

Supported SOAP API Calls

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

### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

## **Special Access Rules**

This object is available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain

### **EDITIONS**

Available in: Lightning Experience

Available in: Enterprise, Performance, and Unlimited Editions in Nonprofit Cloud for Grantmaking

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions in Public Sector Solutions

Field	Details
ApplicationUsageType	<b>Type</b> picklist
	Properties  Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> Count of application records used by Grantmaking.
	Possible values are:
	BA—Benefit Assistance
	CCM—Composable Case Management
	EDU—Education Cloud
	• Grantmaking
	• HC—Health Cloud
	• ERM—Others
	• LPI—Public Sector Solutions
DeveloperName	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The unquie name for ApplicationRecordTypeConfig.
	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 underscore. 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 chang are reflected in a subscriber's organization. Label is <b>Record Type Name</b> . This field is automatically generated, but you can supply your own value if you create the record usin the API.
	Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance may slow while Salesforce generates one for each record.
Language	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The language of the ApplicationRecordTypeConfig.

Field	Details
	Possible values are:
	<ul> <li>The language of the account record type configuration.</li> </ul>
	• da—Danish
	• de—German
	<ul><li>en_US—English</li></ul>
	• es—Spanish
	• es_MX—Spanish (Mexico)
	• fi—Finnish
	• fr—French
	• it—Italian
	• ja—Japanese
	• ko—Korean
	• nl_NL—Dutch
	• no—Norwegian
	<ul><li>pt_BR—Portuguese (Brazil)</li></ul>
	• ru—Russian
	• sv—Swedish
	• th—Thai
	• zh_CN—Chinese (Simplified)
	• zh_TW—Chinese (Traditional)
MasterLabel	Туре
	string
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Label for the ApplicationRecordTypeConfig. In the UI, this field is Application Record Type Configuration.
	Conniguration.
ObjectName	Туре
	picklist
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Objects used by Grantmaking.
	Possible values are:
	<ul> <li>IndividualApplication—Individual Application</li> </ul>

### ${\tt RecordTypeName}$

### Туре

string

Field	Details
	<b>Properties</b> Create, Filter, Group, idLookup, Sort, Update
	<b>Description</b> The name of record type that was created for Individual Application.

# Grantmaking Metadata API Types

Metadata API enables you to access some types and feature settings that you can customize in the user interface. For more information about Metadata API.

Find a complete reference of existing metadata types, see Metadata API Developer Guide.

## IndustriesSettings

Represents the settings for Grantmaking

# IndustriesSettings

Represents the settings for Grantmaking

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

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

# File Suffix and Directory Location

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

# Version

Industries settings for Grantmaking are available in API version 59.0 and later.

# **Special Access Rules**

Unless noted otherwise, these settings are available only if the Grantmaking license is enabled, Grantmaking is enabled, and the Manage Application system permission is assigned to users.

# **Fields**

Industries settings for Grantmaking are available in API version 59.0 and later.

Grantmaking IndustriesSettings

Field Name	Field Type	Description
enableCompliantDataSharingForBudget	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Budget object. The default is false. Available only if the Grantmaking license is enabled and Grantmaking is enabled.
enableCompliantDataSharingForIndividualApplication	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Individual Application object. The default is false. Available only if the Grantmaking license is enabled and Grantmaking is enabled.
enableCompliantDataSharingForFundingAward	boolean	Indicates whether the Compliant Data Sharing feature is enabled for the Funding Award object. The default is false. Available only if the Grantmaking license is enabled and Grantmaking is enabled.
enableGrantmaking	boolean	Indicates whether the Grantmaking feature is enabled. The default is false. This option can't be disabled (false) once it's enabled (true). Only requires that the Grantmaking license is enabled in the org.

# Declarative Metadata Sample Definition

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

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesSettings xmlns="http://soap.sforce.com/2006/04/metadata">
    <enableGrantmaking>true</enableGrantmaking>
    <enableCompliantDataSharingForBudget>true</enableCompliantDataSharingForIndividualApplication>true</enableCompliantDataSharingForIndividualApplication>
</enableCompliantDataSharingForIndividualApplication>true</enableCompliantDataSharingForIndividualApplication>
</nableCompliantDataSharingForFundingAward>true</enableCompliantDataSharingForFundingAward>
</nableCompliantDataSharingForFundingAward>true</enableCompliantDataSharingForFundingAward>
</nableCompliantDataSharingForFundingAward>true</enableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCompliantDataSharingForFundingAward></nableCom
```

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

# **CHAPTER 8** Group Memberships and Households in Nonprofit Cloud

# In this chapter ...

- Group Membership and Households Standard Objects
- Group Membership and Households Business APIs

This guide provides information about the Group Memberships objects and APIs that Nonprofit Cloud uses.

# EDITIONS

Available in: Lightning Experience

Available in: **Enterprise Unlimited** and **Developer**Editions.

# Group Membership and Households Standard Objects

The Group Membership and Households data model provides objects and fields to represent the relationships used for group memberships.

#### AccountAccountRelation

Represents a relationship between accounts, such as a relationship between a business account and a household account. This object is available in API version 57.0 and later.

#### AccountContactRelation

Standard and custom fields extend the standard Account object for use in Public Sector Solutions to represent information of members in a household. This object is available in API version 56.0 and later.

#### ContactContactRelation

Represents a relationship between contacts. This object is available in API version 57.0 and later.

## PartyRelationshipGroup

Represents a group of people living together such as a household, or a group of people affiliated with each other. This object is available in API version 56.0 and later.

#### PartyRoleRelation

Represents information about the type of relationship between the participants. This object is available in API version 57.0 and later.

# **AccountAccountRelation**

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

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> ID of the account associated with this account account relationship.
	This field is a relationship field.
	Relationship Name Account
	Relationship Type  Lookup

Field	Details
	Refers To Account
EndDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date when the relationship ends.
HierarchyType	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> Specifies the hierarchy between accounts that are related. For example, an account is related to another account as a parent, peer, or child.
	Possible values are:
	• Child
	• Parent
	• Peer
	The default value is Parent.
IsActive	<b>Type</b> boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	Description
	Indicates whether the account is actively involved with the related account.
	The default value is false.
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	<b>Type</b> dateTime

Field	Details
	<b>Properties</b> Filter, Nillable, Sort
	Description  The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view  ( <parmname>LastReferencedDate</parmname> ) but not viewed it.
Name	<b>Type</b> string
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> Name of the account account relationship.
OwnerId	<b>Type</b> reference
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	<b>Refers To</b> Group, User
PartyRoleRelationId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The relationship between two accounts.
	This field is a relationship field.
	<b>Relationship Name</b> PartyRoleRelation
	Relationship Type Lookup
	Refers To PartyRoleRelation

Field	Details
RelatedAccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The related account in the relationship.
	This field is a relationship field.
	Relationship Name RelatedAccount
	Relationship Type Lookup
	Refers To Account
RelatedInverseRecordId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The record that specifies the inverse relationship between the accounts.
	This field is a relationship field.
	Relationship Name RelatedInverseRecord
	Relationship Type Lookup
	Refers To AccountAccountRelation
StartDate	<b>Type</b> date
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description The date when the relationship starts.

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.

## AccountAccountRelationChangeEvent (API Version 63.0)

Change events are available for the object.

# AccountAccountRelationFeed

Feed tracking is available for the object.

# AccountAccountRelationHistory

History is available for tracked fields of the object.

#### AccountAccountRelationOwnerSharingRule

Sharing rules are available for the object.

## AccountAccountRelationShare

Sharing is available for the object.

# **AccountContactRelation**

Standard and custom fields extend the standard Account object for use in Public Sector Solutions to represent information of members in a household. This object is available in API version 56.0 and later.

For more information, see AccountContactRelation.

# **Supported Calls**

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

# **Special Access Rules**

Field	Details
AccountId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> Lookup to the Account object.
	This field is a relationship field.
	Relationship Name Account
	Relationship Type  Lookup
	Refers To Account

Field	Details
ContactId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> Lookup to the Contact object.
	This field is a relationship field.
	Relationship Name Contact
	Relationship Type Lookup
	Refers To Contact
DataRollupCategories	<b>Type</b> multipicklist
	Properties  Create, Filter, Nillable, Update
	<b>Description</b> Specifies the categories in which the data associated with a group is aggregated.
EndDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date a relationship between a contact and account ended. Use with the Start Date to keep a history of the relationship.
IsActive	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether relationship is active (true) or not (false).
	The default value is false.
IsDirect	Туре
	boolean
	Properties  Defaulted on create, Filter, Group, Sort

Field	Details
	Description
	Indicates whether relationship is direct (true) or not (false).
	The default value is false.
IsIncludedInGroup	<b>Type</b> boolean
	Properties  Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the data of a group or a business account is included in the Household (true) or not (false).
	The default value is false.
IsPrimaryGroup	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the group is a primary group for the member (yes) or not (no).
	The default value is false.
IsPrimaryMember	<b>Type</b> boolean
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the member is a primary contact of a group (true) or not (false).  The default value is false.
Roles	Туре
	multipicklist
	<b>Properties</b> Create, Filter, Nillable, Update
	Description
	The contact's participating role in the account.
	Possible values are:
	• Daughter
	• Father
	Husband
	• Mother

Field	Details
	• Other
	• Son
	• Wife
StartDate	<b>Type</b> date
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The date a relationship between a contact and account began. Use with the End Date to keep a history of the relationship

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.

# AccountContactRelationChangeEvent (API Version 59.0)

Change events are available for the object.

# ContactContactRelation

Represents a relationship between contacts. 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()

Field	Details
ContactId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> ID of the account associated with this contact contact relationship.
	This field is a relationship field.
	Relationship Name Contact

Field	Details
	Relationship Type
	Lookup
	Refers To
	Contact
EndDate	Туре
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The date when the relationship ends.
HierarchyType	Туре
	picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	Indicates the type of association to determine the hierarchy of relationship between the two
	parties.
	Possible values are:
	• Child
	• Parent
	• Peer
	The default value is Parent.
IsActive	Туре
	boolean
	Properties
	Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> Indicates whether the contact is actively involved with the related contact.
	The default value is false.
I a a + D a f a man a a d D a + a	
LastReferencedDate	Type
	dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record, a record related to this record,
	or a list view.

Field Details		
LastViewedDate	<b>Type</b> dateTime	
	Properties	
	Filter, Nillable, Sort	
	Description  The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view  ( <parmname>LastReferencedDate</parmname> ) but not viewed it.	
Name	Туре	
	string	
	<b>Properties</b> Autonumber, Defaulted on create, Filter, idLookup, Sort	
	Description	
	Name of the contact contact relationship.	
OwnerId	<b>Type</b> reference	
	Properties	
	Create, Defaulted on create, Filter, Group, Sort, Update	
	<b>Description</b> ID of the owner of this object.	
	This field is a polymorphic relationship field.	
	Relationship Name Owner	
	Relationship Type Lookup	
	<b>Refers To</b> Group, User	
PartyRoleRelationId	<b>Type</b> reference	
	Properties Create, Filter, Group, Sort, Update	
	<b>Description</b> The relationship between two contacts.	
	This field is a relationship field.	
	Relationship Name PartyRoleRelation	
	Relationship Type Lookup	

Field	Details		
	Refers To PartyRoleRelation		
RelatedContactId	<b>Type</b> reference		
	<b>Properties</b> Create, Filter, Group, Sort, Update		
	<b>Description</b> The related contact in the relationship.		
	This field is a relationship field.		
	Relationship Name RelatedContact		
	Relationship Type Lookup		
	Refers To Contact		
RelatedInverseRecordId	<b>Type</b> reference		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The record that specifies the inverse relationship between the contacts.		
	This field is a relationship field.		
	Relationship Name RelatedInverseRecord		
	Relationship Type Lookup		
	Refers To ContactContactRelation		
StartDate	<b>Type</b> date		
	Properties Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The date when the relationship starts.		

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.

# ContactContactRelationChangeEvent (API Version 63.0)

Change events are available for the object.

#### ContactContactRelationFeed

Feed tracking is available for the object.

## ContactContactRelationHistory

History is available for tracked fields of the object.

## ${\bf Contact Contact Relation Owner Sharing Rule}$

Sharing rules are available for the object.

## ContactContactRelationShare

Sharing is available for the object.

# PartyRelationshipGroup

Represents a group of people living together such as a household, or a group of people affiliated with each other. 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()

Field	Details
AccountId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort
	<b>Description</b> The parent account associated with the party relationship group.
	This field is a relationship field.
	Relationship Name Account
	Relationship Type  Master-detail
	Refers To Account (the master object)

Field	Details		
Category	Туре		
	picklist		
	Properties		
	Create, Filter, Group, Nillable, Sort, Update		
	Description		
	Specifies the category of the party relationship group.		
	Possible values are:		
	• Extended Family		
	• Meals together		
	Staying under same roof		
Description	Туре		
	textarea		
	Properties		
	Create, Filter, Group, Nillable, Sort, Update		
	Description		
	The description of the party relationship group.		
EndDate	Туре		
	date		
	Properties		
	Create, Filter, Group, Nillable, Sort, Update		
	Description		
	The end date associated with the party relationship group.		
GroupIncome	Туре		
	currency		
	Properties		
	Create, Filter, Nillable, Sort, Update		
	Description		
	The total income of the party relationship group.		
GroupSize	Туре		
	int		
	Properties		
	Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The number of active members associated with the party relationship group		
	The number of active members associated with the party relationship group.		
LastReferencedDate	Туре		
	dateTime		

Field	Details
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	Description
	The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	<b>Type</b> string
	Properties Create, Filter, Group, idLookup, Sort, Update
	Description
	The name of the party relationship group.
PrimaryAddress	Туре
	address
	<b>Properties</b> Filter, Nillable
	Description
	The primary address of the party relationship group.
PrimaryCity	Туре
	string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	Description
	The primary city of the party relationship group.
PrimaryCountry	<b>Type</b> string
	Properties Create, Filter, Group, Nillable, Sort, Update
	Description
	The primary country of the party relationship group.

Field	Details		
PrimaryGeocodeAccuracy	Туре		
	picklist		
	Properties		
	Create, Filter, Group, Nillable, Restricted picklist, Sort, Update		
	<b>Description</b> 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 party relationship group's latitude and longitude coordinates.		
	Possible values are:		
	• Address		
	• Block		
	• City		
	• County		
	ExtendedZip—Extended Zip		
	• NearAddress—Near Address		
	• Neighborhood		
	• State		
	• Street		
	• Unknown		
	• Zip		
PrimaryLatitude	<b>Type</b> double		
	Properties		
	Create, Filter, Nillable, Sort, Update		
	<b>Description</b> Used with Longitude to specify the precise geolocation of the party relationship group. Acceptable values are numbers between –90 and 90 with up to 15 decimal places.		
PrimaryLongitude	<b>Type</b> double		
	<b>Properties</b> Create, Filter, Nillable, Sort, Update		
	<b>Description</b> Used with Latitude to specify the precise geolocation of the party relationship group. Acceptable values are numbers between –180 and 180 with up to 15 decimal places.		
PrimaryPostalCode	<b>Type</b> string		
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update		

Field	Details
	<b>Description</b> The primary postal code of the party relationship group.
PrimaryState	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The primary state of the party relationship group.
PrimaryStreet	<b>Type</b> textarea
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The primary street of the party relationship group.
StartDate	<b>Type</b> date
	Properties  Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The start date associated with the party relationship group.
Status	<b>Type</b> picklist
	Properties  Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	<b>Description</b> The status of the party relationship group.
	Possible values are:
	• Active
	• Inactive
	The default value is Active.
Subtype	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The subclassification of the party relationship group type.

Field	Details		
	Possible values are:		
	• Extension Household		
	Nuclear Household		
	• Three Person Household		
Туре	Type picklist		
	picklist		
	Properties 5th Community of the Communit		
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update		
	Description		
	The type of the party relationship group.		
	Possible values are:		
	• Group		
	• Household		
	The default value is Group.		

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.

## PartyRelationshipGroupChangeEvent (API Version 63.0)

Change events are available for the object.

## PartyRelationshipGroupFeed

Feed tracking is available for the object.

# ${\bf Party Relations hip Group History}$

History is available for tracked fields of the object.

# **PartyRoleRelation**

Represents information about the type of relationship between the participants. 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()

Field	Details
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> 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	<b>Type</b> string
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> Name of the party role relationship.
OwnerId	Type reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner
	Relationship Type Lookup
	Refers To Group, User
RelatedInverseRecordId	<b>Type</b> reference

Field	Details		
	Properties		
	Create, Filter, Group, Nillable, Sort, Update		
	<b>Description</b> The record that specifies the inverse relationship between the roles. This field is a relationship field.		
	Relationship Name RelatedInverseRecord		
	Relationship Type Lookup		
	Refers To PartyRoleRelation		
RelatedRoleName	<b>Type</b> string		
	Properties Create, Filter, Group, Sort, Update		
	<b>Description</b> The role that's related to another role in the relationship.		
RelationshipObjectName	<b>Type</b> picklist		
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update		
	<b>Description</b> The object that's associated with the relationship.		
	Possible values are:		
	• Account_Account_Relationship—Account Account Relationship		
	<ul> <li>Contact_Contact_Relationship—Contact Contact Relationship</li> </ul>		
	The default value is Account_Account_Relationship.		
RoleName	<b>Type</b> string		
	Properties Create, Filter, Group, Sort, Update		
	<b>Description</b> The name of the role in the relationship.		
ShouldCreaInversRoleAuto	<b>Type</b> boolean		

Field	Details			
	Properties			
	Create, Defaulted on create, Filter, Group, Sort			
	<b>Description</b> Indicates whether a role record should be created automatically for the relationship (true) or not (false).			
	The default value is false.			

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.

# PartyRoleRelationChangeEvent (API Version 63.0)

Change events are available for the object.

#### PartyRoleRelationFeed

Feed tracking is available for the object.

#### PartyRoleRelationHistory

History is available for the object.

## PartyRoleRelationOwnerSharingRule

Sharing rules are available for the object.

#### PartyRoleRelationShare

Sharing is available for the object.

# Group Membership and Households Business APIs

Use business APIs to define and manage party relationship groups of individuals or trusts.

# **Special Access Rules**

To create party relationship groups, users need the Group Membership permission set. To merge party relationship groups, users must clone the Group Membership permission set, and enable the Merge and Split Groups system permission in the cloned permission set.

### **REST Reference**

You can access the Group Membership and Households APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

### SEE ALSO:

Salesforce Help: Group Membership and Households

# **REST Reference**

You can access the Group Membership and Households 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

The Group Membership and Households APIs have these resources.

## **Request Bodies**

The Group Membership and Households APIs have these request bodies.

## **Response Bodies**

The Group Membership and Households APIs have these response bodies.

# Resources

The Group Membership and Households APIs have these resources.

## Group Definitions (POST)

Define a party relationship group of individuals or trusts to deliver support services or to manage shared processes, such as cases and benefits.

#### Group Definitions Merge (POST)

Merge the details, members, member relationships, and relationships of a party relationship group.

#### Group Fields (GET)

Retrieve details from two party relationship groups.

# Group Related Records (GET)

Get the related records of a party relationship group.

# **Group Definitions (POST)**

Define a party relationship group of individuals or trusts to deliver support services or to manage shared processes, such as cases and benefits.

#### Resource

/connect/group/group-definitions

#### Resource example

#### **Available version**

58.0

## **Requires Chatter**

No

#### **HTTP** methods

POST

# **Request body for POST**

```
"accountDetail":{
   "name": "prg5",
   "ownerId":"005xx000001X7tNAAS",
   "billingAddress":{
      "street":"",
      "city":"Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode": "90042"
   },
   "shippingAddress":{
      "street":"",
      "city": "Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode": "90042"
   "phone": "0123456789"
},
"groupDetail":{
   "name": "prg5",
   "category": "Staying under the same roof",
   "type": "Household",
   "groupSize":"2",
   "groupIncome": "20000",
   "primaryAddress":{
      "street":"",
      "city": "Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode": "90042"
   }
},
"member":{
   "records":[
      {
         "contactId": "003xx000004WhHQAA0",
         "roles": "Decision Maker",
         "relations":[
            {
                "roleRelationId": "0zlxx000000001AAA",
                "relatedContactId":"003xx000004WhJ2AAK",
                "startDate":"2023-06-14T00:00:00.000Z"
            }
         ]
      }
   ]
},
"externalMember":{
  "records":[
```

```
"contactId": "003xx000004WhJ2AAK",
         "roles": "Decision Maker"
   ]
},
"relatedGroup":{
   "relations":[
      {
         "type":"Direct",
         "roleRelationId": "0zlxx00000001dAAA",
         "relatedAccountId":"001xx000003GYodAAG"
   ]
},
"relatedAccount":{
   "relations":[
   ]
}
```

Name	Туре	Description	Required or Optional	Available Version
account Detail	Map <string, Object&gt;</string, 	Account details associated with the party relationship group.	Required	58.0
external Member	Member Record Input[]	External member details of the party relationship group.	Optional	58.0
groupDetail	Map <string, Object&gt;</string, 	Party relationship group details, such as group size, group income, address, and associated custom fields.	Required	58.0
member	Member Record Input[]	Member details of the party relationship group being created.	Required	58.0
related Account	Account Relation Input[]	Data of the account that's related to the party relationship group being created.	Optional	58.0
relatedGroup	Account Relation Input[]	Data of the group that's related to the party relationship group being created.	Optional	58.0

# Response body for POST

**Group Definition** 

# **Group Definitions Merge (POST)**

Merge the details, members, member relationships, and relationships of a party relationship group.

#### Resource

/connect/group/group-definitions/actions/merge

## Resource example

https://yourInstance.salesforce.com/services/data/v63.0/connect/group/group-definitions/actions/merge

#### **Available version**

58.0

#### **Requires Chatter**

No

#### **HTTP** methods

**POST** 

#### **Request body for POST**

```
"primaryAccountId":"001RM000005aGUcYAM",
"secondaryAccountId": "001RM000005YYfiYAG",
"accountDetail":{
   "customFields":{
      "Account_CF1__c":"123",
      "Account CF2 c":"342"
   },
   "name": "Jones-Marshal HH",
   "fax":"213762",
   "billingAddress":{
      "street":"",
      "city":"",
      "state":"",
      "country":"",
      "postalCode":""
   },
   "shippingAddress":{
      "street":"",
      "city":"",
      "state":"",
      "country":"",
      "postalCode":""
   },
   "annualRevenue":"1500",
   "numberOfEmployees":"35",
   "type": "Agriculture"
},
"groupDetail":{
   "customFields":{
      "CF2 c":"123"
   "name": "Jones-Marshal HH",
   "category": "Staying under the same roof",
   "status": "Active",
   "description": "Merged household from Jones and Marshal HH",
```

```
"type": "Household",
   "groupSize":"52",
   "groupIncome":"4132",
   "primaryAddress":{
      "street":"",
      "city":"",
      "state":"",
      "country":"",
      "postalCode":""
   "partyRelationGroupId":"0wKRM00000001n2AA"
},
"member":{
   "records":[
      {
         "acrId": "07kRM0000000p0fYAC",
         "contactId": "003RM00000895N9YAI",
         "isPrimaryMember":false,
         "isActive":true,
         "isPrimaryGroup":false,
         "roles": "Economic Decision Maker; Decision Maker",
         "direct":false,
         "customFields":{
            "CF1 c":"2023-02-20",
            "CF2 c":"CF2: Geoff"
         },
         "relations":[
         ]
      },
         "acrId": "07kRM000000KXvrYAG",
         "contactId": "003RM00000895NDYAY",
         "isPrimaryMember":true,
         "isActive":true,
         "isPrimaryGroup":false,
         "roles": "Decision Maker",
         "direct":false,
         "customFields":{
            "CF1 c":"2023-02-19",
            "CF2 c":"CF2: Howard"
         },
         "relations":[
         ]
      },
         "acrId": "07kRM000000KYHkYAO",
         "contactId": "003RM000008D6q0YAC",
         "isPrimaryMember":false,
         "isActive":true,
         "isPrimaryGroup":false,
         "roles": "Other; Influencer",
         "direct":false,
```

```
"customFields":{
            "CF1 c":"2023-03-08"
         "relations":[
            {
               "ccrId": "0zmRM000000002EYAQ",
               "roleRelationId": "0zlRM000000014YAA",
               "relatedContactId":"003RM00000895N9YAI",
               "isActive":false
            },
               "ccrId": "0zmRM000000002NYAO",
               "roleRelationId": "0zlRM0000004CAaYAM",
               "relatedContactId": "003RM00000895NFYAY",
               "isActive":true
         ]
   1
},
"externalMember":{
   "records":[
      {
         "acrId": "07kRM000000KYHpYAO",
         "contactId": "003RM00000895NFYAY",
         "isPrimaryMember":false,
         "isActive":true,
         "isPrimaryGroup":false,
         "roles": "Technical Buyer",
         "direct":false,
         "relations":[
         1
      },
         "acrId": "07kRM000000pPdYAK",
         "contactId": "003RM0000089pihYAA",
         "isPrimaryMember":false,
         "isActive":true,
         "isPrimaryGroup":false,
         "roles": "Influencer",
         "direct":false,
         "relations":[
         ]
   1
"relatedGroup":{
   "relations":[
         "aarId": "0zoRM0000004CBKYA2",
         "roleRelationId": "0zlRM00000001JYAQ",
         "accountId": "001RM000005aVTBYA2",
```

```
"relatedAccountId":"001RM000005aGUcYAM",
   "isActive":true,
   "hierarchyType": "Peer",
   "customFields":{
      "CF3 c":false
},
   "aarId": "0zoRM00000003KYAQ",
   "roleRelationId": "0zlRM0000004C9mYAE",
   "accountId": "001RM000005YNUAYA4",
   "relatedAccountId": "001RM000005aGUcYAM",
   "startDate": "2023-03-05T00:00:00.000Z",
   "endDate": "2023-03-31T00:00:00.000Z",
   "isActive":true,
   "hierarchyType": "Parent",
   "customFields":{
      "CF3 c":false
},
   "aarId": "0zoRM00000003PYAQ",
   "roleRelationId": "0z1RM0000004C9mYAE",
   "accountId": "001RM000005YNUTYA4",
   "relatedAccountId": "001RM000005aGUcYAM",
   "startDate": "2023-03-05T00:00:00.000Z",
   "endDate": "2023-03-31T00:00:00.000Z",
   "isActive":true,
   "hierarchyType": "Parent",
   "customFields":{
      "CF3 c":false
},
   "aarId": "0zoRM0000004CBAYA2",
   "roleRelationId": "0zlRM00000001JYAQ",
   "accountId": "001RM000005iEBkYAM",
   "relatedAccountId": "001RM000005aGUcYAM",
   "isActive":true,
   "hierarchyType":"Peer",
   "customFields":{
      "CF3 c":false
},
   "aarId": "0zoRM00000003GYAQ",
   "roleRelationId": "0z1RM0000004C9mYAE",
   "accountId": "001RM000005YNUOYA4",
   "relatedAccountId": "001RM000005aGUcYAM",
   "startDate": "2023-03-05T00:00:00.000Z",
   "endDate": "2023-03-31T00:00:00.000Z",
   "isActive":true,
   "hierarchyType": "Parent",
   "customFields":{
```

```
"CF3 c":false
         }
      },
         "aarId": "0zoRM0000004CDPYA2",
         "roleRelationId": "0z1RM0000004C9mYAE",
         "accountId": "001RM000005aVWKYA2",
         "relatedAccountId": "001RM000005aGUcYAM",
         "startDate": "2023-03-05T00:00:00.000Z",
         "endDate":"2023-03-31T00:00:00.000Z",
         "isActive":true,
         "hierarchyType": "Parent",
         "customFields":{
            "CF3 c":false
      },
         "aarId": "0zoRM0000004CBFYA2",
         "roleRelationId": "0zlRM00000001JYAQ",
         "accountId": "001RM000005aVSIYA2",
         "relatedAccountId": "001RM000005aGUcYAM",
         "startDate": "2023-03-07T00:00:00.000Z",
         "endDate": "2023-04-08T00:00:00.000Z",
         "isActive":true,
         "hierarchyType": "Peer",
         "customFields":{
            "CF3 c":false
      }
   1
},
"relatedAccount":{
   "relations":[
         "aarId": "0zoRM0000004CAuYAM",
         "roleRelationId":"0zlRM0000004C9mYAE",
         "accountId": "001RM000005aGUcYAM",
         "relatedAccountId": "001RM000005ZLa5YAG",
         "isActive":true,
         "hierarchyType":"Peer",
         "customFields":{
            "CF3__c":false,
            "CF4 c":"A;C"
      },
         "aarId": "0zoRM0000004CB4YAM",
         "roleRelationId": "0zlRM00000001JYAQ",
         "accountId": "001RM000005aGUcYAM",
         "relatedAccountId": "001RM000005aGUNYA2",
         "isActive": false,
         "hierarchyType": "Peer",
         "customFields":{
            "CF3 c":false,
```

```
"CF4__c":"A;D"
         }
      },
         "aarId":"0zoRM000000004mYAA",
         "roleRelationId": "0zlRM00000001TYAQ",
         "accountId": "001RM000005aGUcYAM",
         "relatedAccountId":"001RM000005YXsUYAW",
         "isActive":true,
         "hierarchyType":"Peer",
         "customFields":{
            "CF3__c":true,
            "CF4 c":"A;C"
      }
   ]
},
"tasks":[
   "a03RM0000001Npi",
   "a03RM000001Npn"
]
```

Name	Туре	Description	Required or Optional	Available Version
account Detail	Account Input	Details of the merged account.	Required	58.0
external Member	Member Record Input	Details of the external members of a party relationship group.	Optional	58.0
groupDetail	Group Input	Details of the party relationship group, such as category, address, group size, group income, and custom fields.	Required	58.0
member	Member Record Input	Details of the party relationship group members.	Required	58.0
primary AccountId	String	ID of the primary account.	Required	58.0
related Account	Account Relation Input	Details of the related account.	Optional	58.0
relatedGroup	Account Relation Input	Details of the party relationship group.	Optional	58.0
secondary AccountId	String	ID of the secondary account.	Required	58.0
tasks	String[]	List of the records to create tasks for. For example, a task to assign benefits from	Optional	58.0

Name	Туре	Description	Required or Optional	Available Version
		the source party relationship group to the destination party relationship group.		

## **Response body for POST**

**Group Definition** 

# Group Fields (GET)

Retrieve details from two party relationship groups.

#### Resource

/connect/group/group-fields

## Resource example

https://yourInstance.salesforce.com/services/data/v63.0/correct/group/group-fields?groupIds=<0wkRM00000001r2A>,<0wkRM00000001r2A>,

## **Available version**

58.0

## **Requires Chatter**

No

# **HTTP** methods

GET

## **Request parameters for GET**

Parameter Name	Туре	Description	Required or Optional	Available Version
groupIds	String[]	Comma-separated list of the group IDs to merge the party relationship group details.		58.0

# **Response body for GET**

**Group Fields** 

# **Group Related Records (GET)**

Get the related records of a party relationship group.

#### Resource

/connect/group/accounts/\${accountId}/related-records

# Resource example

 $\verb|https://yourInstance.salesforce.com/services/data/v&3.0/connect/group/accounts/$\{001RM000005aVSIYA2\}/related-records|| the substitution of the$ 

# **Available version**

58.0

## **Requires Chatter**

No

#### **HTTP** methods

**GET** 

# **Response body for GET**

**Group Related Entity** 

# **Request Bodies**

The Group Membership and Households APIs have these request bodies.

### Address Input

Input representation of an account address or a party relationship group address.

#### **Account Input**

Input representation of an account.

#### **Account Relation Input**

Input representation of an account relationship.

## **Group Definition Input**

Input representation of a party relationship group definition.

## **Group Input**

Input representation of a party relationship group.

# Group Merge Input

Input representation of a merge party relationship group request.

#### Member Record Input

Input representation of the member records of a party relationship group.

#### Relationships Input

Input representation of the relationship among members of a party relationship group.

# Address Input

Input representation of an account address or a party relationship group address.

```
"billingAddress":{
    "street":"",
    "city":"Los Angeles",
    "state":"California",
    "country":"USA",
    "postalCode":"94263"
},
"shippingAddress":{
    "street":"",
    "city":"Los Angeles",
    "state":"California",
    "country":"USA",
```

```
"postalCode":"94263"
},
```

Name	Туре	Description	Required or Optional	Available Version
city	String	City of the account or the party relationship group.	Optional	58.0
country	String	Country of the account or the party relationship group.	Optional	58.0
postalCode	String	Postal code of the account or the party relationship group.	Optional	58.0
state	String	State of the account or the party relationship group.	Optional	58.0
street	String	Street of the account or the party relationship group.	Optional	58.0

# **Account Input**

Input representation of an account.

```
"accountDetail":{
   "name":"prg5",
   "ownerId": "005xx000001X7tNAAS",
   "billingAddress":{
      "street":"",
      "city":"Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode":"90042"
   },
   "shippingAddress":{
      "street":"",
      "city":"Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode":"11111"
   },
   "phone": "0123456789"
}
```

Name	Туре	Description	Required or Optional	Available Version
accountId	String	ID of the account.	Required	58.0
accountNumber	String	Account number assigned to the account.	Optional	58.0
accountSite	String	Location of the account.	Optional	58.0
accountSource	String	Source of the account record.	Optional	58.0
annualRevenue	String	Estimated annual revenue of the account.	Optional	58.0
billingAddress	Address Input	Billing address of the account.	Optional	58.0
customFields	Map <string, Object&gt;</string, 	Custom fields associated with the account.	Optional	58.0
description	String	Text description of the account.	Optional	58.0
fax	String	Fax number of the account.	Optional	58.0
industry	String	Industry associated with the account.	Optional	58.0
jigsaw	String	References the ID of a company in Data.com.	Optional	58.0
name	String	Name of the account.	Required	58.0
numberOf Employees	String	Number of employees working at the company represented by the account.	Optional	58.0
ownerId	String	ID of the user who currently owns the account.	Optional	58.0
ownership	String	Ownership type for the account.	Optional	58.0
parentId	String	ID of the parent object, if any.	Optional	58.0
phone	String	Phone number of the account.	Optional	58.0
rating	String	Account's prospect rating.	Optional	58.0
recordType	String	ID of the record type assigned to the object.	Optional	58.0
shipping Address	Address Input	Shipping address of the account.	Optional	58.0
sic	String	Standard Industrial Classification (SIC) code of the company's main business categorization.	Optional	58.0
sicDesc	String	Brief description of the org's line of business, based on its SIC code.	Optional	58.0
tickerSymbol	String	Stock market symbol of the account.	Optional	58.0

Name	Туре	Description	Required or Optional	Available Version
tier	String	Tier type of the account.	Optional	58.0
type	String	Type of account.	Optional	58.0
website	String	Website of the account.	Optional	58.0

## **Account Relation Input**

Input representation of an account relationship.

#### JSON example

```
"relations":[
      "type": "Direct",
      "roleRelationId": "0zlxx00000001dAAA",
      "relatedAccountId": "001xx000003GYodAAG",
      "startDate":"2023-06-15T00:00:00.000Z",
      "endDate":"2023-12-15T00:00:00.000Z",
      "relatedInverseRecordId":"",
      "isActive":true,
      "customFields":{
         "field1": "field1Value",
         "field2": "field1Value"
      }
   },
      "type":"Indirect",
      "roleRelationId": "0zlxx00000001dGAC",
      "accountId": "001xx000003GYodACD",
      "startDate": "2023-02-15T00:00:00.000Z",
      "endDate":"2023-09-15T00:00:00.000Z",
      "isActive":true,
      "customFields":{
         "field1": "field1Value",
         "field2": "field1Value"
]
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
aarId	String	Record ID of the AccountRelationship object.	Optional	58.0

Name	Туре	Description	Required or Optional	Available Version
accountId	String	Primary account involved in the relationship. If the account relationship type is direct, then Account ID is required.	Optional	58.0
customFields	Map <string, Object&gt;</string, 	Custom fields associated with the AccountRelationship object.	Optional	58.0
endDate	String	Date when the account relationship ends.	Optional	58.0
hierarchyType	String	Hierarchy among the accounts that are related. For example, an account is related to another account as a parent, a peer, or a child.	Optional	58.0
isActive	Boolean	Indicates whether the account is actively involved with the related account (true) or not (false).	Optional	58.0
related AccountId	String	Record ID of the related account. If the account relationship type is direct, then the related account ID is required.	Optional	58.0
related Inverse RecordId	String	Record ID of the related inverse relationship record.	Optional	58.0
roleRelation Id	String	Record ID of the party role relationship.	Required	58.0
startDate	String	Date when the account relationship starts.	Optional	58.0
type	String	Type of account relationship, such as a direct or indirect relationship. The default value is false. If the related InverseRecordId property is specified, then the relationship type is indirect.	Optional	58.0

# **Group Definition Input**

Input representation of a party relationship group definition.

```
"accountDetail":{
    "name":"prg5",
    "ownerId":"005xx000001X7tNAAS",
    "billingAddress":{
        "street":"",
        "city":"Los Angeles",
```

```
"state": "California",
      "country": "USA",
      "postalCode": "90042"
   },
   "shippingAddress":{
      "street":"",
      "city": "Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode": "90042"
   "phone": "0123456789"
"groupDetail":{
   "name": "prg5",
   "category": "Staying under the same roof",
   "type": "Household",
   "groupSize":"2",
   "groupIncome": "20000",
   "primaryAddress":{
      "street":"",
      "city":"Los Angeles",
      "state": "California",
      "country": "USA",
      "postalCode": "90042"
   }
},
"member":{
   "records":[
      {
         "contactId": "003xx000004WhHQAA0",
         "roles": "Decision Maker",
         "relations":[
                "roleRelationId": "0zlxx000000001AAA",
                "relatedContactId":"003xx000004WhJ2AAK",
                "startDate":"2023-06-14T00:00:00.000Z"
         ]
      }
   ]
},
"externalMember":{
   "records":[
      {
         "contactId": "003xx000004WhJ2AAK",
         "roles": "Decision Maker"
   ]
"relatedGroup":{
   "relations":[
      {
         "type": "Direct",
```

Name	Туре	Description	Required or Optional	Available Version
accountDetail	Map <string, Object&gt;</string, 	Account details associated with the party relationship group.	Required	58.0
external Member	Member Record Input[]	External member details of the party relationship group.	Optional	58.0
groupDetail	Map <string, Object&gt;</string, 	Party relationship group details, such as group size, group income, address, and associated custom fields.	Required	58.0
member	Member Record Input[]	Member details of the party relationship group being created.	Required	58.0
related Account	Account Relation Input[]	Data of the account that's related to the party relationship group being created.	Optional	58.0
relatedGroup	Account Relation Input[]	Data of the group that's related to the party relationship group being created.	Optional	58.0

## **Group Input**

Input representation of a party relationship group.

```
"groupDetail":{
    "name":"prg5",
    "category":"Staying under the same roof",
    "type":"Household",
    "groupSize":"2",
    "groupIncome":"20000",
    "primaryAddress":{
        "street":"",
        "city":"Los Angeles",
        "state":"California",
        "country":"USA",
        "postalCode":"90042"
```

}

## **Properties**

Name	Туре	Description	Required or Optional	Available Version
category	String	Category of the party relationship group.	Optional	58.0
customFields	Map <string, Object&gt;</string, 	Custom fields associated with the party relationship group.	Optional	58.0
description	String	Description of the party relationship group.	Optional	58.0
endDate	String	End date associated with the party relationship group.	Optional	58.0
groupIncome	String	Total income of the party relationship group.	Optional	58.0
groupSize	String	Number of active members associated with the party relationship group.	Optional	58.0
name	String	Name of the party relationship group.	Required	58.0
partyRelation GroupId	String	Record ID of the party relationship group. Record ID is optional when creating a group and required when merging groups.	Required	58.0
primary Address	Address Input	Primary address of the party relationship group.	Required	58.0
startDate	String	Start date associated with the party relationship group.	Optional	58.0
status	String	Status of the party relationship group. Valid values are:  • Active • Inactive	Optional	58.0
subtype	String	Subclassification of the party relationship group type.	Optional	58.0
type	String	Type of the party relationship group. Valid values are: Group Household	Required	58.0

# Group Merge Input

Input representation of a merge party relationship group request.

```
"primaryAccountId": "001RM000005aGUcYAM",
"secondaryAccountId":"001RM000005YYfiYAG",
"accountDetail":{
   "customFields":{
      "Account CF1 c":"123",
      "Account CF2 c":"342"
   "name": "Jones-Marshal HH",
   "fax":"213762",
   "billingAddress":{
      "street":"",
      "city":"",
      "state":"",
      "country":"",
      "postalCode":""
   },
   "shippingAddress":{
      "street":"",
      "city":"",
      "state":"",
      "country":"",
      "postalCode":""
   "annualRevenue":"1500",
   "numberOfEmployees":"35",
   "type": "Agriculture"
},
"groupDetail":{
   "customFields":{
     "CF2 c":"123"
   },
   "name":"Jones-Marshal HH",
   "category": "Staying under the same roof",
   "status": "Active",
   "description": "Merged household from Jones and Marshal HH",
   "type": "Household",
   "groupSize":"52",
   "groupIncome":"4132",
   "primaryAddress":{
      "street":"",
      "city":"",
      "state":"",
      "country":"",
      "postalCode":""
   "partyRelationGroupId":"0wKRM00000001n2AA"
},
"member":{
   "records":[
         "acrId": "07kRM000000p0fYAC",
```

```
"contactId": "003RM00000895N9YAI",
   "isPrimaryMember":false,
   "isActive":true,
   "isPrimaryGroup":false,
   "roles": "Economic Decision Maker; Decision Maker",
   "direct":false,
   "customFields":{
      "CF1 c":"2023-02-20",
      "CF2 c":"CF2: Geoff"
   },
   "relations":[
},
   "acrId": "07kRM000000KXvrYAG",
   "contactId": "003RM00000895NDYAY",
   "isPrimaryMember":true,
   "isActive":true,
   "isPrimaryGroup":false,
   "roles": "Decision Maker",
   "direct":false,
   "customFields":{
      "CF1 c":"2023-02-19",
      "CF2 c":"CF2: Howard"
   },
   "relations":[
   ]
},
   "acrId": "07kRM000000KYHkYAO",
   "contactId": "003RM000008D6q0YAC",
   "isPrimaryMember":false,
   "isActive":true,
   "isPrimaryGroup":false,
   "roles": "Other; Influencer",
   "direct":false,
   "customFields":{
      "CF1 c":"2023-03-08"
   },
   "relations":[
         "ccrId": "0zmRM000000002EYAQ",
         "roleRelationId": "0zlRM000000014YAA",
         "relatedContactId":"003RM00000895N9YAI",
         "isActive": false
      },
         "ccrId": "0zmRM00000002NYAQ",
         "roleRelationId": "0zlRM0000004CAaYAM",
         "relatedContactId":"003RM00000895NFYAY",
         "isActive":true
```

```
]
},
"externalMember":{
   "records":[
      {
         "acrId": "07kRM000000KYHpYAO",
         "contactId": "003RM00000895NFYAY",
         "isPrimaryMember":false,
         "isActive":true,
         "isPrimaryGroup":false,
         "roles": "Technical Buyer",
         "direct":false,
         "relations":[
         1
      },
         "acrId": "07kRM000000pPdYAK",
         "contactId": "003RM0000089pihYAA",
         "isPrimaryMember":false,
         "isActive":true,
         "isPrimaryGroup":false,
         "roles": "Influencer",
         "direct":false,
         "relations":[
         ]
      }
   ]
"relatedGroup":{
   "relations":[
         "aarId": "0zoRM0000004CBKYA2",
         "roleRelationId": "0zlRM00000001JYAQ",
         "accountId": "001RM000005aVTBYA2",
         "relatedAccountId": "001RM000005aGUcYAM",
         "isActive":true,
         "hierarchyType":"Peer",
         "customFields":{
            "CF3__c":false
      },
         "aarId": "0zoRM00000003KYAO",
         "roleRelationId": "0zlRM0000004C9mYAE",
         "accountId": "001RM000005YNUAYA4",
         "relatedAccountId":"001RM000005aGUcYAM",
         "startDate": "2023-03-05T00:00:00.000Z",
         "endDate":"2023-03-31T00:00:00.000Z",
         "isActive":true,
         "hierarchyType": "Parent",
```

```
"customFields":{
      "CF3 c":false
},
{
   "aarId": "0zoRM00000003PYAQ",
   "roleRelationId": "0z1RM0000004C9mYAE",
   "accountId": "001RM000005YNUTYA4",
   "relatedAccountId": "001RM000005aGUcYAM",
   "startDate": "2023-03-05T00:00:00.000Z",
   "endDate": "2023-03-31T00:00:00.000Z",
   "isActive":true,
   "hierarchyType": "Parent",
   "customFields":{
      "CF3 c":false
},
   "aarId": "0zoRM0000004CBAYA2",
   "roleRelationId": "0zlRM00000001JYAQ",
   "accountId": "001RM000005iEBkYAM",
   "relatedAccountId":"001RM000005aGUcYAM",
   "isActive":true,
   "hierarchyType": "Peer",
   "customFields":{
      "CF3 c":false
},
   "aarId": "0zoRM00000003GYAO",
   "roleRelationId": "0zlRM0000004C9mYAE",
   "accountId": "001RM000005YNUOYA4",
   "relatedAccountId":"001RM000005aGUcYAM",
   "startDate": "2023-03-05T00:00:00.000Z",
   "endDate": "2023-03-31T00:00:00.000Z",
   "isActive":true,
   "hierarchyType": "Parent",
   "customFields":{
      "CF3 c":false
},
   "aarId": "0zoRM0000004CDPYA2",
   "roleRelationId": "0zlRM0000004C9mYAE",
   "accountId": "001RM000005aVWKYA2",
   "relatedAccountId": "001RM000005aGUcYAM",
   "startDate":"2023-03-05T00:00:00.000Z",
   "endDate": "2023-03-31T00:00:00.000Z",
   "isActive":true,
   "hierarchyType": "Parent",
   "customFields":{
      "CF3 c":false
},
```

```
"aarId": "0zoRM0000004CBFYA2",
         "roleRelationId": "0zlRM00000001JYAQ",
         "accountId": "001RM000005aVSIYA2",
         "relatedAccountId": "001RM000005aGUcYAM",
         "startDate": "2023-03-07T00:00:00.000Z",
         "endDate": "2023-04-08T00:00:00.000Z",
         "isActive":true,
         "hierarchyType": "Peer",
         "customFields":{
            "CF3 c":false
   ]
},
"relatedAccount":{
   "relations":[
         "aarId": "0zoRM0000004CAuYAM",
         "roleRelationId": "0zlRM0000004C9mYAE",
         "accountId": "001RM000005aGUcYAM",
         "relatedAccountId": "001RM000005ZLa5YAG",
         "isActive":true,
         "hierarchyType":"Peer",
         "customFields":{
            "CF3 c":false,
            "CF4 c":"A;C"
      },
         "aarId": "0zoRM0000004CB4YAM",
         "roleRelationId": "0zlRM00000001JYAQ",
         "accountId": "001RM000005aGUcYAM",
         "relatedAccountId": "001RM000005aGUNYA2",
         "isActive": false,
         "hierarchyType":"Peer",
         "customFields":{
            "CF3__c":false,
            "CF4 c": "A; D"
      },
         "aarId": "0zoRM00000004mYAA",
         "roleRelationId": "0zlRM00000001TYAQ",
         "accountId": "001RM000005aGUcYAM",
         "relatedAccountId": "001RM000005YXsUYAW",
         "isActive":true,
         "hierarchyType":"Peer",
         "customFields":{
            "CF3 c":true,
            "CF4__c":"A;C"
         }
      }
   1
```

```
},
"tasks":[
    "a03RM0000001Npi",
    "a03RM0000001Npn"
]
```

Name	Туре	Description	Required or Optional	Available Version
accountDetail	Account Input	Details of the merged account.	Required	58.0
external Member	Member Record Input	Details of the external members of a party relationship group.	Optional	58.0
groupDetail	Group Input	Details of the party relationship group, such as category, address, group size, group income, and custom fields.	Required	58.0
member	Member Record Input	Details of the party relationship group members.	Required	58.0
primary AccountId	String	ID of the primary account.	Required	58.0
related Account	Account Relation Input	Details of the related account.	Optional	58.0
relatedGroup	Account Relation Input	Details of the party relationship group.	Optional	58.0
secondary AccountId	String	ID of the secondary account.	Required	58.0
tasks	String[]	List of the records to create tasks for. For example, a task to assign benefits from the source party relationship group to the destination party relationship group.	Optional	58.0

## Member Record Input

Input representation of the member records of a party relationship group.

Name	Туре	Description	Required or Optional	Available Version
acrId	String	ID of the Account Contact relationship.	The acrId property is required if an account ID is specified when defining a party relationship group.	58.0
contactId	String	ID of the Contact.	Required	58.0
customFields	Map <string, Object&gt;</string, 	Custom fields associated with a party relationship group member.	Optional	58.0
dataRollupCategory	String	Category of the data roll-up summary field.	Optional	58.0
direct	Boolean	Indicates whether the member relationship is a direct relationship (true) or not (false).	Optional	58.0
endDate	Date	Date when the member relationship ends.	Optional	58.0
relations	Relationships Input	Details of the member record relationship.	Optional	58.0
roles	String	Role of the member in the party relationship group. For example, a decision maker role or a caregiver role.	Required	58.0
startDate	Date	Date when the member relationship starts.	Optional	58.0

## Relationships Input

Input representation of the relationship among members of a party relationship group.

Name	Туре	Description	Required or Optional	Available Version
ccrId	String	Record ID of the ContactContactRelationship object.	Optional	58.0
customFields	Map <string, Object&gt;</string, 	Custom fields associated with the ContactRelationship object.	Optional	58.0
endDate	String	Date when the contact relationship ends.	Optional	58.0
hierarchyType	String	Hierarchy among the contacts that are related.	Optional	58.0
isActive	Boolean	Indicates whether the relationship is active (true) or not (false).	Optional	58.0
relatedContactId	String	Record ID of the RelatedContact object.	Required	58.0
relatedInversePecordId	String	Record ID of the related inverse record.	Optional	58.0
roleRelationId	String	Record ID of the PartyRoleRelation object.	Required	58.0
startDate	String	Date when the contact relationship starts.	Optional	58.0

# **Response Bodies**

The Group Membership and Households APIs have these response bodies.

### **Group Definition**

Output representation of a party relationship group definition.

#### **Group Fields**

Output representation of the fields of the party relationship groups to be merged.

#### **Group Related Entity**

Output representation of the request to fetch the related records of a party relationship group.

## **Group Definition**

Output representation of a party relationship group definition.

```
{
    "accountId": "001RM000005mkcuYAA",
    "code": "200",
```

```
"isSuccess": true,
"message": "",
"partyRelationshipId": "0wKRM0000000BT2AY"
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
accountId	String	Record ID of the Account object.	Small, 58.0	58.0
code	String	Error code with details of the error.	Small, 58.0	58.0
isSuccess	Boolean	Indicates whether the create request is successful (true) or not (false).	Small, 58.0	58.0
message	String	Message of the API request.	Small, 58.0	58.0
partyRelationshipIo	d String	Record ID of the PartyRelationshipGroup object.	Small, 58.0	58.0

## **Group Fields**

Output representation of the fields of the party relationship groups to be merged.

```
"accountFields":[
   "field1",
   "field2",
   "field3",
   "customFields":[
      "customField1",
      "customField2"
   1
],
"prgFields":[
   "field1",
   "field2",
   "field3",
   "customFields":[
      "customField1",
      "customField2"
   ]
],
"accId1":{
   "Account":{
      "name": "Account A",
      "shippingAddress":"",
      "customFields":{
         "customField1":"sample_customfield1",
         "customField2": "sample_customfield2"
   },
   "PRG":{
```

```
"name": "Smith Household",
         "category": "Staying under the same roof",
         "customFields":{
            "customField1": "sample customfield3",
            "customField2":"sample customfield4"
      }
   },
   "accId2":{
      "Account":{
         "name": "Account B",
         "shippingAddress":"",
         "customFields":{
            "customField1": "sample customfield5",
            "customField2":"sample customfield6"
      },
      "PRG":{
         "name": "Marshall Household",
         "category": "Staying under the same roof",
         "customFields":{
            "customField1": "sample customfield7",
            "customField2": "sample customfield8"
      }
  }
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
accId1	Map <string, Object&gt;</string, 	ID of the primary party relationship group.	Small, 58.0	58.0
accId2	Map <string, Object&gt;</string, 	ID of the secondary party relationship group.	Small, 58.0	58.0
accountFields	Object[]	List of fields associated with the account.	Small, 58.0	58.0
prgFields	Object[]	List of fields associated with the party relationship group.	Small, 58.0	58.0

## **Group Related Entity**

Output representation of the request to fetch the related records of a party relationship group.

```
"CaseParticipant":[
      "1caxx00000000BL"
   "ContentDocumentLink":[
      "06Axx0000004C93"
   "Case":[
      "500xx000000bod7",
      "500xx000000boej"
   ],
   "Contact":[
      "003xx000004Wi5Q"
   "PublicComplaint":[
     "0fhxx000000006T"
   ],
   "WorkOrder":[
      "0W0xx000000001"
   ],
   "CarePlan":[
      "1spxx00000003F"
   "Opportunity":[
      "006xx000001a332",
      "006xx000001a34e",
      "006xx000001a36G"
   ],
   "Lead":[
      "00Qxx000002TRb0"
   "Entity1 c":[
      "a01xx000003GaSF"
   ],
   "Asset":[
     "02ixx0000004HHi"
   "Allegation__c":[
      "a00xx000000bobV"
   ],
   "Contract":[
      "800xx000000bohx"
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
relatedEntities	Map <string, String[]&gt;</string, 	Map of the related objects and their record IDs. For example, case participants, tasks, cases, contacts, and public complaints.	Small, 58.0	58.0

# **CHAPTER 9** Record Rollup Definitions

## In this chapter ...

- Record Rollup Definitions Standard Objects
- Record Rollup Definitions Business APIs
- Record Rollup Definitions Metadata API Types
- Record Rollup Definitions Tooling API Objects

Use Record Rollup Definitions to streamline the aggregation of records from various objects or groups. They also give a consolidated view of data so that your business executives can make accurate decisions swiftly and effortlessly.

#### SEE ALSO:

Salesforce Help: Record Rollup Definitions
Salesforce Help: Record Rollup Definitions Basics

# **Record Rollup Definitions Standard Objects**

Use standard objects to manage record rollup definitions and data aggregation among records.

#### RecordAggregationResult

Represents a data aggregation from one record to another record based on the record aggregation definition for the corresponding objects. This object is available in API version 59.0 and later.

# RecordAggregationResult

Represents a data aggregation from one record to another record based on the record aggregation definition for the corresponding objects. This object is available in API version 59.0 and later.

# Supported Calls

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

# **Special Access Rules**

This object is available if your org has the Record Aggregation permission set license, and you have the Record Aggregation Access permission.

## **Fields**

Field	Details
AggregateFromRecordId	<b>Type</b> reference
	Properties Create, Filter, Group, Sort, Update
	<b>Description</b> The record from which data is aggregated.
	This field is a polymorphic relationship field.
	Relationship Name AggregateFromRecord
	Relationship Type Lookup
AggregateToRecordId	Туре
	reference
	Properties
	Create, Filter, Group, Sort, Update

Record Rollup Definitions RecordAggregationResult

Field	Details
	Description
	The record to which data is aggregated.
	This field is a polymorphic relationship field.
	Relationship Name AggregateToRecord
	Relationship Type Lookup
LastReferencedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last accessed this record indirectly, for example, through a list view or related record.
LastViewedDate	<b>Type</b> dateTime
	<b>Properties</b> Filter, Nillable, Sort
	<b>Description</b> The timestamp when the current user last viewed this record or list view. If this value is null, and LastReferenceDate is not null, the user accessed this record or list view indirectly.
Name	Туре
	string
	Properties
	Autonumber, Defaulted on create, Filter, idLookup, Sort
	<b>Description</b> The name of the record aggregation result.
OwnerId	<b>Type</b> reference
	<b>Properties</b> Create, Defaulted on create, Filter, Group, Sort, Update
	<b>Description</b> The ID of the owner of this object.
	This field is a polymorphic relationship field.
	Relationship Name Owner

Field	Details
	Relationship Type Lookup
	Refers To
	Group, User
RecordAggregationDefinitionId	Type reference
	Properties
	Create, Filter, Group, Sort, Update
	<b>Description</b> The record aggregation definition for the data aggregation from the aggregate-from record to the aggregate-to record.
	This field is a relationship field.
	Relationship Name RecordAggregationDefinition
	Relationship Type Lookup
	Refers To RecordAggregationDefinition

# **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.

#### RecordAggregationResultChangeEvent (API Version 63.0)

Change events are available for the object.

#### Record Aggregation Result Owner Sharing Rule

Sharing rules are available for the object.

## Record Aggregation Result Share

Sharing is available for the object.

# Record Rollup Definitions Business APIs

Use the Record Rollup Definitions Business APIs to get a consolidated view of data for a specific record aggregation definition. You can sort data by name and arrange it in ascending or descending order.

## **Available Resources**

Resource	Description
/cmed/record-agregation/record/agregation/refinition(d) record-rollup-results on page 590 (POST)	Get rollup results for a specific record aggregation definition. Sort the data by name and arrange it in ascending or descending order.
/connect/record-aggregation/dpe-generation on page 589 (POST)	Generate a Data Processing Engine (DPE) definition for the record aggregation definitions that you have configured. Run the DPE definition to aggregate records.

#### **REST Reference**

You can access Record Rollup Definitions Business APIs by using the REST endpoint that follows similar conventions as Connect REST APIs.

## **REST Reference**

You can access Record Rollup Definitions Business APIs by using the REST endpoint that follows similar conventions as Connect REST APIs.

#### Resources

Learn more about the available resource of Record Rollup Definitions Business APIs.

#### Requests

Learn more about the available request body of Record Rollup Definitions Business APIs.

#### Responses

Learn more about the available response bodies of Record Rollup Definitions Business APIs.

#### SEE ALSO:

Connect REST API Developer Guide: Connect REST API Introduction

#### Resources

Learn more about the available resource of Record Rollup Definitions Business APIs.

#### Record Aggregation DPE Definition Generation (POST)

Generate a Data Processing Engine (DPE) definition for the record aggregation definitions that you have configured. Run the DPE definition to aggregate records.

#### Record Rollup Definitions (POST)

Get rollup results for a specific record aggregation definition. Sort the data by name and arrange it in ascending or descending order.

### Record Aggregation DPE Definition Generation (POST)

Generate a Data Processing Engine (DPE) definition for the record aggregation definitions that you have configured. Run the DPE definition to aggregate records.

Generate a DPE definition for a record aggregation definition or for all the record aggregation definitions that you have configured.

After you generate a DPE definition, if you configure a new record aggregation definition, generate a DPE definition for all your record aggregation definitions. If you generate a DPE definition for only the new record aggregation definition, the request overwrites the definition that you generated before and doesn't append to it.

The DPE definition is generated subject to the Data Processing Engine limits.

#### Resource

```
/connect/record-aggregation/dpe-generation
```

#### Resource example

 $\verb|https://yourInstance.salesforce.com| | services/data/v63.0/connect/record-aggregation/dpe-generation| | services/data/v63.0/connect/record-aggregation/dpe-generat$ 

#### **Available version**

59.0

#### **Requires Chatter**

No

#### **HTTP** methods

**POST** 

#### **Request body for POST**

#### JSON example

```
{
  "definitionId": "ALL"
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
definitionId	String	ID of a record aggregation definition component.	Required	59.0
		To generate a Data Processing Engine definition for all the active record aggregation definition components, specify ALL.		

#### **Response body for POST**

Data Processing Engine Definition List Output

SEE ALSO:

Salesforce Help: Data Processing Engine Limits

## **Record Rollup Definitions (POST)**

Get rollup results for a specific record aggregation definition. Sort the data by name and arrange it in ascending or descending order.

#### Resource

 $/{\tt connect/record-aggregation}/ \textbf{\textit{recordAggregationDefinitionId}}/{\tt record-rollup-results}$ 

The recordAggregationDefinitionId parameter is the ID of the record aggregation definition.

#### Resource example

https://**yauTinstance.**.salesforce.com/services/data/v63.0/correct/record-aggregation/**16,000001**/record-rollup-results?anchorFecordid=**10.5000001** 

#### **Available version**

61.0

#### **HTTP** methods

POST

#### **Query parameters for POST**

Parameter Name	Туре	Description	Required or Optional	Available Version
anchorRecordId	String	ID of the record to which the aggregated records are rolled up.	Required	61.0

#### **Request body for POST**

## JSON example

```
{
  "sortBy": "Name",
  "isSortOrderAscending": true
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
isSortOrder Ascending	Boolean	Indicates whether the sort order is ascending (true) or not (false). The default value is true.	Optional	61.0
sortBy	String	Criteria to sort the record aggregation results. The default value is CreatedDate.	Optional	61.0

#### **Response body for POST**

**Record Rollup Results** 

# Requests

Learn more about the available request body of Record Rollup Definitions Business APIs.

#### Record Aggregation Definition Input

Input representation of a Record Aggregation Data Processing Engine definition generation request.

#### Record Rollup Result Input

Input representation to sort and fetch the record rollup results.

## **Record Aggregation Definition Input**

Input representation of a Record Aggregation Data Processing Engine definition generation request.

#### JSON example

```
{
   "definitionId": "ALL"
}
```

### **Properties**

Name	Туре	Description	Required or Optional	Available Version
definitionId	String	ID of a record aggregation definition component.	Required	59.0
		To generate a Data Processing Engine definition for all the active record aggregation definition components, specify ALL.		

## Record Rollup Result Input

Input representation to sort and fetch the record rollup results.

#### JSON example

```
"sortBy": "Name",
"isSortOrderAscending": true
}
```

#### **Properties**

Name	Туре	Description	Required or Optional	Available Version
isSortOrder Ascending	Boolean	Indicates whether the sort order is ascending (true) or not (false). The default value is true.	Optional	61.0
sortBy	String	Criteria to sort the record aggregation results. The default value is CreatedDate.	Optional	61.0

# Responses

Learn more about the available response bodies of Record Rollup Definitions Business APIs.

Refer to the HTTP response code to check whether the request was successful, as well as viewing the error messages for the failed requests.

#### Data Processing Engine Definition List Output

Output representation of a Record Aggregation Data Processing Engine definition generation request.

#### Record Rollup Result Column

Output representation of the consolidated view of the table column data.

#### Record Rollup Results

Output representation of the record rollup results.

#### Record Rollup Result Row

Output representation of the consolidated view of the table row data.

## **Data Processing Engine Definition List Output**

Output representation of a Record Aggregation Data Processing Engine definition generation request.

#### JSON example

```
"code": "200",
  "dpeIds": [
      "9N1SB00000006iL0AY"
],
    "isSuccess": true,
    "message": "DPE Generated Successfully"
}
```

Property Name	Туре	Description	Filter Group and Version	Available Version
code	String	Status code of the request.	Small, 59.0	59.0
dpeIds	String[]	List of Data Processing Engine definition IDs.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the Data Processing Engine definition is generated (true) or not (false).	Small, 59.0	59.0
message	String	Indicates whether the generation of the Data Processing Engine definition succeeded or failed.	Small, 59.0	59.0

## Record Rollup Result Column

Output representation of the consolidated view of the table column data.

## **JSON Example**

Property Name	Туре	Description	Filter Group and Version	Available Version
displayFormat Type	String	Data type of the field that represents the column. This data type corresponds to the type recognized by the Lightning data table.	Small, 61.0	61.0
fieldApiName	String	API name of the field that represents the column of the table.	Small, 61.0	61.0
fieldLabel	String	Name of the field that represents the column of the table.	Small, 61.0	61.0
isRedirection Enabled	Boolean	Indicates whether clicking the column label redirects to the relevant record details page (true) or not (false). The value is true if fieldApiName is Name or if displayFormatType is reference, which is a Lookup relation in Salesforce.	Small, 61.0	61.0
sequence	Integer	Sequence in which the column appears in the data table.	Small, 61.0	61.0
isSortable	Boolean	Indicates whether the column is sortable (true) or not (false).	Small, 61.0	61.0
isTypeName	Boolean	Indicates whether the field is of type Name (true) or not (false).	Small, 61.0	61.0
sortByField	String	Represents the field that's used to sort the table.	Small, 61.0	61.0

# **Record Rollup Results**

Output representation of the record rollup results.

```
"columns": [
    "fieldApiName": "Name",
    "displayFormatType": "text",
    "fieldLabel": "Name",
    "sequence": 0,
    "isRedirectionEnabled": true,
    "isSortable": true,
    "isTypeName": true,
    "sortByField": "Name"
  },
    "fieldApiName": "BranchUnit",
    "displayFormatType": "reference",
    "fieldLabel": "Branch Unit",
    "sequence": 4,
    "isRedirectionEnabled": true,
    "isSortable": true,
    "isTypeName": false,
    "sortByField": "BranchUnit.Name"
 }
],
"message": "Successful",
"rows": [
    "rowData": {
      "Status": "Active",
      "Type": "Savings",
      "Id": "0c7xx00000006TAAQ",
      "FinancialAccountNumber": "*******0001",
      "Name": "John Doe",
      "Case__c": {
       "Id": "Some ID",
        "CaseNumber": "000001"
      }
    }
  }
],
"statusCode": "200",
"totalResultCount": 1,
"definitionDisplayName": "Savings Financial Account"
```

Property Name	Туре	Description	Filter Group and Version	Available Version
columns	Record Rollup Result Column[]	List of fields that represent the columns of a table.	Small, 61.0	61.0
definition DisplayName	String	Name of the record aggregation definition.	Small, 61.0	61.0

Property Name	Туре	Description	Filter Group and Version	Available Version
message	String	Message for the HTTP response code.	Small, 61.0	61.0
rows	Record Rollup Result Row[]	List of aggregated records that represent the rows of a table.	Small, 61.0	61.0
statusCode	String	HTTP response code for the request.	Small, 61.0	61.0
totalResult Count	Integer	Total number of record aggregation results.	Small, 61.0	61.0

## Record Rollup Result Row

Output representation of the consolidated view of the table row data.

#### **JSON Example**

Property Name	Туре	Description	Filter Group and Version	Available Version
rowData	Map <string, Object&gt;</string, 	Map of key-value pairs, where key represents the field API name and value represents the field value.	Small, 61.0	61.0

# Record Rollup Definitions Metadata API Types

Metadata API enables you to access some types and feature settings that you can customize in the user interface.

#### RecordAggregationDefinition

Represents a data aggregation from one object to another object to which it is connected by other objects in the data model.

SEE ALSO:

Metadata API Developer Guide: Understanding Metadata API

# RecordAggregationDefinition

Represents a data aggregation from one object to another object to which it is connected by other objects in the data model.



**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

RecordAggregationDefinition components have the suffix .RecordAggregationDefinition and are stored in the RecordAggregationDefinitions folder.

#### Version

RecordAggregationDefinition components are available in API version 59.0 and later.

# **Special Access Rules**

To access the RecordAggregationDefinition metadata type, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

#### **Fields**

Field Name	Description
aggregateFromObject	Field Type string
	Description
	Required.
	API name of the object from which data is aggregated.
aggregateToObject	Field Type string
	Description
	Required.

Field Name	Description	
	API name of the object to which data is aggregated.	
aggregationType	<b>Field Type</b> RecordAggregationDefinitionAggregationType (enumeration of type string)	
	Description	
	Required.	
	Type of the data aggregation.	
	Valid value is:	
	• Record	
batchProcessingDefinition	Field Type string	
	<b>Description</b> Data Processing Engine definition that aggregates data from one record to another.	
description	Field Type string	
	<b>Description</b> Description for this record aggregation definition.	
displayName	Field Type string	
	Description	
	Required.	
	Name of the record aggregation definition that's displayed in the record page.	
recordAggregationObject	Field Type  RecordAggregationObject[]	
	<b>Description</b> List of record aggregation objects in the record aggregation join sequence.	
status	Field Type  RecordAggregationDefinitionStatus (enumeration of type string)	
	Description	
	Required.	
	Status of this record aggregation definition.	
	Values are:	
	• Active	
	• Draft	
	• Inactive	

# RecordAggregationObject

Represents an object in the record aggregation join sequence.

developerName  Field Type string  Description Developer name of the reco	ciated with this record aggregation object.  rd aggregation object. May contain only underscores and d must be unique in your org. It must begin with a letter,
Description Required.  API name of the object assort  developerName  Field Type string  Description Developer name of the record alphanumeric characters are	rd aggregation object. May contain only underscores and
Required.  API name of the object assortions are string  Description  Developer name of the record alphanumeric characters are	rd aggregation object. May contain only underscores and
API name of the object assortion  developerName  Field Type string  Description Developer name of the record alphanumeric characters are	rd aggregation object. May contain only underscores and
developerName  Field Type string  Description Developer name of the reco	rd aggregation object. May contain only underscores and
string  Description  Developer name of the reco	
<b>Description</b> Developer name of the reco	
Developer name of the reco alphanumeric characters ar	
alphanumeric characters ar	
not include spaces, not end	with an underscore, and not contain two consecutive
underscores.	
filterLogic Field Type	
string	
Description	
	he record aggregation object filters associated with this
	re applied to the associated object's records. If you define
	tion object filters, but don't specify the sequence in which s are applied by using a logical AND expression.
Available in API version 60.	and later.
masterLabel Field Type	
string	
Description	
Required.	
A user-friendly name for Re	cordAggregationDefinition, which is defined when the
RecordAggregationDefiniti	in is created.
recordAggregationJoinCondition Field Type	
RecordAggregationJoinCor	dition[]
Description	
List of join conditions that a	
recordAggregationObjectFilter Field Type	pply to this record aggregation object.
RecordAggregationObjectF	pply to this record aggregation object.

List of filters that are applied to the records of this record aggregation object.

Description

Field Name	Description
	Available in API version 60.0 and later.

# Record Aggregation Join Condition

Represents a condition in a join between two record aggregation objects.

Field Name	Description
joinField	Field Type string
	Description
	Required.
	API name of the field on the record aggregation object's associated object that is used in the join condition.
navigationSequenceNumber	Field Type int
	<b>Description</b> Required.
	Sequence number corresponding to this join in the join sequence from the object to which the data is aggregated to the object that contains the data being aggregated.
relatedJoinField	Field Type string
	<b>Description</b> Required.
	API name of the field on the related record aggregation object's associated object that is used in the join condition.
relatedRecordAggregationObject	Field Type string
	Description
	Required.
	Second record aggregation object in the join condition.
type	<b>Field Type</b> RecordAggregationJoinConditionType (enumeration of type string)
	<b>Description</b> Required.
	Type of this record aggregation join in the join path from the object to which the data is aggregated to the object that contains the data being aggregated.

Field Name	Description
	Valid values are:
	• AggregateFrom
	• AggregateTo
	• Intermediate

# Record Aggregation Object Filter

Represents a filter that is applied to the records of an object in the record aggregation join sequence. Available in API version 60.0 and later.

Field Name	Description
associatedObjectField	Field Type string
	Description
	Required.
	API name of the associated object's field whose value is used to filter the object's records. The associated object is specified in the record aggregation object.
operator	<b>Field Type</b> RecordAggregationObjectFilterOperator (enumeration of type string)
	Description
	Required.
	Operator used in the filter expression.
	Values are:
	<ul><li>Contains</li><li>Equals</li></ul>
	• GreaterThan
	• GreaterThanOrEquals
	• In
	• LessThan
	• LessThanOrEquals
	• NotEquals
	• NotIn
sequenceNumber	Field Type
	int
	Description
	Required.

Field Name	Description	
	Sequence number of this record aggregation object filter.	
value	Field Type string	
	Description	
	Required.	
	Reference value with which the designated field's values are compared when the filter is applied on the associated object's records.	

## **Declarative Metadata Sample Definition**

The following is an example of a RecordAggregationDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RecordAggregationDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
   <aggregateToObject>PartyRelationshipGroup</aggregateToObject>
   <aggregateFromObject>PartyIncome</aggregateFromObject>
   <status>Active</status>
    <aggregationType>Record</aggregationType>
    <description>Aggregate head of household's income to household/description>
    <displayName>Party Income to Party Relationship Group</displayName>
    <recordAggregationObject>
        <associatedObject>PartyRelationshipGroup</associatedObject>
        <masterLabel>Party Relationship Group Object</masterLabel>
        <developerName>PartyRelationshipGroupObject</developerName>
        <recordAggregationJoinCondition>
            <joinField>Account</joinField>
            <navigationSequenceNumber>1</navigationSequenceNumber>
            <relatedJoinField>Account</relatedJoinField>
<relatedRecordAggregationObject>AccountContactrelationObject</relatedRecordAggregationObject>
            <type>Intermediate</type>
        </recordAggregationJoinCondition>
        <recordAggregationObjectFilter>
          <associatedObjectField>Type</associatedObjectField>
          <operator>Equals</operator>
         <value>Household
          <sequenceNumber>1</sequenceNumber>
        </recordAggregationObjectFilter>
    </recordAggregationObject>
    <recordAggregationObject>
        <associatedObject>AccountContactRelation</associatedObject>
        <masterLabel>Account Contact Relation Object</masterLabel>
        <developerName>AccountContactRelationObject</developerName>
        <recordAggregationJoinCondition>
            <joinField>Contact</joinField>
            <navigationSequenceNumber>2</navigationSequenceNumber>
            <relatedJoinField>Party</relatedJoinField>
```

```
<relatedRecordAggregationObject>PartyIncomeObject/relatedRecordAggregationObject>
           <type>Intermediate</type>
       </recordAggregationJoinCondition>
       <recordAggregationObjectFilter>
         <associatedObjectField>IsPrimaryMember</associatedObjectField>
         <operator>Equals
         <value>true</value>
         <sequenceNumber>1</sequenceNumber>
       </recordAggregationObjectFilter>
   </recordAggregationObject>
    <recordAggregationObject>
       <associatedObject>PartyIncome</associatedObject>
       <masterLabel>Party Income Object</masterLabel>
       <developerName>PartyIncomeObject</developerName>
       <filterLogic>1 AND 2</filterLogic>
       <recordAggregationObjectFilter>
         <associatedObjectField>IncomeFrequency</associatedObjectField>
         <operator>Equals
         <value>Monthly</value>
         <sequenceNumber>1</sequenceNumber>
       </recordAggregationObjectFilter>
       <recordAggregationObjectFilter>
         <associatedObjectField>IncomeStatus</associatedObjectField>
         <operator>Equals</operator>
         <value>Active</value>
         <sequenceNumber>2</sequenceNumber>
       </recordAggregationObjectFilter>
    </recordAggregationObject>
</RecordAggregationDefinition>
```

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

# 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.

# Record Rollup Definitions 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.

#### RecordAggregationDefinition

Represents a data aggregation from one object to another object to which it is connected by other objects in the data model. This object is available in API version 59.0 and later.

#### RecordAggregationJoinCondition

Represents a condition in a join between two record aggregation objects. This object is available in API version 59.0 and later.

#### RecordAggregationObject

Represents an object in the record aggegation join sequence. This object is available in API version 59.0 and later.

#### RecordAggregationObjectFilter

Represents a filter that is applied to the records of an object in the record aggregation join sequence. This object is available in API version 60.0 and later.

#### SEE ALSO:

Developer Guide: Introducing Tooling API

# RecordAggregationDefinition

Represents a data aggregation from one object to another object to which it is connected by other objects in the data model. This object is available in API version 59.0 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**

To access this object, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

### **Fields**

Field	Details
AggregateFromObject	<b>Type</b> picklist
	Properties Filter, Group, Restricted picklist, Sort
	Description
	Required.
	API name of the object from which data is aggregated.

Field	Details
AggregateToObject	Туре
	picklist
	Properties 5th Company of the Compan
	Filter, Group, Restricted picklist, Sort
	Description
	Required.
	API name of the object to which data is aggregated.
AggregationType	Туре
	picklist
	Properties
	Filter, Group, Restricted picklist, Sort
	Description
	Required.
	Type of the data aggregation.
	Possible value is:
	• Record
BatchProcessingDefinitionId	Type
	reference
	<b>Properties</b> Filter, Group, Nillable, Sort
	Description
	Data Processing Engine definition that aggregates data from one record to another.
	This field is a relationship field.
	Relationship Name BatchProcessingDefinition
	Relationship Type Lookup
	Refers To
	BatchCalcJobDefinition
Description	Туре
	textarea
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The description for this record aggregation definition.

Record Rollup Definitions RecordAggregationDefinition

Field	Details
DeveloperName	Туре
	string
	Properties
	Filter, Group, Sort
	<b>Description</b> Unqiue name for the RecordAggregationDefinition object.
	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 <b>Record Type Name</b> . This field is automatically generated, but you can supply your own value if you create the record using the API.
DisplayName	<b>Type</b> string
	Properties
	Filter, Group, idLookup, Sort
	Description
	Required.
	The name of the record aggregation definition that's displayed in the record page.
FullName	Туре
	string
	Properties
	Create, Group, Nillable
	<b>Description</b> The full name of the associated RecordAggregationDefinition type in Metadata API.
	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.
Language	Туре
	picklist
	<b>Properties</b> Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description
	The language of the record aggregation definition.
	Possible values are:
	• da—Danish

Record Rollup Definitions RecordAggregationDefinition

#### **Field Details** de—German en US-English es—Spanish es MX—Spanish (Mexico) fi—Finnish fr—French it—Italian ja—Japanese ko—Korean nl NL—Dutch no-Norwegian pt BR—Portuguese (Brazil) ru—Russian sv—Swedish th—Thai zh CN—Chinese (Simplified) zh\_TW—Chinese (Traditional) MasterLabel Type string **Properties** Filter, Group, Sort Description Label for the record aggregation definition. Metadata Type RecordAggregationDefinition **Properties** Create, Nillable, Update Description The RecordAggregationDefinition's metadata. Status Type picklist Defaulted on create, Filter, Group, Restricted picklist, Sort Description The status of the record aggregation definition. Possible values are: • Active

Field	Details
	• Draft
	• Inactive
	The default value is Draft.

# Record Aggregation Join Condition

Represents a condition in a join between two record aggregation objects. This object is available in API version 59.0 and later.

#### Supported SOAP API Calls

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

### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

#### **Special Access Rules**

To access this object, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

Field	Details
JoinField	<b>Type</b> picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The API name of the field on the record aggregation object's associated object that is used in the join condition.
NavigationSequenceNumber	Type int
	Properties Create, Filter, Group, Sort, Update
	<b>Description</b> The sequence number corresponding to this join in the join sequence from the object to which the data is aggregated to the object that contains the data being aggregated.
RecordAggregationObjectId	<b>Type</b> reference

Field	Details
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> The record aggregation object with which this record aggregation join condition is associated.
	This field is a relationship field.
	Relationship Name RecordAggregationObject
	Relationship Type Lookup
	Refers To RecordAggregationObject
RelatedJoinField	<b>Type</b> picklist
	Properties Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The API name of the field on the related record aggregation object's associated object that is used in the join condition.
RelatedRecordAggrObjectId	Type reference
	Properties Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> The second record aggregation object in the join condition.
	This field is a relationship field.
	Relationship Name RelatedRecordAggrObject

Type

#### Type

picklist

Relationship Type
Lookup

Refers To

RecordAggregationObject

#### **Properties**

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

#### Description

The type of this record aggregation join in the join path from the object to which the data is aggregated to the object that contains the data being aggregated.

**Record Rollup Definitions** RecordAggregationObject

Field	Details
	Possible values are:
	• AggregateFrom
	• AggregateTo
	• Intermediate

## RecordAggregationObject

Represents an object in the record aggregation join sequence. This object is available in API version 59.0 and later.



(1) 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**

To access this object, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

Field	Details
AssociatedObject	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update
	<b>Description</b> The API name of the object associated with this record aggregation object.
DeveloperName	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> The developer name of the record aggregation object. 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.

Record Rollup Definitions RecordAggregationObject

Field	Details
FilterLogic	Туре
	string
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	<b>Description</b> Logical sequence in which the record aggregation object filters associated with this record
	aggregation object are applied to the associated object's records. If you define two or more record aggregation object filters, but don't specify the sequence in which to apply the filters, the filters are applied by using a logical AND expression.
	Available in API version 60.0 and later.
Language	<b>Type</b> picklist
	Properties
	Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update
	Description
	The language of the record aggregation object.
	Possible values are:
	• da—Danish
	• de—German
	• en_US—English
	• es—Spanish
	<ul><li>es_MX—Spanish (Mexico)</li></ul>
	• fi—Finnish
	• fr—French
	• it—Italian
	• ja—Japanese
	• ko—Korean
	• nl_NL—Dutch
	• no—Norwegian
	<ul><li>pt_BR—Portuguese (Brazil)</li><li>ru—Russian</li></ul>
	<ul><li>ru—Russian</li><li>sv—Swedish</li></ul>
	• th—Thai
	• zh CN—Chinese (Simplified)
	• zh TW—Chinese (Traditional)
MasterLabel	Туре
	string

Field	Details
	Properties
	Create, Filter, Group, Sort, Update
	Description
	Label for the record aggregation object.
RecordAggregationDefinitionId	<sup>d</sup> Type
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	The record aggregation definition with which this record aggregation object is associated.
	This field is a relationship field.
	Relationship Name
	Record Aggregation Definition
	Relationship Type Lookup
	•
	Refers To
	Record Aggregation Definition

# Record Aggregation Object Filter

Represents a filter that is applied to the records of an object in the record aggregation join sequence. This object is available in API version 60.0 and later.

### Supported SOAP API Calls

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

#### Supported REST API Methods

DELETE, GET, HEAD, PATCH, POST, Query

### **Special Access Rules**

To access this object, you must have the Record Aggregation permission set license and the Record Aggregation Access permission.

Field	Details
AssociatedObjectField	<b>Type</b> picklist

Field	Details
	Properties Create, Filter, Group, Restricted picklist, Sort, Update  Description API name of the associated object's field whose value is used to filter the object's records.
	The associated object is specified in the record aggregation object.
Operator	Туре
	picklist
	Properties  Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	Operator used in the filter expression.
	Possible values are:
	• Contains
	• Equals
	• GreaterThan
	• GreaterThanOrEquals
	• In
	• LessThan
	• LessThanOrEquals
	• NotEquals
	• NotIn
RecordAggregationObjectId	Туре
	reference
	<b>Properties</b> Create, Filter, Group, Sort
	Description
	The record aggregation object with which this record aggregation object filter is associated.
	This field is a relationship field.
	Relationship Name RecordAggregationObject
	Relationship Type Lookup
	Refers To RecordAggregationObject
SequenceNumber	Type int

Field	Details
	Properties  Create, Filter, Group, Sort, Update
	<b>Description</b> Sequence number of this record aggregation object filter.
Value	<b>Type</b> string
	<b>Properties</b> Create, Filter, Group, Sort, Update
	<b>Description</b> Reference value with which the designated field's values are compared when the filter is applied on the associated object's records.

# **CHAPTER 10** NonProfit Cloud Associated Objects

#### In this chapter ...

- StandardObjedtNameShare
- StrateClipitAtmeOwnethringRe
- StandardObjedtNamel-listory
- SandadDipatNameChangeEvert
- StandardObjectNameFeed

This section provides a list of objects associated to Nonprofit 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.

# 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 <code>StandardObjectNameShare</code> syntax. For example, AccountBrandShare is a sharing entry on an account brand. We list the available associated share objects at the end of this topic. For specific version information, see the standard object documentation.

### **Supported Calls**

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

# **Special Access Rules**

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

Field Name	Details
AccessLevel	Туре
	picklist
	Properties
	Create, Filter, Group, Restricted picklist, Sort, Update
	Description
	The level of access allowed. Values are:
	• All (owner)
	<ul><li>Edit (read/write)</li></ul>
	• Read (read only)
ParentId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	ID of the parent record.
RowCause	Туре
	picklist
	Properties
	Create, Filter, Group, Nillable, Restricted picklist, Sort

Field Name	Details
	<b>Description</b> Reason that the sharing entry exists.
UserOrGroupId	<b>Type</b> reference
	<b>Properties</b> Create, Filter, Group, Sort
	<b>Description</b> ID of the user or group that has been given access to the object.

# StandardObjectNameOwnerShoringRule

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 <code>StandardObjectNameOwnerSharingRule</code> syntax. For example,

Channel Program Owner Sharing Rule 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, contact Salesforce customer support. But we recommend that you use Metadata API to programmatically update owner sharing rules instead 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.

Field Name	Details
AccessLevel	<b>Type</b> picklist
	<b>Properties</b> Create, Filter, Group, Restricted picklist, Sort, Update

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

Field Name	Details
UserOrGroupId	Туре
	reference
	Properties
	Create, Filter, Group, Sort
	Description
	ID of the user or group that you are granting access to.

### 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 <code>StandardObjectName</code>History syntax. For example, AccountHistory represents the history of changes to the values of an account record's fields. We list the available associated history objects at the end of this topic. For specific version information, see the documentation for the standard object.

### **Supported Calls**

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

### **Special Access Rules**

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

Field Name	Details
StandardObjectNameId	<b>Type</b> reference
	<b>Properties</b> Filter, Group, Sort
	<b>Description</b> ID of the standard object.
DataType	<b>Type</b> picklist
	<b>Properties</b> Filter, Group, Nillable, Restricted picklist, Sort
	<b>Description</b> Data type of the field that was changed.

Field Name	Details
Field	<b>Type</b> picklist
	<b>Properties</b> Filter, Group, Restricted picklist, Sort
	<b>Description</b> Name of the field that was changed.
NewValue	<b>Type</b> anyType
	Properties Nillable, Sort
	<b>Description</b> New value of the field that was changed.
OldValue	<b>Type</b> anyType
	Properties Nillable, Sort
	<b>Description</b> Old value of the field that was changed.

## StandardObjectNameChangeEvent

A Change Event 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**

- Not all objects may 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 Name

Change events are available for all custom objects and a subset of standard objects. 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.

```
"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 Support Change Events**

These objects have associated ChangeEvent objects.

- GiftCommitment
- GiftCommitmentSchedule
- GiftSoftCredit
- GiftTransaction
- GiftRefund
- GiftTransactionDesignation
- OutreachSourceCode

### 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 <code>StandardObjectNameFeed</code> 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 Records 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.

Field	Details
BestCommentId	<b>Type</b> reference
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> The ID of the comment marked as best answer on a question post.
Body	<b>Type</b> textarea
	Properties Nillable, Sort
	<b>Description</b> The body of the post. Required when Type is TextPost. Optional when Type is ContentPost or LinkPost.
CommentCount	<b>Type</b> int
	<b>Properties</b> Filter, Group, Sort
	<b>Description</b> The number of comments associated with this feed item.

Field	Details
ConnectionId	<b>Type</b> reference
	<b>Properties</b> Filter, Group, Nillable, Sort
	<b>Description</b> When a PartnerNetworkConnection modifies a record that is tracked, the CreatedBy field contains the ID of the system administrator. The ConnectionId contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.
InsertedById	<b>Type</b> reference
	<b>Properties</b> Group, Nillable, Sort
	<b>Description</b> ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the InsertedBy value is set to the ID of the context user.
isRichText	<b>Type</b> boolean
	Properties  Defaulted on create, Filter, Group, Sort
	Description Indicates whether the feed item Body contains rich text. If you post a rich text feed comment using SOAP API, set IsRichText to true and escape HTML entities from the body. Otherwise, the post is rendered as plain text.
	Rich text supports the following HTML tags:
	•
	Tip: Though the tag isn't supported, you can use    to create lines.
	• <a></a>
	• <b></b>
	• <code></code>
	• <i></i>
	• <u></u>
	• <s></s>
	• <ul></ul>
	<pre>• <ol> • <li><li>&lt;</li></li></ol></pre>
	• \11/

Field	Details
	<ul> <li><img/>         The <img/> tag is accessible only through the API and must reference files in Salesforce similar to this example: <img src="sfdc://069B0000000mjh"/></li> </ul>
LikeCount	Type int  Properties Filter, Group, Sort  Description
LinkUrl	Type url  Properties Nillable, Sort  Description The URL of a LinkPost.
NetworkScope	Type picklist  Properties Group, Nillable, Restricted picklist, Sort  Description Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org.  NetworkScope can have the following values:  NetworkId—The ID of the Experience Cloud site in which the FeedItem is available. If left empty, the feed item is only available in the default Experience Cloud site.  AllNetworks—The feed item is available in all Experience Cloud sites.  Note the following exceptions for NetworkScope:  Only feed items with a Group or User parent can set a NetworkId or a null value for
ParentId	<ul> <li>Only leed items with a Group or oser parent can set a Network1d or a null value for NetworkScope.</li> <li>For feed items with a record parent, users can set NetworkScope only to AllNetworks.</li> <li>You can't filter a feed item on the NetworkScope field.</li> </ul> Type <ul> <li>reference</li> <li>Properties</li> <li>Filter, Group, Sort</li> </ul>

Field	Details
	<b>Description</b> ID of the record that is tracked in the feed. The detail page for the record displays the feed.
RelatedRecordId	<b>Type</b> reference
	<b>Properties</b> Group, Nillable, Sort
	<b>Description</b> ID of the ContentVersion record associated with a ContentPost. This field is null for all posts except ContentPost.
Title	<b>Type</b> string
	<b>Properties</b> Group, Nillable, Sort
	<b>Description</b> The title of the feed item. When the Type is LinkPost, the LinkUrl is the URL and this field is the link name.
Туре	<b>Type</b> picklist
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	<b>Description</b> The type of feed item:
	<ul> <li>ActivityEvent—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging).</li> </ul>
	For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence.
	<ul> <li>AdvancedTextPost—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post.</li> </ul>
	<ul> <li>AnnouncementPost—Not used.</li> </ul>
	<ul> <li>ApprovalPost—generated when a user submits an approval.</li> </ul>
	<ul> <li>BasicTemplateFeedItem—Not used.</li> </ul>
	<ul> <li>CanvasPost—a post made by a canvas app posted on a feed.</li> </ul>
	<ul> <li>CollaborationGroupCreated—generated when a user creates a public group.</li> </ul>
	<ul> <li>CollaborationGroupUnarchived—Not used.</li> </ul>
	<ul> <li>ContentPost—a post with an attached file.</li> </ul>

#### Field Details

- CreatedRecordEvent—generated when a user creates a record from the publisher.
- DashboardComponentAlert—generated when a dashboard metric or gauge exceeds a user-defined threshold.
- DashboardComponentSnapshot—created when a user posts a dashboard snapshot on a feed.
- LinkPost—a post with an attached URL.
- PollPost—a poll posted on a feed.
- ProfileSkillPost—generated when a skill is added to a user's Chatter profile.
- QuestionPost—generated when a user posts a question.
- ReplyPost—generated when Chatter Answers posts a reply.
- RypplePost—generated when a user creates a Thanks badge in WDC.
- TextPost—a direct text entry on a feed.
- TrackedChange—a change or group of changes to a tracked field.
- UserStatus—automatically generated when a user adds a post. Deprecated.

The following values appear in the Type picklist for all feed objects but apply only to CaseFeed:

- CaseCommentPost—generated event when a user adds a case comment for a case object
- EmailMessageEvent—generated event when an email related to a case object is sent or received
- CallLogPost—generated event when a user logs a call for a case through the user interface. CTI calls also generate this event.
- ChangeStatusPost—generated event when a user changes the status of a case
- AttachArticleEvent—generated event when a user attaches an article to a case



#### 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:

Field	Details
	<ul> <li>For record posts, Visibility is set to InternalUsers for all internal users by default.</li> </ul>
	<ul> <li>External users can set Visibility only to AllUsers.</li> </ul>
	<ul> <li>On user and group posts, only internal users can set Visibility to InternalUsers.</li> </ul>

# 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.