Public Sector Solutions Developer Guide

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CONTENTS

Chapter 1: Public Sector Solutions Data Models . . . 1

Application and Authorization Data Model . . . 2
Benefit Management Data Model . . . 3
Grantmaking and Budget Management Data Model . . . 5
Interaction Summary Data Model . . . 6
Investigative Case Management Data Model . . . 7
Provider Management Data Model . . . 9
Public Complaint Data Model . . . 11
Regulatory Area, Fees, and Enforcement Data Model . . . 12
Social Program Management Data Model . . . 13
Talent Recruitment Management Data Model . . . 14
Visits, Inspections, and Dynamic Assessments Data Model . . . 15

Chapter 2: Public Sector Solutions Standard Objects . . . 16

Accreditation . . . 22
ActionPlan . . . 26
ActionPlanBaseTemplateAsgn . . . 29
ActionPlanItem . . . 32
ActionPlanTemplate . . . 34
ActionPlanTemplateItem . . . 40
ActionPlanTemplateItemValue . . . 43
ActionPlanTemplateVersion . . . 48
ActionPlanTemplateAssignment . . . 50
ActionPlanTmplItmAssessmentInd . . . 53
ApplicationForm . . . 55
ApplicationFormEvaluation . . . 59
ApplicationFormEvalPtcp . . . 62
ApplicationFormParticipant . . . 65
ApplicationFormRelation . . . 68
ApplicationDecision . . . 70
ApplicationRenderMethod . . . 73
ApplicationReview . . . 76
ApplicationStageDefinition . . . 80
ApplicationTimeline . . . 83
AssessmentIndicatorDefinition . . . 85
AssessmentIndDefinedValue . . . 87
AssessmentIndValue . . . 88
AssessmentTask . . . 90
AssessmentTaskDefinition . . . 93

AssessmentTaskContentDocument . . . 94
AssessmentTaskIndDefinition . . . 96
AuthApplicationAsset . . . 97
AuthApplicationPlace . . . 99
AuthLocationAccessSchedule . . . 100
Award . . . 102
Benefit . . . 106
BenefitAssignment . . . 112
BenefitAssignmentAdjustment . . . 120
BenefitDisbursement . . . 124
BenefitDisbursementAdj . . . 132
BenefitItemCode . . . 134
BenefitPrvdSearchableFld . . . 136
BenefitSchedule . . . 147
BenefitScheduleAssignment . . . 150
BenefitSession . . . 152
BenefitSpecialty . . . 155
BenefitType . . . 157
BoardCertification . . . 160
Budget . . . 164
BudgetAllocation . . . 168
BudgetCategory . . . 171
BudgetCategoryValue . . . 173
BudgetParticipant . . . 177
BudgetPeriod . . . 179
BusinessLicense . . . 181
BusinessLicenseApplication . . . 187
BusinessMilestone . . . 196
BusinessProfile . . . 200
BusinessType . . . 202
BusRegAuthorizationType . . . 204
BusRegAuthTypeDependency . . . 205
CareBarrier . . . 207
CareBarrierType . . . 211
CarePlan . . . 214
CarePlanDetail . . . 218
CarePlanTemplate . . . 222
CarePlanTemplateBenefit . . . 223
CarePlanTemplateGoal . . . 225
CareProviderAdverseAction . . . 227
CareProviderFacilitySpecialty . . . 232
CareSpecialty . . . 235
CaseEpisode . . . 238
CaseParticipant . . . 243

CaseProceeding 246
CaseProceedingComplaint 251
CaseProceedingInfraction 252
CaseProceedingParticipant 255
CaseProceedingResult 258
CaseProgram 260
Claim 262
ClaimItem 269
ClaimParticipant 271
CodeSet 274
CodeSetBundle 278
ComplaintCase 282
ComplaintParticipant 284
Contact 288
ContactProfile 299
CourseOffering 304
CustodyChainEntry 306
CustodyItem 310
CustodyItemRelation 313
CustodyItemRgltyCodeVio 316
DocumentChecklistItem 318
Employee2 322
Employment 325
EmploymentOffer 329
EmploymentOfferVettingEval 335
Examination 337
FundingAward 338
FundingAwardAmendment 343
FundingAwardParticipant 346
FundingAwardRequirement 349
FundingAwardRqmtSection 353
FundingDisbursement 358
FundingOpportunity 361
FundingOppParticipant 366
GenericVisitTask 368
GenericVisitTaskContext 372
GoalAssignment 377
GoalAssignmentDetail 382
GoalDefinition 385
GnrcVstKeyPerformanceInd 388
GnrcVstTaskContextRelation 393
HealthcareFacility 395
HealthcarePractitionerFacility 398
HealthcareProvider 404

HealthcareProviderNpi . . . 411
HealthcareProviderSpecialty . . . 414
IndividualApplication . . . 418
IndividualApplicationTask . . . 426
IndividualApplnParticipant . . . 431
InspectionAssessmentInd . . . 434
InspectionType . . . 436
InsurancePolicy . . . 438
InsurancePolicyTransaction . . . 454
IntakeFormSection . . . 458
Interaction . . . 463
InteractionAttendee . . . 467
InteractionRelatedAccount . . . 470
InteractionSumDiscussedAccount . . . 472
InteractionSummary . . . 474
JobApplnSearchableField . . . 479
JobPosition . . . 487
JobPositionPayGrade . . . 492
JobPostingSearchableField . . . 494
JobPstnRecruitmentRqs . . . 502
Location . . . 504
Occupation . . . 510
OccupationGroup . . . 514
OmniAssessmentTask . . . 516
OmniDataPack . . . 521
OmniDataTransform . . . 521
OmniDataTransformItem . . . 521
OmniESignature . . . 521
OmniProcess . . . 521
OmniProcessCompilation . . . 521
OmniProcessElement . . . 521
OmniProcessOmniAsmtTask . . . 522
OmniProcessTransientData . . . 523
OmniScriptSavedSession . . . 523
OmniUiCard . . . 523
OperatingHours . . . 524
OperatingHoursHoliday . . . 525
PartyCertifiedCapacity . . . 527
PartyExpense . . . 532
PartyFinancialAsset . . . 538
PartyIncome . . . 543
PartyProfile . . . 548
PartyProfileAddress . . . 561
PayGrade . . . 566

PayGradeStep 569
PayGradeStepLocation 572
PaymentRequest 576
PaymentRequestLine 582
PersonDisability 588
PersonEducation 591
PersonEmployment 596
PersonExamination 600
PersonLifeEvent 603
Polygon 607
Position 608
PositionPayGrade 612
PreliminaryApplicationRef 614
Program 616
ProgramCohortMember 620
ProgramEnrollment 624
PublicApplicationParticipant 629
PublicComplaint 632
RecruitmentContentSection 641
RecruitmentPosting 644
RecruitmentPostingCntntSect 648
RecruitmentRequisition 650
RecruitmentRequisitionLoc 654
RecruitmentRequisitionPtcp 656
RecurrenceSchedule 659
ReceivedDocument 663
ReceivedDocumentType 666
Referral 668
RegulatoryAuthority 678
RegulatoryAuthorizationType 679
RegulatoryCode 682
RegulatoryCodeUse 685
RegCodeAssessmentInd 686
RegulatoryCodeViolation 688
RegulatoryTrxnFee 692
RegulatoryTrxnFeeItem 694
RegAuthorizationTypeProduct 696
SignatureTask 698
SignatureTaskLineItem 699
TagCategory 700
TimeSlot 703
TrainingCourseParticipant 706
TrnCourse 708
VettingEvaluation 710

ViolationEnforcementAction . . . 714
ViolationType . . . 718
ViolationTypeUse . . . 720
ViolationTypeAssessmentInd . . . 721
Visit . . . 723
Visitor . . . 727
VisitedParty . . . 729
VolunteerProject . . . 730
WorkerCompCoverageClass . . . 733

Chapter 3: PublicSectrSltn Namespace . . . 737

AssessmentResponses Class . . . 738
AssessmentResponses Methods . . . 739
BenefitDisbursementAdjDetail Class . . . 739
BenefitDisbursementAdjDetail Properties . . . 740
BenefitDisbursementDetail Class . . . 741
BenefitDisbursementDetail Properties . . . 741
BenefitDisbursementIAOutput Class . . . 744
BenefitDisbursementIAOutput Properties . . . 745
CreateOutboundReferral Class . . . 746
GetAccountsAndContacts Class . . . 751
GetAccountsAndContacts Methods . . . 752

Chapter 4: Public Sector Solutions APIs . . . 754

REST Reference . . . 755
Resources . . . 755
Request Bodies . . . 775
Response Bodies . . . 787

Chapter 5: Public Sector Solutions Standard Invocable Actions . . . 809

Benefit Disbursement Action . . . 810
Run Record Aggregation Batch Processing Definition Action . . . 812

Chapter 6: Public Sector Solutions Tooling API Objects . . . 815

ApplicationRecordTypeConfig . . . 816

Chapter 7: Public Sector Solutions Metadata API Types . . . 818

ApplicationRecordTypeConfig . . . 819
DocumentChecklistSettings . . . 820
Flow for Public Sector Solutions . . . 822
IndustriesSettings . . . 822

Chapter 8: Public Sector Solutions Associated Objects . . . 824

StandardObjectNameShare . . . 825
StandardObjectNameFeed . . . 826

StandardObjectNameOwnerSharingRule . . . 832
StandardObjectNameHistory . . . 835
StandardObjectNameChangeEvent . . . 837

Chapter 9: StandardValueSet Names and Standard Picklist Fields . . . 840

Chapter 10: Accounting Subledger . . . 843

Accounting Subledger Data Model Overview . . . 844
Accounting Subledger Standard Objects . . . 844
- AccountingFieldMapping . . . 844
- AccountingModelConfig . . . 848

Accounting Subledger Fields on Standard Objects . . . 853
- TransactionJournal . . . 853

Accounting Subledger Metadata Types . . . 857
- AccountingFieldMapping . . . 857
- AccountingModelConfig . . . 860
- Flow for Accounting Subledger . . . 864

Settings . . . 864
- AccountingSettings . . . 865

Chapter 11: Action Launcher . . . 867

Action Launcher Tooling Objects . . . 868
- RecordActionDeployment . . . 868

Action Launcher Metadata Types . . . 872
- RecordActionDeployment . . . 873

Chapter 12: Business Rules Engine . . . 879

Expression Set . . . 880
- Expression Set Standard Objects . . . 880
- Expression Set Business APIs . . . 895
- Expression Set Invocable Actions . . . 945
- Expression Set Metadata API Types . . . 947
- Expression Set Tooling API Objects . . . 979

Decision Table . . . 989
- Decision Table Tooling API Objects . . . 989
- Apex Reference . . . 1006
- Decision Table APIs . . . 1010
- Decision Table Metadata API . . . 1021
- Decision Table Invocable Actions . . . 1029

Decision Explainer for Expression Set . . . 1034
- Decision Explainer Standard Objects . . . 1035
- Decision Explainer Business APIs . . . 1040
- Decision Explainer Metadata API Types . . . 1048
- Decision Explainer Tooling API Objects . . . 1051

Lookup Tables . . . 1058

Decision Matrix Data Model Overview . . . 1058
Lookup Tables Standard Objects . . . 1059
Lookup Tables Business APIs . . . 1073
BusinessRule Namespace . . . 1115
Lookup Tables Invocable Actions . . . 1119
Lookup Tables Metadata API Types . . . 1120
Lookup Tables Tooling API Objects . . . 1127

Chapter 13: Criteria-Based Search and Filter . . . 1153

Metadata API Types . . . 1154
SearchableObjDataSyncInfo . . . 1154
SearchCriteriaConfiguration . . . 1158
SearchResultActionConfig . . . 1163
Tooling API Objects . . . 1166
SearchableObjDataSyncInfo . . . 1166
SearchCriteriaConfiguration . . . 1168
SearchResultActionConfig . . . 1173
Business APIs . . . 1176
Resources . . . 1176
Request Bodies . . . 1179
Response Bodies . . . 1182

Chapter 14: Decision Explainer . . . 1195

Decision Explainer APIs . . . 1196
REST Reference . . . 1196
Decision Explainer Tooling API Objects . . . 1203
ApplicationSubtypeDefinition . . . 1204
BusinessProcessTypeDef . . . 1206
ExplainabilityActionDef . . . 1208
ExplainabilityActionVersion . . . 1211

Chapter 15: Discovery Framework . . . 1215

Discovery Framework Standard Objects . . . 1216
Assessment . . . 1217
AssessmentDefinition . . . 1224
AssessmentQuestion . . . 1227
AssessmentQuestionAssignment . . . 1232
AssessmentQuestionResponse . . . 1234
AssessmentQuestionSet . . . 1240
AssessmentQuestionVersion . . . 1242
AssessmentQuestionVerChoice . . . 1247
AssessmentReason . . . 1249
AssessmentSavedSession . . . 1251
AssessmentSignature . . . 1253

AssessmentStagedData . . . 1256
DocumentDecisionRequirement . . . 1258
ExternalAssessmentDefinition . . . 1261
OmniProcessAsmtQuestionVer . . . 1263
SuggestedAssessmentDef . . . 1266
SuggestedAssessmentReason . . . 1269
Discovery Framework Metadata API Types . . . 1271
AssessmentQuestion . . . 1272
AssessmentQuestionSet . . . 1277
DocumentCategory . . . 1279
DocumentCategoryDocumentType . . . 1280
DocumentType . . . 1282
OmniScript . . . 1284
Supported Metadata Channels . . . 1294
Flow for Discovery Framework . . . 1295
Discovery Framework Invocable Actions . . . 1296
Get Assessment Response Summary . . . 1296
Discovery Framework Tooling API Objects . . . 1299
AssessmentQuestionConfig . . . 1300
AssessmentQuestionSetConfig . . . 1301
Discovery Framework Connect APIs . . . 1303
Discovery Framework API Resources . . . 1303
Discovery Framework API Requests . . . 1307
Discovery Framework API Responses . . . 1315
DiscoveryFramework_Prefill Integration Procedure . . . 1331

Chapter 16: Engagement . . . 1334

Engagement Data Model . . . 1335
EngagementAttendee . . . 1335
EngagementInteraction . . . 1339
EngagementTopic . . . 1345
Engagement Connect APIs . . . 1350
Engagement API Resources . . . 1350
Engagement API Requests . . . 1354
Engagement API Responses . . . 1365
Apex Reference . . . 1370
ConnectApi Namespace . . . 1370
DataRetrieval Namespace . . . 1383
Integrate the Engagement Objects Into Your CTI System . . . 1395

Chapter 17: Group Membership and Households . . . 1399

Group Membership and Households Data Model . . . 1400
Group Membership and Households Standard Objects . . . 1400
AccountAccountRelation . . . 1401

AccountContactRelation . . . 1405
ContactContactRelation . . . 1408
PartyRelationshipGroup . . . 1412
PartyRoleRelation . . . 1417
Group Membership and Households Business APIs . . . 1420
REST Reference . . . 1421

Chapter 18: Identity Verification . . . 1450

Identity Verification Connect APIs . . . 1451
Resources . . . 1451
Requests . . . 1452
Responses . . . 1454
Identity Verification Data Model . . . 1458
IdentityVerificationProcDef . . . 1458
IdentityVerificationProcDtl . . . 1460
IdentityVerificationProcFld . . . 1465
Identity Verification Metadata API . . . 1470
Flow for Identity Verification . . . 1470
IdentityVerificationProcDef . . . 1471
Identity Verification Tooling API Objects . . . 1479
IdentityVerificationProcDef . . . 1479
IdentityVerificationProcDtl . . . 1482
IdentityVerificationProcFld . . . 1489

Chapter 19: Intelligent Document Reader . . . 1496

Intelligent Document Reader Standard Objects . . . 1497
OcrDocumentScanResult . . . 1497
OcrSampleDocument . . . 1501
OcrSampleDocumentField . . . 1504
OcrSampleDocumentPage . . . 1507
OcrSampleDocumentPageItem . . . 1509
OcrTargetObject . . . 1510
OcrTargetObjFieldMapping . . . 1511
OcrTemplate . . . 1513
OcrTemplateSampleDocument . . . 1515
Intelligent Document Reader Field on DocumentType . . . 1516
Apex Reference . . . 1517
DocumentReader Namespace . . . 1517
Intelligent Document Reader Business APIs . . . 1529
REST Reference . . . 1529
OCR Metadata API Types . . . 1563
Flow for Intelligent Document Reader . . . 1563
OcrSampleDocument . . . 1564
OcrTemplate . . . 1568

Settings . . . 1572
OCR Tooling API Objects . . . 1574
OcrSampleDocument . . . 1574
OcrSampleDocumentField . . . 1577
OcrSampleDocumentPage . . . 1581
OcrSampleDocumentPageItem . . . 1582
OcrTargetObject . . . 1584
OcrTargetObjFieldMapping . . . 1586
OcrTemplate . . . 1588
OcrTemplateSampleDocument . . . 1591
Intelligent Document Reader Standard Invocable Actions . . . 1593
Fetch Active OCR Templates Action . . . 1593
Fetch Extracted Text Action . . . 1596
Initiate Text Extraction Action . . . 1603

Chapter 20: Interest Tagging . . . 1607

Interest Tagging Business APIs . . . 1608
REST Reference . . . 1609

Chapter 21: Omnistudio Business APIs . . . 1627

REST Reference . . . 1628
Expression Set . . . 1628
Decision Matrix . . . 1664

Chapter 22: Outcome Management Developer Guide . . . 1680

Introduction to Outcome Management . . . 1681
Outcome Management Data Model . . . 1681
Outcome Management Standard Objects . . . 1682
ImpactStrategy . . . 1682
ImpactStrategyAssignment . . . 1685
IndicatorAssignment . . . 1687
IndicatorDefinition . . . 1691
IndicatorPerformancePeriod . . . 1694
IndicatorResult . . . 1697
Outcome . . . 1700
OutcomeActivity . . . 1703
TimePeriod . . . 1707
UnitOfMeasure . . . 1709

Chapter 23: Record Alerts . . . 1711

Record Alerts Standard Objects . . . 1712
RecAlrtDataSrcExpSetDef . . . 1712
RecordAlert . . . 1721
RecordAlertActionableTarget . . . 1726
RecordAlertCategory . . . 1728

RecordAlertCategoryLocalization . . . 1730
RecordAlertDataSource . . . 1731
RecordAlertDataTranslation . . . 1734
RecordAlertTemplate . . . 1735
Apex Reference . . . 1737
ConnectApi Namespace . . . 1737
Record Alerts APIs . . . 1744
REST Reference . . . 1745
Record Alerts Metadata API Types . . . 1762
RecordAlertCategory . . . 1762
RecordAlertDataSource . . . 1764
Record Alerts Tooling API Objects . . . 1766
RecordAlertCategory . . . 1766
RecordAlertDataSource . . . 1769

Chapter 24: Record Rollup Definitions . . . 1774

Record Rollup Definitions Standard Objects . . . 1775
RecordAggregationResult . . . 1775
Record Rollup Definitions Business APIs . . . 1777
REST Reference . . . 1778
Record Rollup Definitions Metadata API Types . . . 1785
RecordAggregationDefinition . . . 1786
Record Rollup Definitions Tooling API Objects . . . 1792
RecordAggregationDefinition . . . 1793
RecordAggregationJoinCondition . . . 1797
RecordAggregationObject . . . 1799
RecordAggregationObjectFilter . . . 1801

Chapter 25: Service Process Studio . . . 1804

Service Process Studio Metadata Types . . . 1805
IntegrationProviderDef . . . 1805
ServiceProcess . . . 1810
Apex Reference . . . 1816
ConnectApi Namespace . . . 1816
industriesintegrationfwk Namespace . . . 1822
industriesserviceprocess Namespace . . . 1826
Sample Apex Class to Create Case Records for Service Process Requests . . . 1829
Service Process Studio Invocable Actions . . . 1835
Integration Definition Actions . . . 1835
Service Process Studio Connect APIs . . . 1838
Resources . . . 1838
Request Bodies . . . 1843
Response Bodies . . . 1846
Service Process Studio Connect API Use Cases . . . 1848

Transaction Dispute Management Use Case 1848

Chapter 26: Timeline 1853

Timeline Standard Object 1854

TimelineObjectDefinitionLocalization 1854

Timeline Tooling API Object 1860

TimelineObjectDefinition 1860

CHAPTER 1 Public Sector Solutions Data Models

In this chapter ...

- Application and Authorization Data Model
- Benefit Management Data Model
- Grantmaking and Budget Management Data Model
- Interaction Summary Data Model
- Investigative Case Management Data Model
- Provider Management Data Model
- Public Complaint Data Model
- Regulatory Area, Fees, and Enforcement Data Model
- Social Program Management Data Model
- Talent Recruitment Management Data Model
- Visits, Inspections, and Dynamic Assessments Data Model

Public Sector Solutions uses a suite of standard Salesforce objects to structure and store data related to licensing and permitting, inspections and assessments, case and program management, benefit management, grantmaking, and other features. To better understand how features work, it helps to look at the data models, which are graphical representations of collections of objects and their relationships.

To learn more about setting up and using Public Sector Solutions objects, see the Public Sector Solutions Admin Guide.

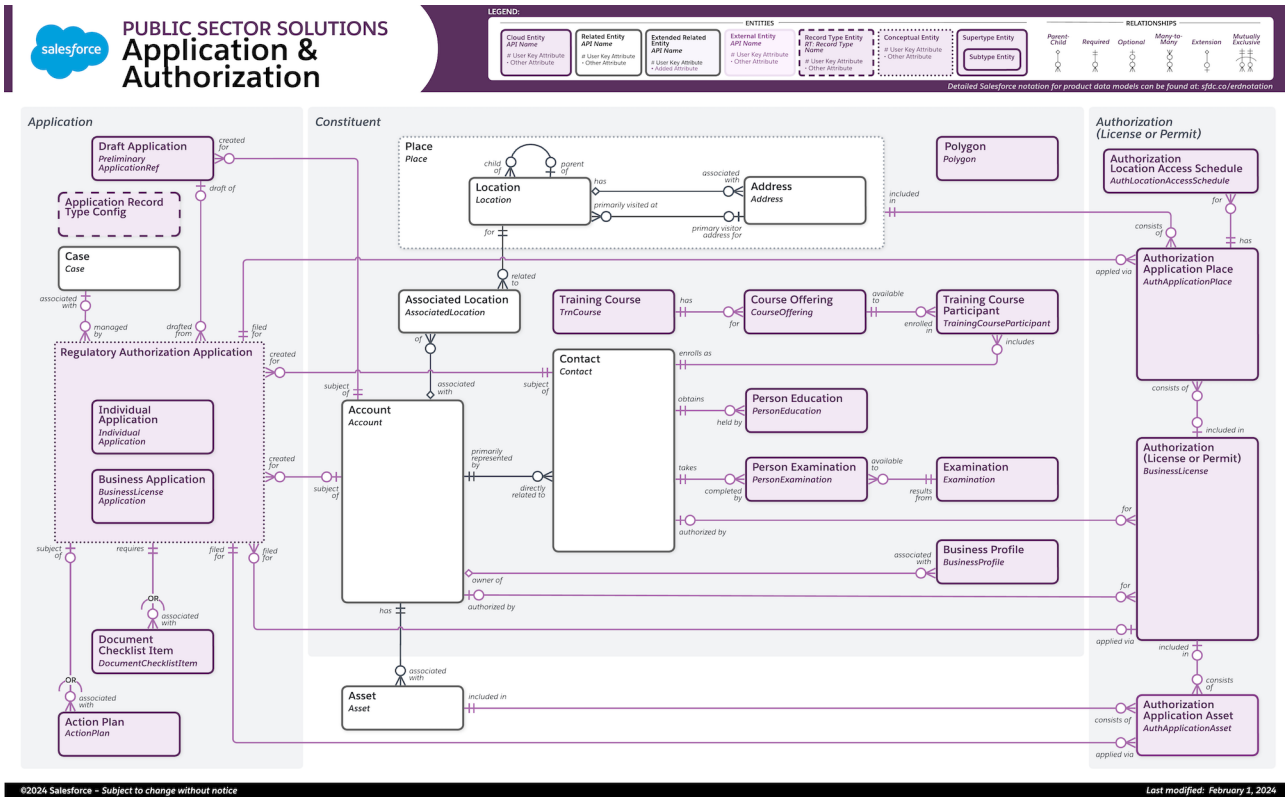
Application and Authorization Data Model

Learn about the objects and relationships used for applications and authorizations 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 Application & Authorization data model architecture.

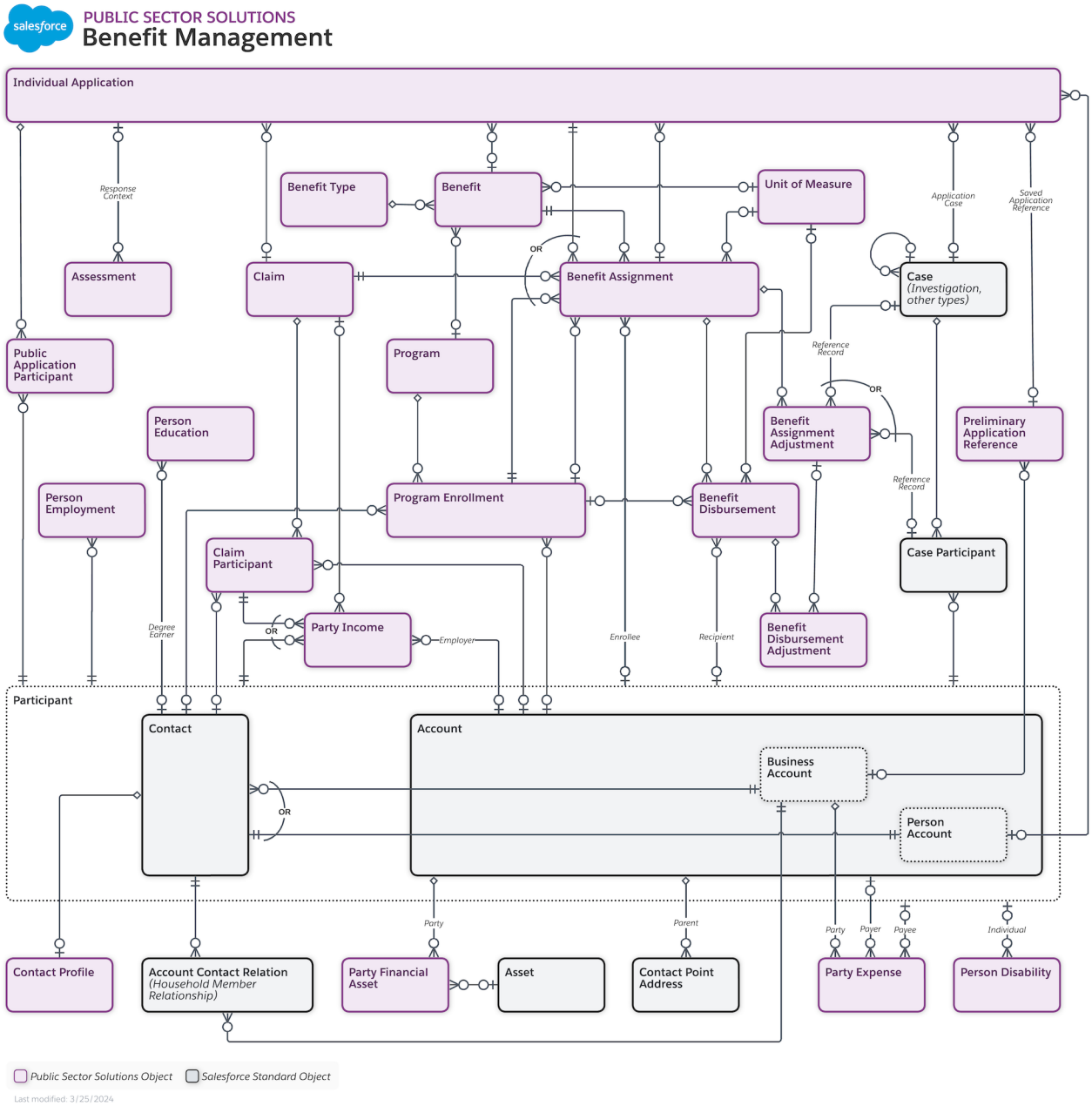
Benefit Management Data Model

Learn about the objects and relationships used for benefit 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 Benefit Management data model architecture.

Grantmaking and Budget Management Data Model

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

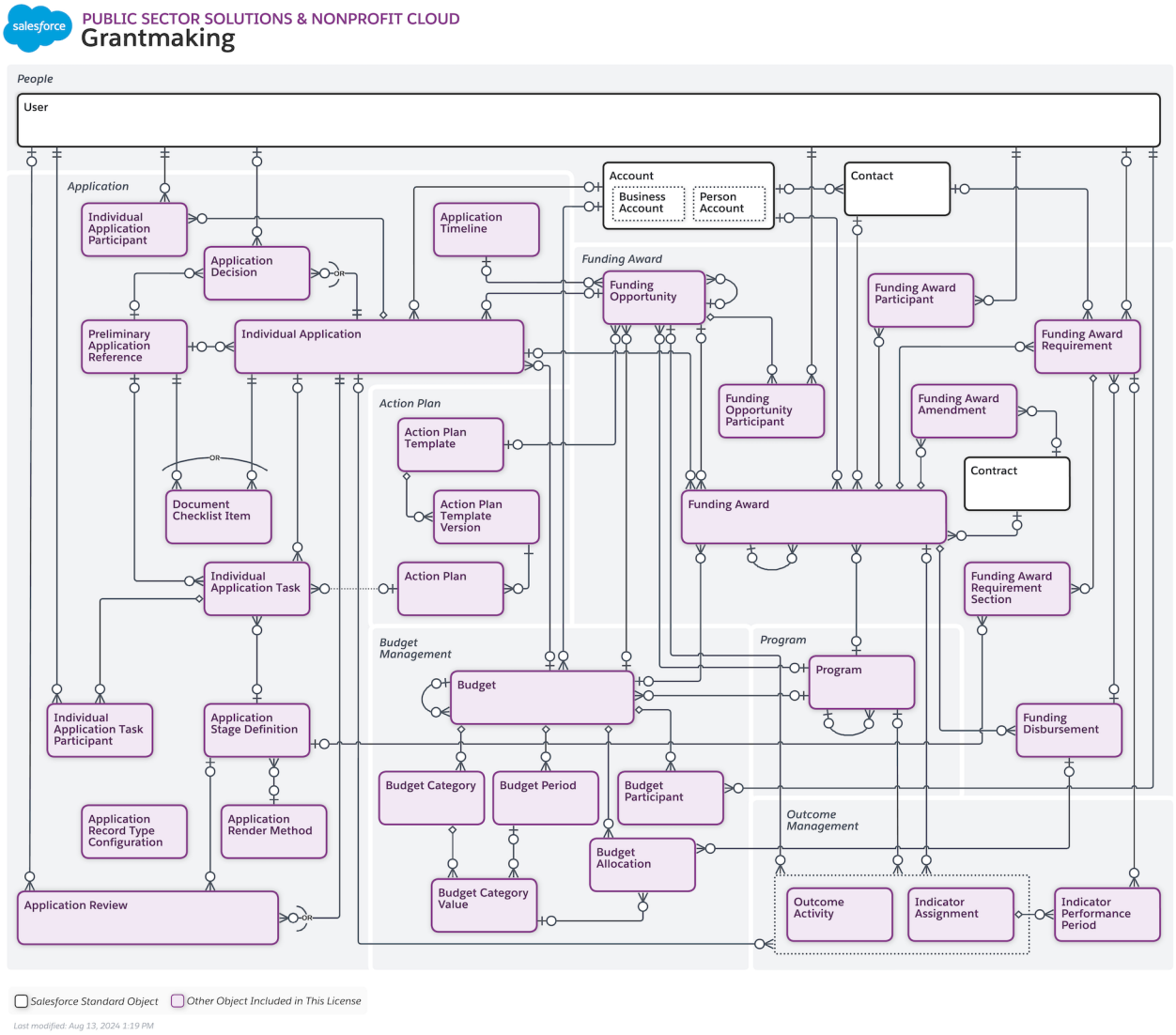
The Grantmaking and Budget Management data model provides a set of objects and fields that you can use to store and manage information about grants you award and the budgets associated with them.

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



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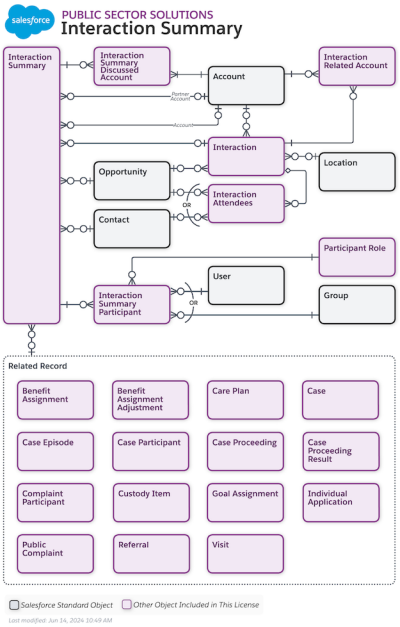
Interaction Summary Data Model

Learn about the objects and relationships used for interaction summary in Public Sector Solutions.

EDITIONS

Available in: Lightning Experience

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



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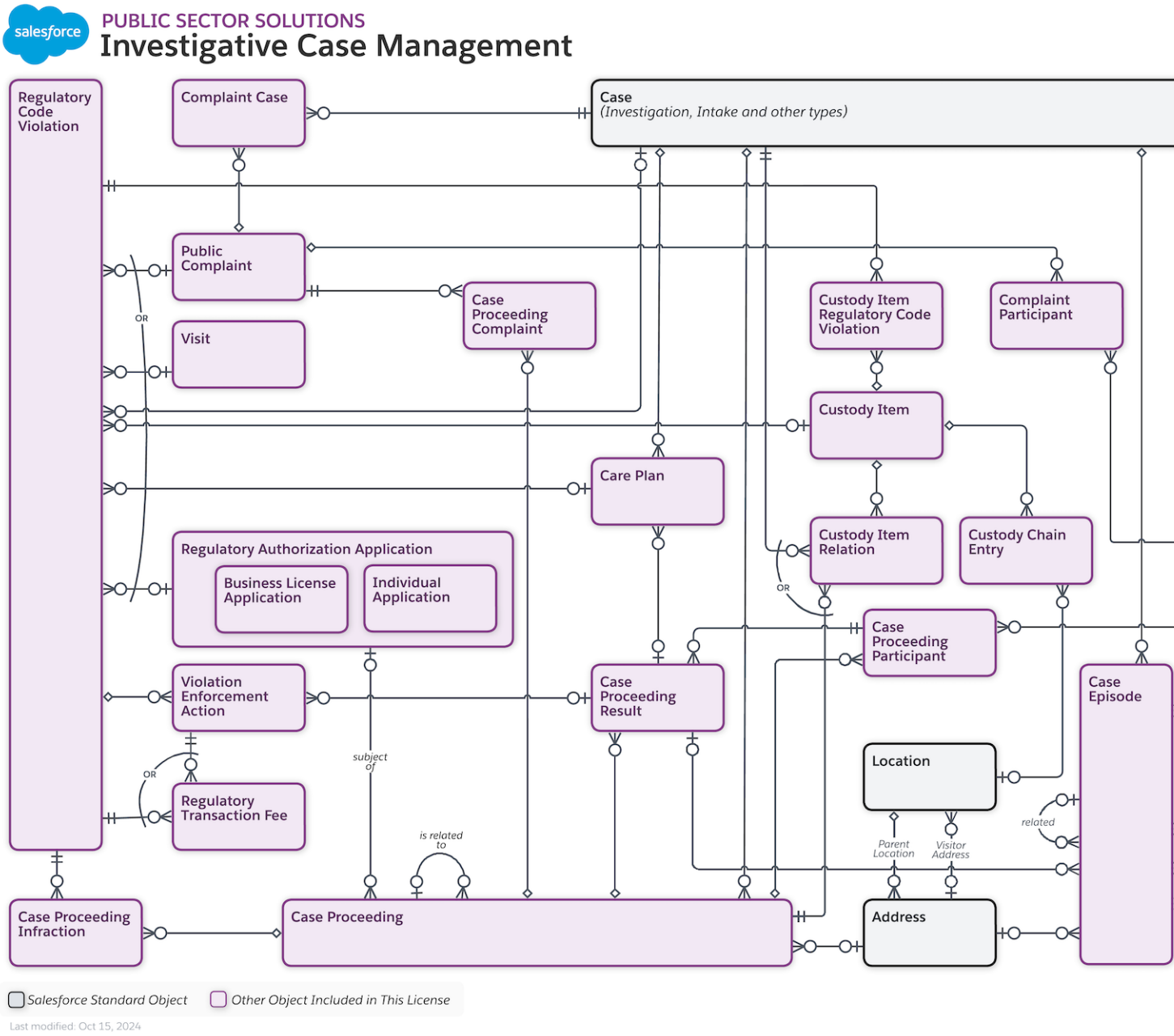
Investigative Case Management Data Model

Learn about the objects and relationships used for investigative case 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 Investigative Case Management data model architecture.

SEE ALSO:

Salesforce Developer Guide: Interaction Summary Data Model

Salesforce Developer Guide: Group Membership and Households Data Model

Salesforce Developer Guide: Public Complaint Data Model

Salesforce Developer Guide: Visits, Inspections, and Dynamic Assessments Data Model

Provider Management Data Model

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

EDITIONS

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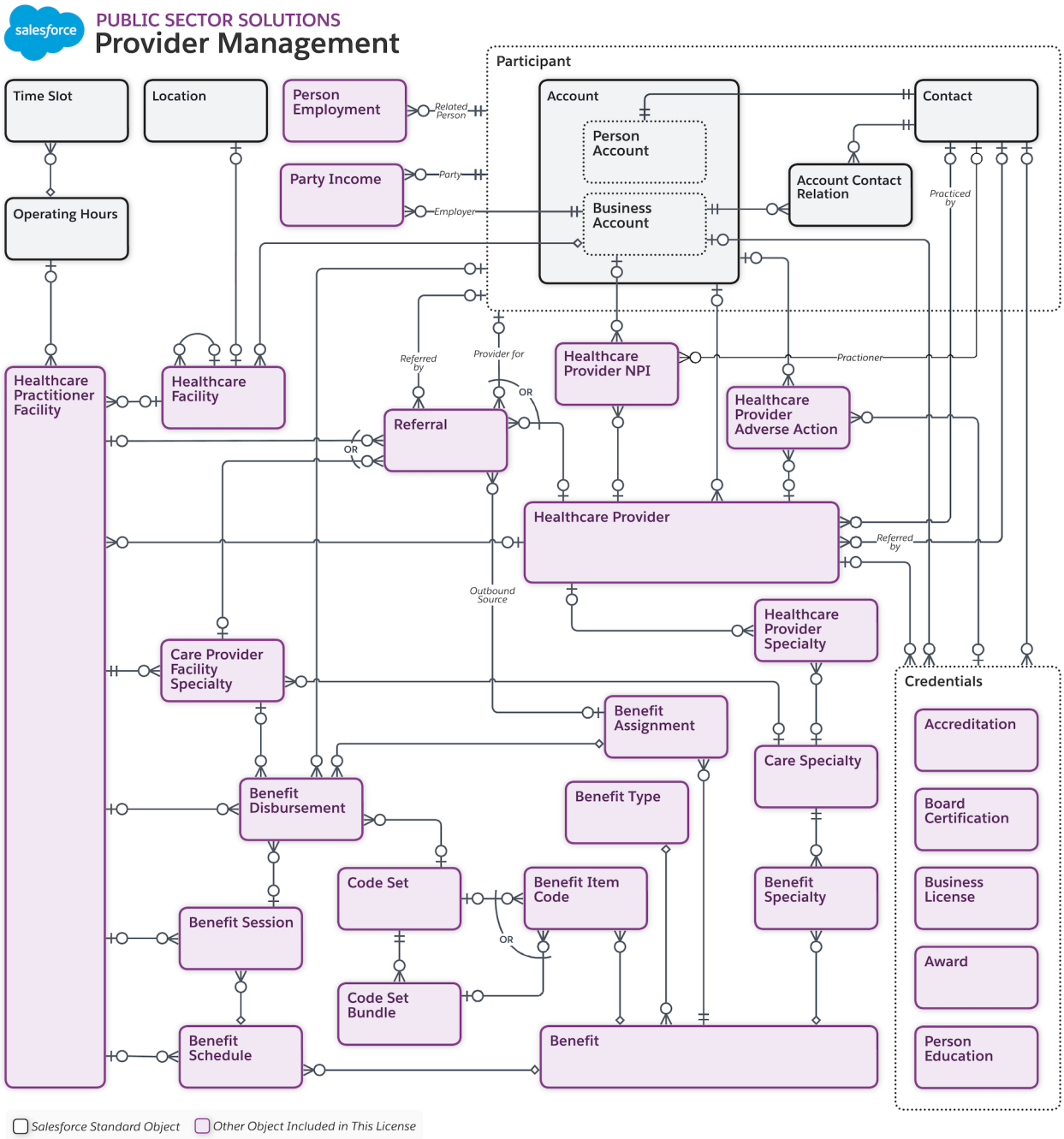
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions



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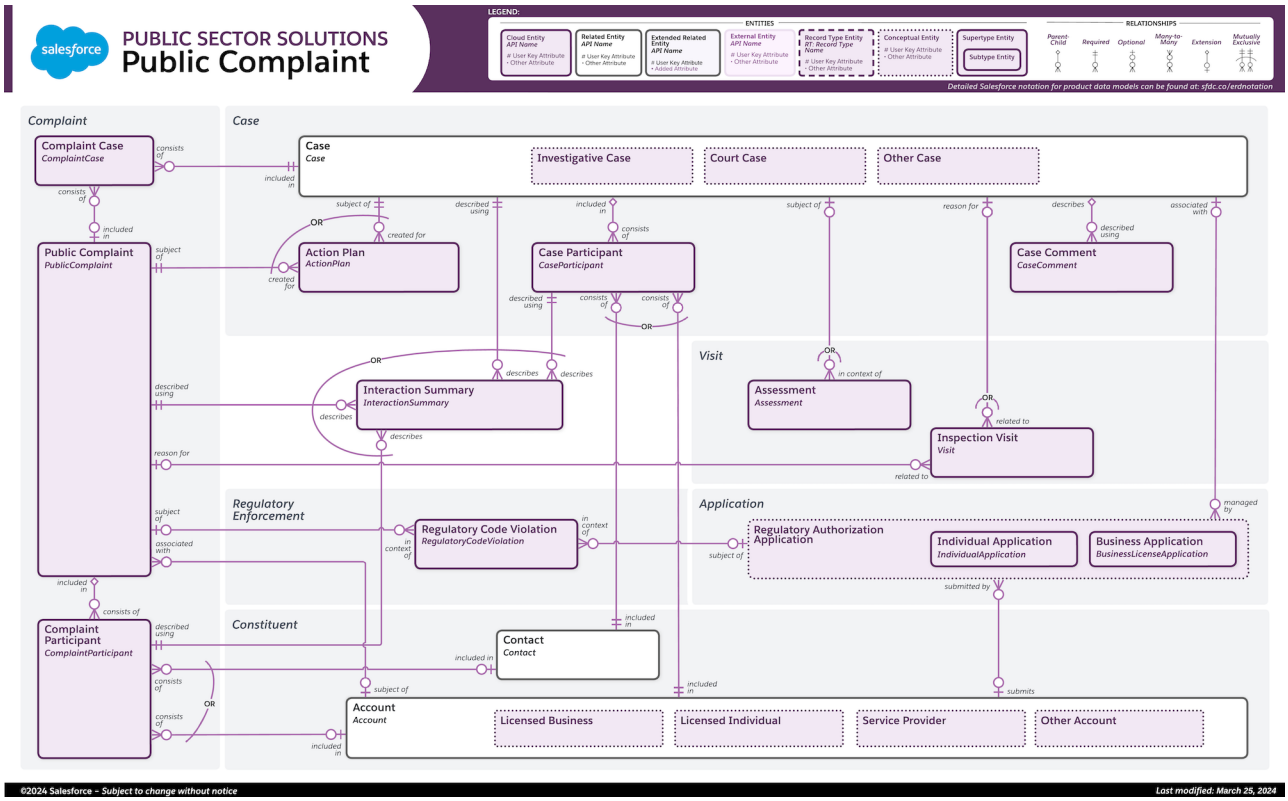
Public Complaint Data Model

Learn about the objects and relationships used for public complaints 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 Public Complaint data model architecture.

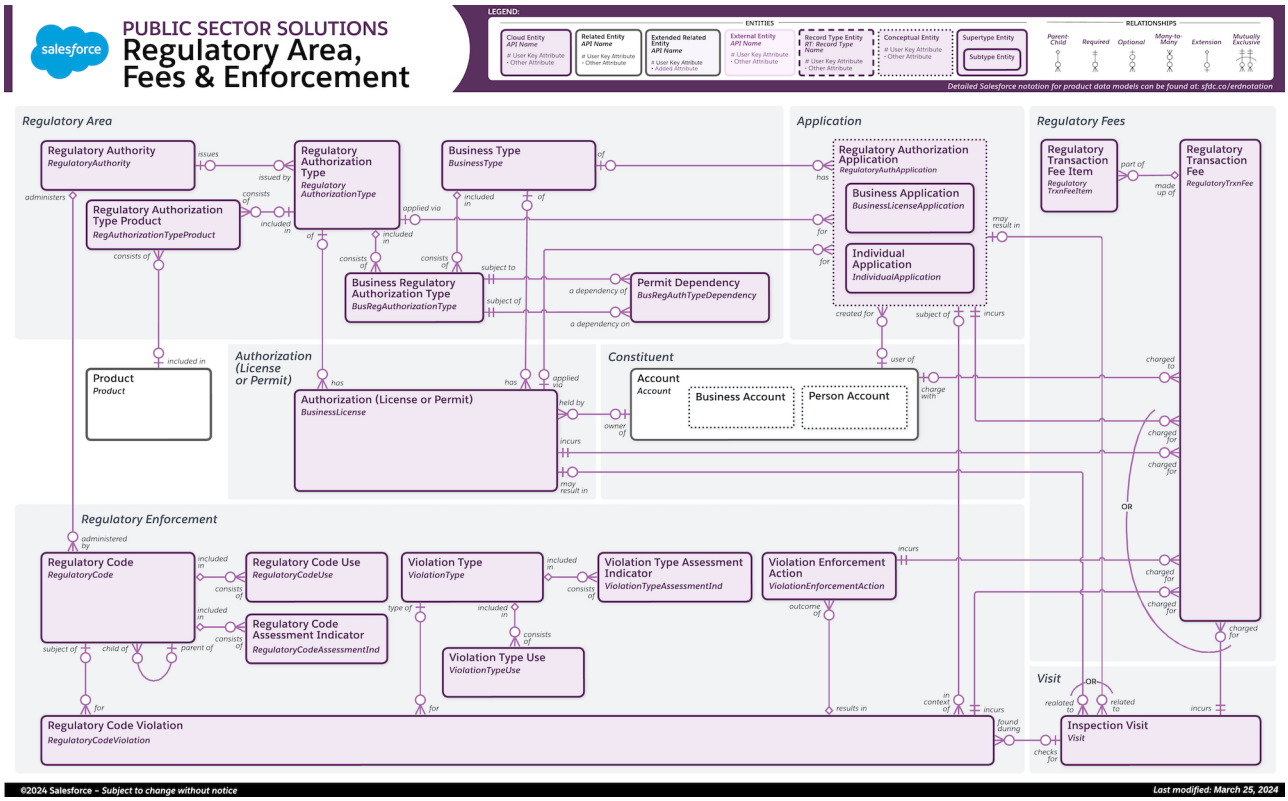
Regulatory Area, Fees, and Enforcement Data Model

Learn about the objects and relationships used for regulatory area, fees, and enforcement 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 Regulatory Area, Fees, & Enforcement data model architecture.

Social Program Management Data Model

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

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Available in: Lightning Experience

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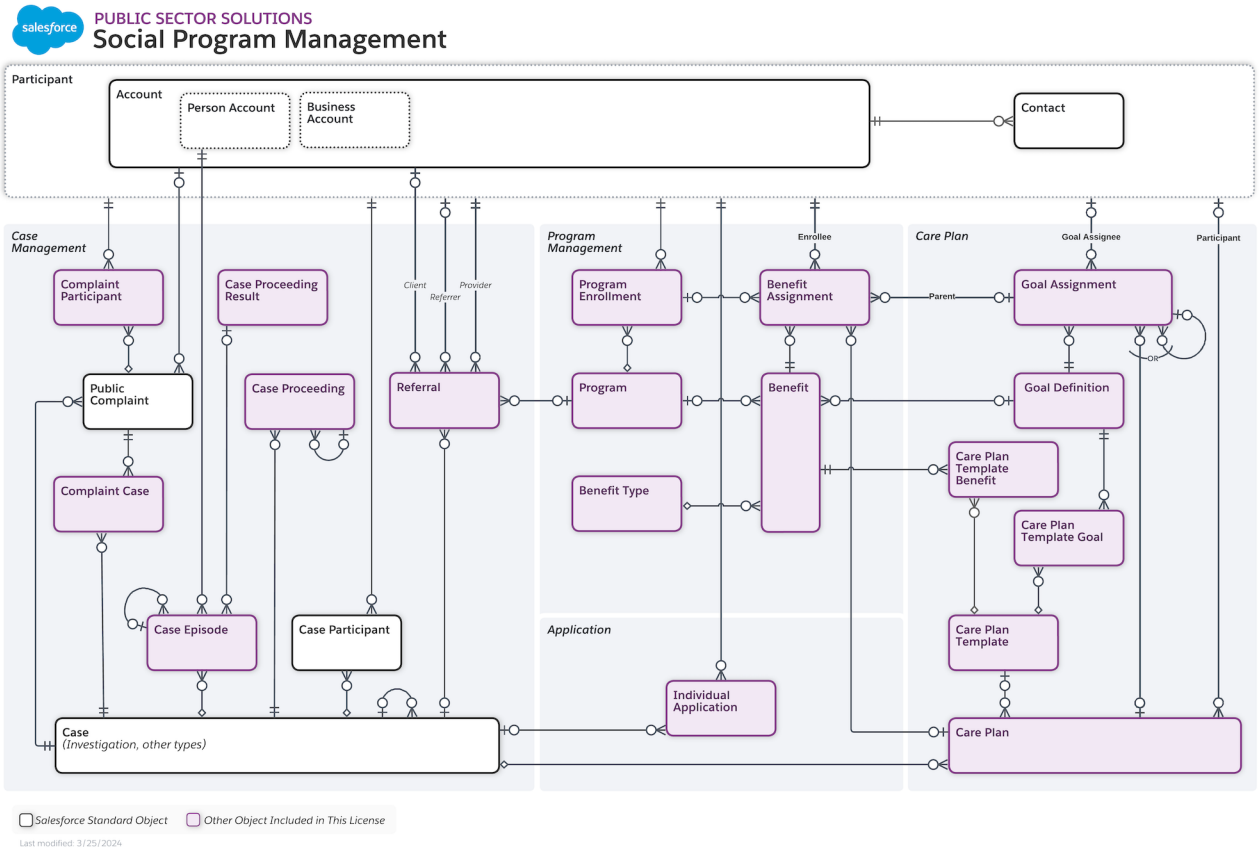


To view a larger version, right-click or Ctrl+click the image and select **Open Image in New Tab** or view the Social Program Management data model architecture.

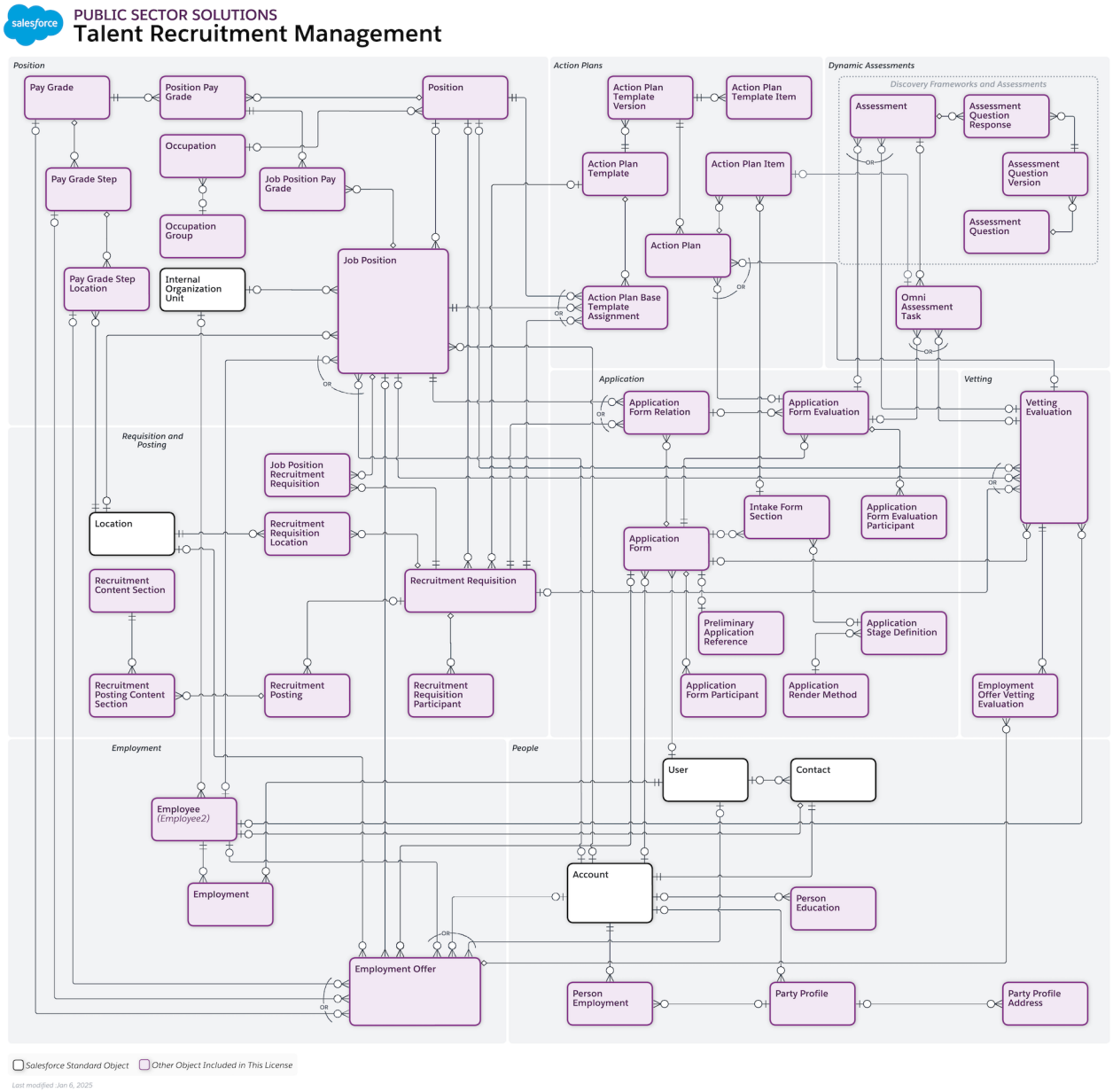
Talent Recruitment Management Data Model

Learn about the objects and relationships used for talent recruitment 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 Talent Recruitment Management data model architecture.

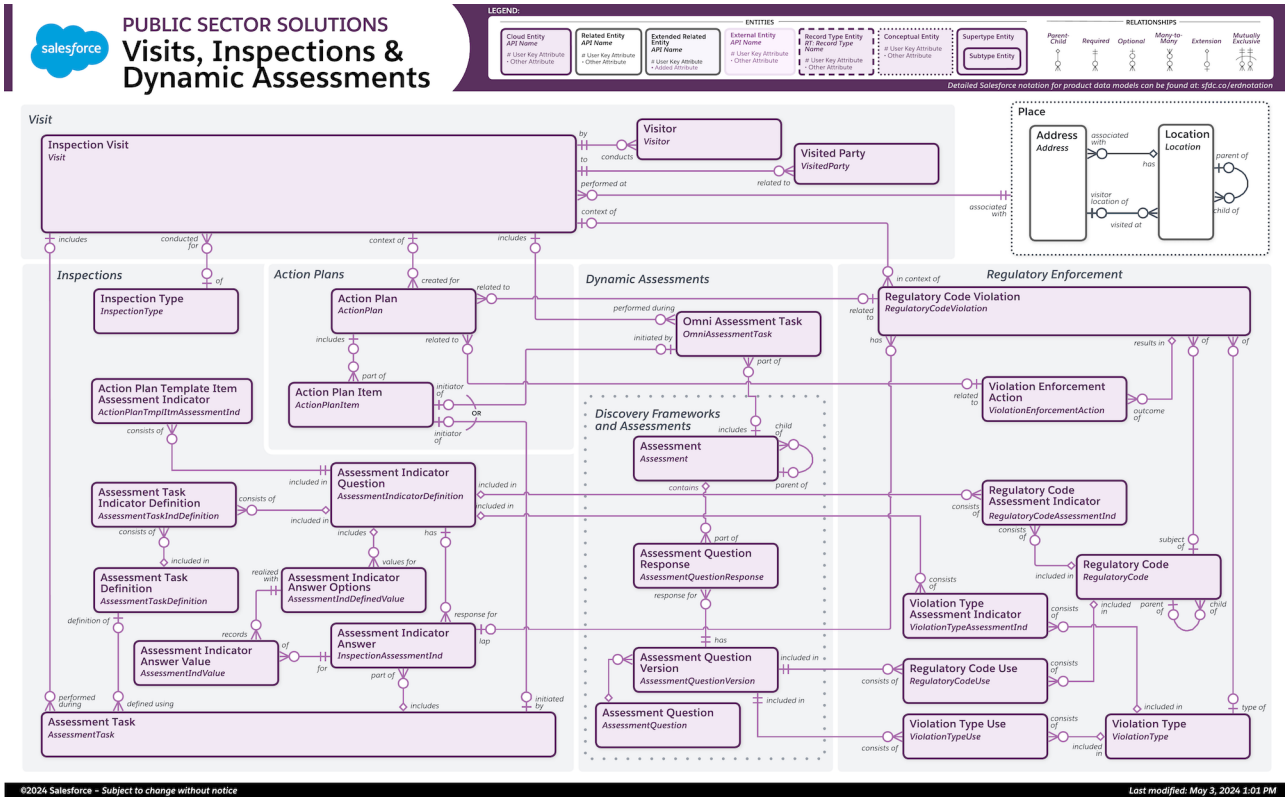
Visits, Inspections, and Dynamic Assessments Data Model

Learn about the objects and relationships used for visits, inspections, and dynamic assessments 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 Court & Visits, Inspections, & Dynamic Assessments data model architecture.

CHAPTER 2 Public Sector Solutions Standard Objects

In this chapter ...

- Accreditation
- ActionPlan
- ActionPlanBaseTemplateAsgn
- ActionPlanItem
- ActionPlanTemplate
- ActionPlanTemplateItem
- ActionPlanTemplateItemValue
- ActionPlanTemplateVersion
- ActionPlanTemplateAssignment
- ActionPlanTmplmAssessmentInd
- ApplicationForm
- ApplicationFormEvaluation
- ApplicationFormEvalPtcp
- ApplicationFormParticipant
- ApplicationFormRelation
- ApplicationDecision
- ApplicationRenderMethod
- ApplicationReview
- ApplicationStageDefinition
- ApplicationTimeline
- AssessmentIndicatorDefinition
- AssessmentIndDefinedValue
- AssessmentIndValue
- AssessmentTask
- AssessmentTaskDefinition
- AssessmentTaskContentDocument
- AssessmentTaskIndDefinition
- AuthApplicationAsset
- AuthApplicationPlace
- AuthLocationAccessSchedule
- Award
- Benefit

The Public Sector Solutions data models provide objects and fields to support licensing and permitting, inspections and assessments, case and program management, benefit management, grantmaking, and other features for your organization. Use the objects to work with these features and transform the delivery of public services.

SEE ALSO:

Salesforce Developer Guide: Public Sector Solutions Data Models

- BenefitAssignment
- BenefitAssignmentAdjustment
- BenefitDisbursement
- BenefitDisbursementAdj
- BenefitItemCode
- BenefitPrvdSearchableFld
- BenefitSchedule
- BenefitScheduleAssignment
- BenefitSession
- BenefitSpecialty
- BenefitType
- BoardCertification
- Budget
- BudgetAllocation
- BudgetCategory
- BudgetCategoryValue
- BudgetParticipant
- BudgetPeriod
- BusinessLicense
- BusinessLicenseApplication
- BusinessMilestone
- BusinessProfile
- BusinessType
- BusRegAuthorizationType
- BusRegAuthTypeDependency
- CareBarrier
- CareBarrierType
- CarePlan
- CarePlanDetail
- CarePlanTemplate
- CarePlanTemplateBenefit
- CarePlanTemplateGoal
- CareProviderAdverseAction
- CareProviderFacilitySpecialty
- CareSpecialty
- CaseEpisode
- CaseParticipant
- CaseProceeding
- CaseProceedingComplaint
- CaseProceedingInfraction
- CaseProceedingParticipant
- CaseProceedingResult

- CaseProgram
- Claim
- ClaimItem
- ClaimParticipant
- CodeSet
- CodeSetBundle
- ComplaintCase
- ComplaintParticipant
- Contact
- ContactProfile
- CourseOffering
- CustodyChainEntry
- CustodyItem
- CustodyItemRelation
- CustodyItemRgltyCodeVio
- DocumentChecklistItem
- Employee2
- Employment
- EmploymentOffer
- EmploymentOfferVettingEval
- Examination
- FundingAward
- FundingAwardAmendment
- FundingAwardParticipant
- FundingAwardRequirement
- FundingAwardRqmtSection
- FundingDisbursement
- FundingOpportunity
- FundingOppParticipant
- GenericVisitTask
- GenericVisitTaskContext
- GoalAssignment
- GoalAssignmentDetail
- GoalDefinition
- GnrcVstKeyPerformanceInd
- GnrcVstTaskContextRelation
- HealthcareFacility
- HealthcarePractitionerFacility
- HealthcareProvider
- HealthcareProviderNpi
- HealthcareProviderSpecialty
- IndividualApplication

- IndividualApplicationTask
- IndividualAppInParticipant
- InspectionAssessmentInd
- InspectionType
- InsurancePolicy
- InsurancePolicyTransaction
- IntakeFormSection
- Interaction
- InteractionAttendee
- InteractionRelatedAccount
- InteractionSumDiscussedAccount
- InteractionSummary
- JobAppInSearchableField
- JobPosition
- JobPositionPayGrade
- JobPostingSearchableField
- JobPstnRecruitmentRqs
- Location
- Occupation
- OccupationGroup
- OmniAssessmentTask
- OmniDataPack
- OmniDataTransform
- OmniDataTransformItem
- OmniESignature
- OmniProcess
- OmniProcessCompilation
- OmniProcessElement
- OmniProcessOmniAsmtTask
- OmniProcessTransientData
- OmniScriptSavedSession
- OmniUiCard
- OperatingHours
- OperatingHoursHoliday
- PartyCertifiedCapacity
- PartyExpense
- PartyFinancialAsset
- PartyIncome
- PartyProfile
- PartyProfileAddress
- PayGrade
- PayGradeStep

- PayGradeStepLocation
- PaymentRequest
- PaymentRequestLine
- PersonDisability
- PersonEducation
- PersonEmployment
- PersonExamination
- PersonLifeEvent
- Polygon
- Position
- PositionPayGrade
- PreliminaryApplicationRef
- Program
- ProgramCohortMember
- ProgramEnrollment
- PublicApplicationParticipant
- PublicComplaint
- RecruitmentContentSection
- RecruitmentPosting
- RecruitmentPostingCntntSect
- RecruitmentRequisition
- RecruitmentRequisitionLoc
- RecruitmentRequisitionPtcp
- RecurrenceSchedule
- ReceivedDocument
- ReceivedDocumentType
- Referral
- RegulatoryAuthority
- RegulatoryAuthorizationType
- RegulatoryCode
- RegulatoryCodeUse
- RegCodeAssessmentInd
- RegulatoryCodeViolation
- RegulatoryTrxnFee
- RegulatoryTrxnFeeItem
- RegAuthorizationTypeProduct
- SignatureTask
- SignatureTaskLineItem
- TagCategory
- TimeSlot
- TrainingCourseParticipant
- TrnCourse

- VettingEvaluation
- ViolationEnforcementAction
- ViolationType
- ViolationTypeUse
- ViolationTypeAssessmentInd
- Visit
- Visitor
- VisitedParty
- VolunteerProject
- WorkerCompCoverageClass

Accreditation

Represents the professional accreditations of a facility. For example, a joint commission accredits a facility as a general acute care hospital.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Healthcare facility (Account) that this accreditation is associated with.
`AccreditationRating`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Rating system used by the accrediting body.
`AccreditingBody`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The organization that provided the accreditation.
`EffectiveFrom`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this accreditation is effective.
`EffectiveTo`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this accreditation is no longer effective.
`HealthcareProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Healthcare provider that this accreditation is associated with. This field is a relationship field. **Relationship Name** HealthcareProvider **Relationship Type** Lookup **Refers To** HealthcareProvider
`LastFullSurveyDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of the last full survey completed by accrediting body.
`LastOnsiteSurveyDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date that accrediting body was last onsite.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the accreditation.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
PractitionerId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Practitioner that this accreditation is associated with.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** System from which the record was sourced.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description ID of the system from which the record was sourced.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Accreditation status.
`SubType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Subtype of the accreditation.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of accreditation.

Associated Objects

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

AccreditationChangeEvent (API version 60.0)
Change events are available for the object.

AccreditationFeed
Feed tracking is available for the object.

AccreditationHistory
History is available for tracked fields of the object.

AccreditationOwnerSharingRule
Sharing rules are available for the object.

AccreditationShare
Sharing is available for the object.

ActionPlan

Represents the instance of an action plan, a set of tasks created from an action plan template. This object is available in API version 44.0 and later.

Supported Calls

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

Fields

Field Name	Details
`ActionPlanState`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The status of work being done for the action plan. Possible values are: • `Canceled` • `Complete` • `In Progress` • `Not Started` The default value is `Not Started`.
`ActionPlanTemplateVersionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the version of the action plan template used to create this action plan. At creation, the referenced action plan template must be in the published state.
`ActionPlanType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort **Description** The action plan's type. Possible values are:

Field Name	Details
	• `Industries` • `Sales`—This value is available in API version 63.0 and later with the Sales Action Plans add-on license and the Sales Action Plans default permission set. • `Service`
`IsLocked`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the action plan is locked or not.
`IsUsingHolidayHours`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort **Description** Indicates whether task completion dates have been calculated by incrementing the task offset for each non-work day, excluding recurring holidays.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nllable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`MayEdit`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort

Field Name	Details
	Description Indicates whether the action plan can be edited or not.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the action plan.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`StartDate`	**Type** date **Properties** Create, Default on create, Filter, Group, Sort **Description** The start date of the action plan.
`TargetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** The ID of the parent object record that relates to this action plan. For API version 63.0 and later, supported parent objects are Account, AccountPlanObjective, Applicant, ApplicationForm, ApplicationFormProduct, Asset, BusinessLicense, BusinessMilestone, Campaign, Case, ChangeRequest, Claim, Contact, Contract, FinancialGoal, Incident, InsurancePolicy, InsurancePolicyCoverage, Lead, Opportunity, PersonLifeEvent, Problem, ResidentialLoanApplication, WorkOrder, and WorkOrderLineItem. For API version 62.0 and later, supported parent objects are ApplicationFormEvaluation and VettingEvaluation. For API version 48.0 and later, supported parent objects are Account, AssetsAndLiabilities, BusinessMilestone, Campaign, Card, Case, Claim, Contact,

Field Name	Details
	Contract, Financial Account, Financial Goal, Financial Holding, InsurancePolicy, InsurancePolicyCoverage, Lead, Opportunity, PersonLifeEvent, ResidentialLoanApplication, and Visit as well as custom objects with activities enabled. For API version 47.0 and later, supported parent objects are Account, BusinessMilestone, Campaign, Case, Claim, Contact, Contract, InsurancePolicy, InsurancePolicyCoverage, Lead, Opportunity, PersonLifeEvent, and Visit as well as custom objects with activities enabled. For API version 46.0 and later, supported parent objects are Account, Campaign, Case, Contact, Contract, Lead, and Opportunity as well as custom objects with activities enabled. For API version 45.0 and earlier, the only supported parent object is Account.

Associated Objects

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

ActionPlanOwnerSharingRule
Sharing rules are available for the object.

ActionPlanShare
Sharing is available for the object.

ActionPlanBaseTemplateAsgn

Represents a junction between an action plan template and a related record. An action plan template can be assigned to a job position, position, or a recruitment requisition. This object is available in API version 62.0 only.

Supported Calls

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

Fields

Field	Details
`ActionPlanTemplateId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the action plan template that's associated with the reference record.

Field	Details
	This field is a relationship field. **Relationship Name** ActionPlanTemplate **Relationship Type** Master-detail **Refers To** ActionPlanTemplate (the master object)
`IsApplicable`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the action plan base template assignment applies to the reference record (true) or not (false). The default value is `false`.
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the action plan base template assignment is required (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the action plan base template assignment.
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the record that's associated with the action plan template. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Refers To** JobPosition, Position, RecruitmentRequisition
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the assignment. Possible values are: • `Active` • `Inactive` The default value is `Active`.
`TemplateDisplayOrder`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The display order of the action plan template within the context of the reference record.

Associated Objects

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

ActionPlanBaseTemplateAsgnHistory on page 835
History is available for tracked fields of the object.

ActionPlanItem

Represents the instance of an action plan item.This object is available in API version 44.0 and later.

Supported Calls

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

Fields

Field Name	Details
`ActionPlanId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the action plan that this item belongs to.
`ActionPlanTemplateItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** The ID of the action plan template item this item was created from.
`IsLocked`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan item is locked or not. The default value is `false`.
`IsRequired`	**Type** boolean

Field Name	Details
	Properties Create, Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan item is required or not.
`ItemEntityType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of object used with the item. This field is available in API version 61.0 and later. Possible values are: • `Document Checklist Item` • `Event`—Available only with sales action plans in API version 63.0 and later with the Sales Action Plans add-on license and the Sales Action Plans default permission set. • `RecordAction` • `Task`
`ItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** The ID of the record created by this action plan item. This field is a polymorphic relationship field. **Relationship Name** Item **Refers To** DocumentChecklistItem, Event, RecordAction, Task
`ItemState`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The action plan item's work state. Possible values are: • `Canceled`

Field Name	Details
	• `Completed` • `Deleted` • `In Progress` • `Pending`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of this action plan item.

ActionPlanTemplate

Represents the instance of an action plan template. This object is available in API version 44.0 and later.

Supported Calls

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

Fields

Field Name	Details
`ActionPlanType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** This action plan template's type. Possible values are: • `Industries` • `Sales`—This value is available in API version 63.0 and later with the Sales Action Plans add-on license and the Sales Action Plans default permission set. • Service
`Category`	**Type** picklist

Field Name	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the category that the action plan template belongs to. Available in API version 64.0 and later. Possible values are: • `Onboarding` • `Application`
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of this action plan template.
`EstimatedCompletionDays`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The estimated number of days to complete the action plan. Available in API version 64.0 and later.
`FileBasedTemplatePath`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The path of the file based template using which the action plan template is created. Available in API version 64.0 and later.
`IsAdHocItemCreationEnabled`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether users can add tasks or other items to generated action plans (`true`) or not (`false`).

Field Name	Details
`IsLocked`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan template is locked or not. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`MayEdit`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan template can be edited or not. The default value is `false`.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of this action plan template.
`OwnerId`	**Type** reference

Field Name	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this action plan template. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`SourceType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the source type to which the action plan template belongs to. Available in API version 64.0 and later. Possible values are: • `CRM` • `MigratedFromSandbox`
`Status`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The status of this action plan template. Possible values are: • `Draft` • `Final—Published` • `Obsolete` • `ReadOnly`
`Subcategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The subcategory to which the action plan template belongs.

Field Name	Details
	Available in API version 64.0 and later. Possible values are: • `Product Onboarding` • `Customer Onboarding`
`TargetEntityType`	**Type** picklist **Properties** Create, Defaulted on create, Group, Restricted picklist, Sort **Description** The parent object this action plan template relates to. Possible values are organized by the API version in which they were introduced. Values are available in all versions after introduction unless noted otherwise. API Version 62.0 and later with Financial Services: • `AccountPlanObjective` • `FinancialDeal` • `PartyProfile` API Version 62.0 and later with Public Sector Solutions: • `ApplicationFormEvaluation` • `VettingEvaluation` API version 60.0 and later with Education Cloud • `ProgramEnrollment` API version 58.0 and later with Health Cloud • `CareBarrier` API version 58.0 and later with Nonprofit Cloud: • `Benefit` • `Program` API Version 58.0 and later with Public Sector Solution and Education Cloud: • `ApplicationDecision` • `ApplicationReview` • `Benefit` • `Program` API Version 56.0 and later with Automotive Cloud: • `Account` • `Asset` • `Asset Account Participant` • `Asset Contact Participant`

Field Name	Details
	• `Asset Milestone` • `Fleet` • `Lead` • `Opportunity` • `Record Alert` • `Vehicle` • `Case` • `Claim` • `Contact` API Version 58.0 and later with Grantmaking: • `ApplicationDecision` • `ApplicationReview` • `Benefit` • `Budget` • `BudgetAllocation` • `CareBarrier` • `FundingAward` • `FundingAwardAmendment` • `FundingAwardRequirement` • `FundingDisbursement` • `FundingOpportunity` • `Program` API Version 52.0 and later: • `BusinessLicenseApplication` • `IndividualApplication` • `PublicComplaint` • `RegulatoryCodeViolation` • `ViolationEnforcementAction` API Version 47.0 and later: • `BusinessMilestone` • `Claim` • `InsurancePolicy` • `InsurancePolicyCoverage` • `PersonLifeEvent` • `Visit` API Version 46.0 and later: • `Campaign`—Unsupported for Grantmaking.

Field Name	Details
	• Case • Contact • Contract • Lead • Opportunity • Custom objects with activities enabled API Version 44.0 and later: Account
UniqueName	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name for this action plan template. This field is unique within your organization.

Associated Objects

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

ActionPlanTemplateOwnerSharingRule
Sharing rules are available for the object.

ActionPlanTemplateShare
Sharing is available for the object.

ActionPlanTemplateItem

Represents the instance of an item on an action plan template version. This object is available in API version 44.0 and later.

Supported Calls

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

Fields

Field Name	Details
ActionPlanTemplateVersionId	**Type** reference

Field Name	Details
	Properties Create, Filter, Group, Sort, **Description** The version of the action plan template this item is for.
`DisplayOrder`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The order in which this item is displayed within the action plan template version.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the task created from this template item is active. The default value is `false`.
`IsLocked`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan template item is locked or not. The default value is `false`.
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the task created from this template item is required. The default value is `false`.
`ItemEntityType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update

Field Name	Details
	Description The type of action plan template item entity.. Possible values are: • `Document Checklist Item` • `Event`—This value is available in API version 63.0. • `RecordAction` • `Task`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`MayEdit`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan template item can be edited or not. The default value is `false`.
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, idLookup, Update **Description** The unique identifier for this action plan template item record.
`UniqueName`	**Type** string

Field Name	Details
	Properties Create, Filter, Group, Sort, Update **Description** The unique name for this action plan template item. This field is unique within your organization.

ActionPlanTemplateItemValue

Represents the value associated with an action plan template item. This object is available in API version 44.0 and later.

Supported Calls

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

Fields

Field Name	Details
`ActionPlanTemplateItemId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the action plan template item that this value relates to. **Relationship Name** ActionPlanTemplateItem **Relationship Type** Master-detail **Refers To** ActionPlanTemplateItem (the master object)
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the task created from this template item is active. The default value is `false`.

Field Name	Details
`IsLocked`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan template item value is locked or not. The default value is `false`.
`ItemEntityFieldName`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The name of the field on the action plan template item that this value is for. Available fields include: • `AssessmentTask.AssignedToId` • `AssessmentTask.AssessmentTaskDefinitionId` • `AssessmentTask.Description` • `AssessmentTask.EndTime` • `AssessmentTask.IsRequired` • `AssessmentTask.Name` • `AssessmentTask.OwnerId` • `AssessmentTask.ParentId` (Visit ID) • `AssessmentTask.ReferenceRecordId` • `AssessmentTask.SequenceNumber` • `AssessmentTask.StartTime` • `AssessmentTask.Status` • `AssessmentTask.TaskDefinitionId` • `AssessmentTask.TaskType` • `DocumentChecklistItem.DocumentTypeId` • `DocumentChecklistItem.Instruction` • `DocumentChecklistItem.IsAccepted` • `DocumentChecklistItem.IsFrozen` • `DocumentChecklistItem.IsRequired` • `DocumentChecklistItem.Name` • `DocumentChecklistItem.OwnerId` • `DocumentChecklistItem.ParentRecordId` • `DocumentChecklistItem.Status` • `DocumentChecklistItem.WhoId`

Field Name	Details
	• `Event` • `Event.ActivityDate` • `Event.ActivityDateTime` • `Event.Description` • `Event.DurationInMinutes` • `Event.EndDateTime` • `Event.EventSubtype` • `Event.IsAllDayEvent` • `Event.IsPrivate` • `Event.IsRecurrence` • `Event.IsReminderSet` • `Event.IsVisibleInSelfService` • `Event.Location` • `Event.OwnerId` • `Event.Recurrence2PatternText` • `Event.RecurrenceDayOfWeekMask` • `Event.RecurrenceDayOfMonth` • `Event.RecurrenceEndDateOnly` • `Event.RecurrenceInterval` • `Event.RecurrenceInstance` • `Event.RecurrenceMonthOfYear` • `Event.RecurrenceStartDateTime` • `Event.RecurrenceTimeZoneSidKey` • `Event.RecurrenceType` • `Event.ReminderDateTime` • `Event.StartDateTime` • `Event.ShowAs` • `Event.Subject` • `Event.Type` • `Event.WhatId` • `Event.WhoId` • `IndividualApplicationTask.Description` This value is available in API version 62.0 and later. • `IndividualApplicationTask.IsSubmitted` • `IndividualApplicationTask.Name` • `IndividualApplicationTask.SavedApplicationUrl` • `OtherComponentTask.ParticipantRoleId` • `RecordAction.ActionDefinition`

Field Name	Details
	• `RecordAction.ActionType` • `RecordAction.FlowDefinition` (Interaction Definition ID) • `RecordAction.FlowInterviewId` • `RecordAction.IsMandatory` • `RecordAction.IsUiRemoveHidden` (Hide Remove Action in UI) • `RecordAction.Order` • `RecordAction.Pinned` • `RecordAction.ParticipantRoleId` • `RecordAction.RecordId`(Parent Record ID) • `RecordAction.Status` • `Task.ActivityDate` (Due Date Only) • `Task.CallDisposition` • `Task.CallDurationInSeconds` • `Task.CallObject` • `Task.CallType` • `Task.Description` • `Task.IsRecurrence` • `Task.IsReminderSet` • `Task.OwnerId` (Assigned To ID) • `Task.Priority` • `Task.RecurrenceDayOfMonth` • `Task.RecurrenceDayOfWeekMask` • `Task.RecurrenceEndDateOnly` • `Task.RecurrenceInstance` • `Task.RecurrenceInterval` • `Task.RecurrenceMonthOfYear` • `Task.RecurrenceRegeneratedType` • `Task.RecurrenceStartDateOnly` • `Task.RecurrenceTimeZoneSidKey` • `Task.RecurrenceType` • `Task.ReminderDateTime` • `Task.Status` • `Task.Subject` • `Task.TaskSubtype` • `Task.WhatId` (Related To ID) • `Task.WhoId`

Field Name	Details
`ItemEntityType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of action plan template item. Possible values are: • `Document Checklist Item` • `Event`—Available in API version 63.0 and later with the Sales Action Plans add-on license and the Sales Action Plans default permission set. • `RecordAction` • `Task`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`MayEdit`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan template item value can be edited or not. The default value is `false`.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field Name	Details
	Description The unique identifier for this record.
`ValueFormula`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A formula used to calculate the value for this action plan template item.
`ValueLiteral`	**Type** textarea **Properties** Create, Filter, Nillable, Update **Description** The value for this action plan template item.

ActionPlanTemplateVersion

Represents the version of an action plan template. This object is available in API version 44.0 and later.

Supported Calls

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

Fields

Field Name	Details
`ActionPlanTemplateId`	**Type** reference **Properties** Create, Filter, Group, Sort, Filter, Group, Sort **Description** The ID of the action plan template this version represents.
`ActivationDateTime`	**Type** dateTime

Field Name	Details
	Properties Create, Filter, Nillable, Sort, **Description** The date and time at which this version became active.
`InactivationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort **Description** The date and time at which this version became inactive.
`IsLocked`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether this action plan template version is locked or not. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort, , Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`MayEdit`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort

Field Name	Details
	Description Indicates whether this action plan template version can be edited. The default value is `false`.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update, **Description** The name of this version item.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The action plan template version's state. Possible values are: • `Draft` • `Final - Published` • `Obsolete` • `ReadOnly`
`Version`	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Sort **Description** The index number of this action plan template version.

ActionPlanTemplateAssignment

Represents a junction between an action plant template's version and the target object associated with them. 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
`ActionPlanTemplateVersionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. The ActionPlanTemplateVersion associated with the TargetObject. This field is a relationship field. **Relationship Name** ActionPlanTemplateVersion **Relationship Type** Lookup **Refers To** ActionPlanTemplateVersion
`AssociatedObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. Represents the relation between an object associated with the action plan template version record. This field is a polymorphic relationship field. **Relationship Name** AssociatedObject **Relationship Type** Lookup **Refers To** Benefit, CarePlanTemplate, GoalDefinition, JobPosition, Position, Program, RecruitmentRequisition, RegulatoryCode
`IsApplicable`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the action plan template assignment applies to the reference record (true) or not (false). The default value is `false`. Available in API version 63.0 and later. Talent Recruitment Management must be enabled.

Field	Details
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the action plan template assignment is required (true) or not (false). The default value is `false`. Available in API version 63.0 and later. Talent Recruitment Management must be enabled.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The unique ID of the Action Plan Template Assignment.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the action plan template assignment. Possible values are: • `Active` • `Inactive` The default value is `Active`.

Field	Details
	Available in API version 63.0 and later. Talent Recruitment Management must be enabled.
`TemplateDisplayOrder`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The display order of the action plan template within the context of the reference record. Available in API version 63.0 and later. Talent Recruitment Management must be enabled.

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.

ActionPlanTemplateAssignmentFeed **on page 826**
Feed tracking is available for the object.

ActionPlanTemplateAssignmentHistory **on page 835**
History is available for tracked fields of the object.

ActionPlanTmplItmAssessmentInd

Represents the action plan template items and the assessment indicator definitions associated with them.

Supported Calls

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

Fields

Field	Details
`ActionPlanTemplateItemId`	**Type** reference **Properties** Filter, Group, Sort **Description** The action plan template item that is associated with the assessment indicator definition. This field is a relationship field. **Relationship Name** ActionPlanTemplateItem

Field	Details
	Relationship Type Master-detail **Refers To** ActionPlanTemplateItem (the detail object)
AssessmentIndDefinitionId	**Type** reference **Properties** Filter, Group, Sort **Description** The assessment indicator definition that is associated with the action plan template item. This field is a relationship field. **Relationship Name** AssessmentIndDefinition **Relationship Type** Master-detail **Refers To** AssessmentIndicatorDefinition (the master object)
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the action plan template item assessment indicator definition.

ApplicationForm

Represents the high level information of a submitted application. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that's associated with the application. This field is a relationship field. **Relationship Name** Account **Refers To** Account
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`LeadId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the lead associated with the application. This field is a relationship field. **Relationship Name** Lead **Refers To** Lead
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application form.
`OpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the opportunity associated with the application. This field is a relationship field. **Relationship Name** Opportunity **Refers To** Opportunity

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
PreliminaryApplicationRefId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The preliminary application reference that represents the saved application. This field is a relationship field. **Relationship Name** PreliminaryApplicationRef **Refers To** PreliminaryApplicationRef
RecruitmentPostingId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The recruitment posting associated with the application form. This field is a relationship field. Available in API version 63.0 and later. **Relationship Name** RecruitmentPosting **Refers To** RecruitmentPosting
Stage	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The stage in the approval process of the application. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirement.
`SubmissionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application is submitted.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the usage of application. Possible value: • `EmployeeRecruitment`—Talent Recruitment 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.

ApplicationFormChangeEvent on page 837
Change events are available for the object.

ApplicationFormFeed on page 826
Feed tracking is available for the object.

ApplicationFormHistory on page 835
History is available for tracked fields of the object.

ApplicationFormOwnerSharingRule on page 832
Sharing rules are available for the object.

ApplicationFormShare on page 825
Sharing is available for the object.

ApplicationFormEvaluation

Represents the details of the information verification initiated for an object. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The application form that was evaluated. This field is a relationship field. **Relationship Name** ApplicationForm **Refers To** ApplicationForm
`ApplicationFormRelationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Record ID of the application form relation. This field is a relationship field. **Relationship Name** ApplicationFormRelation **Refers To** ApplicationFormRelation
`Comments`	**Type** textarea **Properties** Create, Nillable, Update **Description** The evaluator's comments to the evaluation.
`Date`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the evaluation was performed.
`Decision`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the decision of the evaluation. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization’s requirement.
`EvaluatorId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user or group who evaluated the application form. This field is a relationship field. **Relationship Name** Evaluator

Field	Details
	Refers To User
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application form evaluation record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **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.

ApplicationFormEvaluationChangeEvent on page 837
Change events are available for the object.

ApplicationFormEvaluationFeed on page 826
Feed tracking is available for the object.

ApplicationFormEvaluationHistory on page 835
History is available for tracked fields of the object.

ApplicationFormEvaluationOwnerSharingRule on page 832
Sharing rules are available for the object.

ApplicationFormEvaluationShare on page 825
Sharing is available for the object.

ApplicationFormEvalPtcp

Represents information about a user or group of participants who have access to an application form evaluation. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org and Compliant Data Sharing is enabled for the ApplicationFormEvaluation object. To access the object, you need these permissions.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access AND Configure Compliant Data Sharing OR Use Compliant Data Sharing permission from the Compliant DataSharing permission set license
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`ApplicationFormEvaluationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The application form evaluation associated with the application form evaluation participant record. This field is a relationship field. **Relationship Name** ApplicationFormEvaluation **Relationship Type** Master-detail **Refers To** ApplicationFormEvaluation (the master object)
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the application form evaluation.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the participant's association with the application form evaluation is active (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application form evaluation participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the application form evaluation participant record. This field is a polymorphic relationship field. **Relationship Name** Participant **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant role associated with the application form evaluation participant record. This field is a relationship field. **Relationship Name** ParticipantRole **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.

ApplicationFormEvalPtcpFeed on page 826
Feed tracking is available for the object.

ApplicationFormEvalPtcpHistory on page 835
History is available for tracked fields of the object.

ApplicationFormParticipant

Represents information about a user or group of participants who have access to an application form. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org and Compliant Data Sharing is enabled for the ApplicationForm object. To access the object, you need these permissions.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access AND Configure Compliant Data Sharing OR Use Compliant Data Sharing permission from the Compliant DataSharing permission set license
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The application form associated with the participant. This field is a relationship field. **Relationship Name** ApplicationForm **Relationship Type** Master-detail **Refers To** ApplicationForm (the master object)
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the application form.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application form participant is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the application form participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant that's associated with the application form. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The default access level for a role that a participant can have in the context of a parent record. 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.

ApplicationFormParticipantChangeEvent on page 837
Change events are available for the object.

ApplicationFormParticipantFeed on page 826
Feed tracking is available for the object.

ApplicationFormParticipantHistory on page 835
History is available for tracked fields of the object.

ApplicationFormRelation

Represents the relationship between an application and the context in which it's held. For example, a application form related to recruitment requisition. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`ApplicationFormId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** The ID of application form associated with the application form relation. This field is a relationship field. **Relationship Name** ApplicationForm **Relationship Type** Master-detail **Refers To** ApplicationForm (the master object)
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the application form relation.
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the reference record associated with the application form relation. This field is a polymorphic relationship field.

Field	Details
	Relationship Name ReferenceRecord **Refers To** JobPosition, RecruitmentRequisition

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.

ApplicationFormRelationFeed on page 826
Feed tracking is available for the object.

ApplicationFormRelationHistory on page 835
History is available for tracked fields of the object.

ApplicationDecision

Represents a final decision performed for the specified 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.

Fields

Field	Details
`ApplicationDecision`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the decision for the application. Possible values are: • `Award`

Field	Details
	• Deny
ApplicationId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the application. This field is a polymorphic relationship field. **Relationship Name** Application **Relationship Type** Lookup **Refers To** IndividualApplication
Comment	**Type** textarea **Properties** Create, Nillable, Update **Description** The information about the decision provided on the application.
DecisionAuthorityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user responsible for the application decision. This field is a relationship field. **Relationship Name** DecisionAuthority **Relationship Type** Lookup **Refers To** User
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the preliminary application.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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
`PreliminaryApplicationRefId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the preliminary application reference. This field is a relationship field. **Relationship Name** PreliminaryApplicationRef

Field	Details
	Relationship Type Lookup **Refers To** PreliminaryApplicationRef

ApplicationRenderMethod

Represents how a part of an application can be rendered. 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 Grantmaking license is enabled, Grantmaking is enabled, and the Manage Applications system permission is assigned to users.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the application render method.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** dateTime

Field	Details
	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.
`MethodName`	**Type** textarea **Properties** Create, Nillable, Update **Description** The name of the render method associated with the application.
`MethodRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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
`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

Field	Details
	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. The default is `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.

ApplicationRenderMethodFeed
Feed tracking is available for the object.

ApplicationRenderMethodHistory
History is available for tracked fields of the object.

ApplicationRenderMethodShare
Sharing is available for the object.

ApplicationReview

Represents a review performed against a specified 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.

Fields

Field	Details
`ApplicationCategory`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Specifies the category of the application based on the decision period. Possible values are: • `Basic` • `Special`
`ApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the application. This field is a polymorphic relationship field. **Relationship Name** Application **Relationship Type** Lookup **Refers To** IndividualApplication

Field	Details
`ApplicationRecommendation`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the reviewer's recommended outcome of the application. Possible values are: • `Ask for Revisions` • `Award` • `Deny`
`AssignedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application was assigned to the reviewer.
`AssignedUserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies the user assigned to perform the review. This field is a relationship field. **Relationship Name** AssignedUser **Relationship Type** Lookup **Refers To** User
`Comment`	**Type** textarea **Properties** Create, Nillable, Update **Description** The information about the review provided on the application.
`Condition`	**Type** textarea

Field	Details
	Properties Create, Nillable, Update **Description** The condition that's applicable to an applicant.
`DueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last date by which the application review should be completed.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application review was completed.
IsSubmitted	**Type** 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 59.0 and later. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.

Field	Details
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the application being reviewed.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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
ReviewedById	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of person who reviewed the application. This field is a relationship field. **Relationship Name** ReviewedBy **Relationship Type** Lookup **Refers To** User
StartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application review started.

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the application review. Possible values are: • `Not Started` • `In Progress` • `Completed` • `Cancelled`
`SubmissionDate`	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** The date when the applicant submitted the application.
`Title`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The detailed name of the preliminary application reference.

ApplicationStageDefinition

Represents a stage of an application. 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 Grantmaking license is enabled, Grantmaking is enabled, and the Manage Applications system permission is assigned to users.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the application stage definition.
`EditTypeAppRenderMethodId`	**Type** 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. This field is a relationship field. **Relationship Name** EditTypeAppRenderMethod **Relationship Type** Lookup **Refers To** ApplicationRenderMethod
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the application stage definition.
`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
`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: • `Grantmaking`
`ViewTypeAppRenderMethodId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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

Field	Details
	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.

ApplicationStageDefinitionShare
Sharing is available for the object.

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.

Fields

Field	Details
`ApplicationCloseDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last date when applicants can apply for a grant.

Field	Details
ApplicationOpenDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when applicants can start to apply for a grant.
DecisionReleaseDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the application decision is announced.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the application timeline being reviewed.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner who owns the record.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Type`	**Type** 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`

AssessmentIndicatorDefinition

Define parameters that act as markers of compliance for inspections. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`DataType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** Type of data the assessment Indicator definition can hold. Possible values are: • `Boolean` • `DateTime`

Field	Details
	• Decimal • Number • Percentage • String • Picklist • Multi-Select Picklist
Description	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Description of the assessment indicator definition.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the assessment indicator definition that indicates the parameter to audit.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the assessment Indicator definition record owner.

Associated Objects

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

AssessmentIndicatorDefinitionOwnerSharingRule
Sharing rules are available for the object.

AssessmentIndicatorDefinitionShare
Sharing is available for the object.

AssessmentIndicatorDefinitionFeed **on page 826**
Feed is available for the object.

AssessmentIndDefinedValue

Stores the list of acceptable values which are defined as part of assessment indicator definition for a single and multi select question. 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
`AssessmentIndicatorDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the associated assessment indicator definition.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the record.
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The sequence in which the assessment indicator value is displayed in the UI.
`Value`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Values for the assessment indicator definition.

Associated Objects

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

AssessmentIndValueFeed
Feed is available for the object.

AssessmentIndValue

Stores the list of target or captured values which are defined as part of assessment indicator definition for a single and multi select question. 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
AssessmentIndDefinedValueId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Id of the associated assessment indicator definition value.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the assessment indicator definition value record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this record.
SourceObjectId	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The associated assessment indicator definition.

Associated Objects

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

AssessmentIndValueFeed
Feed is available for the object.

AssessmentTask

Perform tasks in inspections to capture information. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AssessmentTaskDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The assessment task definition that is referenced for the task. This field is available in API version 48.0 and later.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Description of task that has to be performed at the store.
`End Time`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Time when the task was completed by the inspector.
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicate whether a task must be completed to complete a visit. The default value is False. This field is available in API version 48.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Unique identification of the task.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the assessment task record owner.
`ParentId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The visit associated with an assessment task. This field is available in API version 48.0 and later.
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence in which the tasks must be performed. This field is available in API version 48.0 and later.
`Start Time`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Time when the task was started by a inspector.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** View the status of a task. This field is available in API version 48.0 and later. Possible values are: • `Completed` • `InProgress`—In Progress • `NotStarted`—Not Started
`TaskType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** Type of a task that an inspector can perform during the visit.

AssessmentTaskDefinition

Associate an assessment task with an assessment indicator definition. This object is available in API version 48.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Description of the assessment task definition.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Unique identification of the task.
`OwnerId`	**Type** reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the assessment Indicator definition record owner.
`TaskType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Type of a task that the sales rep can perform during the visit.

Associated Objects

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

AssessmentTaskDefinitionOwnerSharingRule
Sharing rules are available for the object.

AssessmentTaskDefinitionShare
Sharing is available for the object.

AssessmentTaskDefinitionFeed
Feed tracking is available for the object.

AssessmentTaskContentDocument

Associate content documents to visits. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AssessmentTaskId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description ID of the assessment task.
ContentContextId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the attachment or file used as the content document for a custom object that is associated with a task. The IDs are validated against ActionPlanTemplateType.
ContentDocumentId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the attachment or file used as the content document.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Unique identifier of the content document.

Associated Objects

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

AssessmentTaskContentDocumentOwnerSharingRule
Sharing rules are available for the object.

AssessmentTaskContentDocumentFeed **on page 826**
Feed is available for the object.

AssessmentTaskIndDefinition

Associate an assessment indicator definition with an assessment task definition.This object is available in API version 48.0 and later.

Supported Calls

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

Fields

Field	Details
`AssessmentIndDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The assessment indicator definition that is associated with the assessment task.
`AssessmentTaskDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The assessment task that is associated with the assessment indicator definition.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Unique identification of the assessment task indicator definition.

Associated Objects

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

AssessmentTaskIndDefinitionFeed
Feed tracking is available for the object.

AuthApplicationAsset

Information related to the association between an Asset and the Application for the license of an Asset. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
AssetId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The associated asset.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the authorization application asset.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the authorization application asset record owner.
RgltyAuthApplicationId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The associated regulatory authorization application.

Associated Objects

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

AuthApplicationAssetFeed **on page 826**

Feed is available for the object.

AuthApplicationAssetHistory on page 835
History is available for the object.

AuthApplicationAssetOwnerSharingRule on page 832
History is available for the object.

AuthApplicationAssetShare on page 825
History is available for the object.

AuthApplicationPlace

Information related to the association between a location and its application for the license of the location. 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
`AuthorizationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the authorization application place association.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.

Field	Details
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the authorization application asset.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the authorization application asset record owner.
PlaceId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the associated place.
RgltyAuthApplicationId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The associated regulatory authorization application.

AuthLocationAccessSchedule

Represents the operating hours during a specified period in which authorization is valid for a place. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
AuthApplPlaceId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The associated authorization and place.
AuthEndDate	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** End date of the authorization period.
AuthStartDate	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** Start date of the authorization period.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description Name of the authorization location access schedule.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the authorization location access schedule record owner.
`WorkDay`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Days during which the authorization is valid.
`WorkEndTime`	**Type** time **Properties** Create, Filter, Nillable, Sort, Update **Description** Time when the authorization ends.
`WorkStartTime`	**Type** time **Properties** Create, Filter, Nillable, Sort, Update **Description** Time when the authorization starts.

Award

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

Supported Calls

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

Fields

Field	Details
AccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the organization receiving the award.
AwardDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date award was received.
AwardedBy	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the issuing organization.
ContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Person who received the award and is listed as a contact.
HealthcareProviderId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Healthcare provider that this award is associated with. This field is a relationship field. **Relationship Name** HealthcareProvider **Relationship Type** Lookup

Field	Details
	Refers To HealthcareProvider
`Identifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Issuing organization's identifier for the award recipient.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Award name.
`OwnerId`	**Type** reference

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

Associated Objects

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

AwardChangeEvent on page 837 (API version 61.0)
Change events are available for the object.

AwardFeed
Feed tracking is available for the object.

AwardHistory
History is available for tracked fields of the object.

AwardOwnerSharingRule
Sharing rules are available for the object.

AwardShare
Sharing is available for the object.

Benefit

Represents the benefits provided by public sector agencies that aim to support citizens and their businesses. This object stores whether the benefit is for financial or service-based organizations.

Supported Calls

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

Fields

Field	Details
`BenefitManagerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person in charge of the benefit. This field is a relationship field. **Relationship Name** BenefitManager **Relationship Type** Lookup **Refers To** User

Field	Details
`BenefitStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the benefit. Possible values are: • `Active` • `Cancelled` • `Completed` • `Planned` The default value is `Active`.
`BenefitTypeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. Specifies the type of the benefit. This field is a relationship field. **Relationship Name** BenefitType **Relationship Type** Lookup **Refers To** BenefitType
`BnftDisbFieldSetApiName`	**Type** 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.
`BudgetAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The budget assigned to the benefit.
CurrentMonthDisbursedQty	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits disbursed in the current month.
CurrentYearAssignedQty	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits assigned in the current year.
CurrentYearDisbursedQty	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits disbursed in the current year.
Description	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the public program benefit.
EndDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date until when the benefit is valid.
EnrollmentCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The number of times the benefit is applicable to an individual.
`GoalDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The goal definition associated with the benefit. This field is a relationship field. **Relationship Name** GoalDefinition **Relationship Type** Lookup **Refers To** GoalDefinition
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Required. Indicates whether the benefit is active. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field	Details
`MaxBenefitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The maximum amount that can be disbursed for a period.
`MinBenefitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The minimum amount that can be disbursed for a period.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the public program benefit.
`PayoutFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the frequency of the benefit payment. Possible values are: • `Annual` • `BiWeekly`—Bi-Weekly • `Monthly` • `Quaterly` • `Weekly`
`PreviousMonthDisbursedQty`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits disbursed in the previous month.

Field	Details
PreviousYearAssignedQty	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits assigned in the previous year.
PreviousYearDisbursedQty	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity of benefits disbursed in the previous year.
ProgramId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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
RecertificationFrequency	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency in days after which an enrolee must recertify eligibility to receive the benefit. Available in API version 58.0 and later.
StartDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date when the benefit starts.
`StartRecertificationFrom`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates when a constituent can recertify for the benefit before the recertification due date. Available in API version 61.0 and later.
`UnitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unit of measure for quantity. This field is a relationship field. **Relationship Name** Unit **Relationship Type** Lookup **Refers To** UnitOfMeasure

Associated Objects

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

BenefitFeed on page 826
Feed tracking is available for the object.

BenefitHistory on page 835
History is available for tracked fields of the object.

BenefitAssignment

Represents the enrollment information of an individual or business that is captured in an application. For example, an individual who is unemployed can raise an application requesting help from the government. If it is approved, the individual is enrolled into the unemployment insurance benefit. This object is available in API version 52.0 and later.

Supported Calls

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

Fields

Field	Details
`ApprovalRejectionReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for rejecting the benefit amount requested by the enrollee.
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the benefit assignment has been approved or not. Possible values are: • `Approved` • `Pending` • `Rejected`
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. Name of the benefit that is associated with the assignment. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup **Refers To** Benefit
`EarningThresholdAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The maximum amount the enrollee can earn for a given period to be eligible for a benefit.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date up to when the assignment is valid.
`EnrolleeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the individual being enrolled for the benefit. This field is a polymorphic relationship field. **Relationship Name** Enrollee **Relationship Type** Lookup **Refers To** Account, Contact
`EnrollmentCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of times the benefit is applicable to an individual.
`EntitlementAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The benefit amount that an enrollee is eligible for.

Field	Details
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`MaximumBenefitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The maximum amount that can be disbursed during an enrollment period.
`MinimumBenefitAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The minimum amount that can be disbursed during an enrollment period.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the benefit assignment.
`NextPayoutDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The due date for the next scheduled benefit payment.
`OwnerId`	**Type** 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. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The parent record associated with the benefit assignment. This field is a polymorphic relationship field. **Relationship Name** ParentRecord **Relationship Type** Lookup **Refers To** BusinessLicenseApplication, CarePlan, Claim, GoalAssignment, IndividualApplication, ProgramEnrollment
`PayoutFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the frequency of the benefit payment. Possible values are: • `Annual`

Field	Details
	• BiWeekly • Monthly • OnDemand • Quaterly • Weekly
Priority	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the priority of the benefit assignment. Possible values are: • High • Low • Medium
ProgramEnrollmentId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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
Quantity	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The benefit quantity allocated to the enrollee.
RecertificationDueDate	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date by when the enrolee must recertify eligibility to continue receiving the benefit. Available in API version 58.0 and later.
`RecertificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the recertification status of the enrollee's eligibility for the benefit assignment. Possible values are: • `InProgress`—Available in API version 61.0 and later. • `Lapsed`—Available in API version 61.0 and later. • `Pending` • `Recertified` Available in API version 60.0 and later.
`ReferenceNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference number used to indicate the enrollee's benefit request.
`RemainingAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The remainder benefit amount that is to be paid to the enrollee.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date from when the assignment begins.

Field	Details
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the benefit assignment. Possible values are: • `Active` • `Completed` • `Enrolled` • `Waitlisted` • `Withdrawn` The default value is `Enrolled`.
`TaskJobStatus`	**Type** 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`
`TaskJobStatusMessage`	**Type** textarea **Properties** Nillable **Description** The message that describes the status of the task in the queue.
`TotalApprovedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total benefit amount approved for an enrollee.

Field	Details
TotalPaidAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total benefit amount that has already been paid to the enrollee.
UnitOfMeasureId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the unit of measurement of the benefit allocated to the enrollee. This field is a relationship field. **Relationship Name** UnitOfMeasure **Relationship Type** Lookup **Refers To** UnitOfMeasure

Associated Objects

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

BenefitAssignmentFeed on page 826
Feed tracking is available for the object.

BenefitAssignmentHistory on page 835
History is available for tracked fields of the object.

BenefitAssignmentOwnerSharingRule on page 832
Sharing rules are available for the object.

BenefitAssignmentShare on page 825
Sharing is available for the object.

BenefitAssignmentAdjustment

Represents a monetary or non-monetary benefit adjustment made to an enrollee that can be disbursed in various frequencies. 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
`AdjustmentType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. Specifies the type of adjustment made to the benefit assignment. Possible values are: • `Payable` • `Recoverable`
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Required. Specifies the approval status of the benefit adjustment. Possible values are: • `Approved` • `Pending` • `Rejected`
`BenefitAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. The benefit assignment associated with this benefit adjustment. This field is a relationship field. **Relationship Name** BenefitAssignment **Relationship Type** Lookup

Field	Details
	Refers To BenefitAssignment
`Comment`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description about the benefit adjustment.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the benefit assignment adjustment.
`ProcessingStatus`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. Specifies the processing status of the benefit adjustment. Possible values are: • `Active`

Field	Details
	• Cancelled • Complete • On_Hold • Pending • Processing
Reason	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Required. The reason for making an adjustment to a benefit assignment.
RecurringAmount	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Required. The benefit adjustment amount that must be paid to the enrollee or the recipient at regular intervals.
ReferenceRecordId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The case or participant associated with the benefit assignment. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Relationship Type** Lookup **Refers To** Case, CaseParticipant
StartDate	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Required. The start date and time of the benefit adjustment period.

Field	Details
TotalAdjustmentAmount	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Required. The total benefit adjustment amount that must be paid to the enrollee or the recipient.

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.

BenefitAssignmentAdjustmentFeed on page 826
Feed tracking is available for the object.

BenefitAssignmentAdjustmentHistory on page 835
History is available for tracked fields of the object.

BenefitAssignmentAdjustmentOwnerSharingRule on page 832
Sharing rules are available for the object.

BenefitAssignmentAdjustmentShare on page 825
Sharing is available for the object.

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 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 if Program and Benefit Management or Benefit Disbursement is enabled in your org.

Fields

Field	Details
ActualCompletionDate	**Type** dateTime

Field	Details
	Properties Create, Filter, Sort, Update **Description** Required. The date when the benefit disbursement was completed.
`AdjustmentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount that's adjusted in the benefit disbursement.
`ApprovalStatus`	**Type** 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`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. The benefit assignment that's associated with the disbursement. This field is a relationship field. **Relationship Name** BenefitAssignment **Relationship Type** Lookup **Refers To** BenefitAssignment

Field	Details
`BenefitCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category of the benefit that's allocated to the enrollee or the recipient. Possible values are: • `Goods` • `Monetary` • `Services`
`BenefitSessionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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
`CodeSetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code set associated with the benefit disbursement record. This field is a relationship field. Available in API version 59.0 and later. **Relationship Name** CodeSet **Relationship Type** Lookup **Refers To** CodeSet

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A description about the benefit that is disbursed. This field is accessible if you enabled Data Protection and Privacy in Setup.
`DisbursedQuantity`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The quantity of the benefit that's disbursed. This field is accessible if you enabled Data Protection and Privacy in Setup.
`DisbursementStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date of the benefit period in every payment cycle.
`EntitlementAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The benefit amount that an enrollee is eligible for.
`ExternalPaymentReference`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the payment on an external system.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the benefit disbursement.
`PaymentStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the disbursement payment. Possible values are: • `Completed`

Field	Details
	• `Failed` • `Not Applicable` • `Pending` • `Processing`
`PayoutAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The payout amount after adjustment that's to be paid to the enrollee or the recipient.
`PractitionerFacilityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The practitioner facility associated with the benefit session record. This field is a relationship field. Available in API version 59.0 and later. **Relationship Name** PractitionerFacility **Relationship Type** Lookup **Refers To** HealthcarePractitionerFacility
`ProgramEnrollmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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. **Relationship Name** ProgramEnrollment **Relationship Type** Lookup **Refers To** ProgramEnrollment

Field	Details
ProviderFacilitySpecialtyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The care specialty to be provided to the enrollee or the recipient at a particular care provider facility. This field is a relationship field. **Relationship Name** ProviderFacilitySpecialty **Relationship Type** Lookup **Refers To** CareProviderFacilitySpecialty
RecipientCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The count of recipients who received the benefit. This field is accessible if you enabled Data Protection and Privacy in Setup.
RecipientId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Required. The participant who receives a benefit. This field is a polymorphic relationship field. **Relationship Name** Recipient **Relationship Type** Lookup **Refers To** Account, Contact
RecipientType	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the recipient type of the benefit that's disbursed. Possible values are: • `Anonymous` • `ProgramEnrollment` • `Walk-in` The default value is `ProgramEnrollment`. This field is accessible if you enabled Data Protection and Privacy in Setup.
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date of the benefit period in every payment cycle.
`UnitOfMeasureId`	**Type** 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 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

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.

BenefitDisbursementFeed on page 826
Feed tracking is available for the object.

BenefitDisbursementHistory on page 835
History is available for tracked fields of the object.

BenefitDisbursementOwnerSharingRule on page 832
Sharing rules are available for the object.

BenefitDisbursementShare on page 825
Sharing is available for the object.

BenefitDisbursementAdj

Represents the changes of an enrollee's benefit that can be made as monetary or non-monetary with similar units of measure. 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
`AdjustmentAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Required. The amount that's adjusted in the benefit disbursement.
`AdjustmentReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for the adjustment in the disbursement amount.
`BenefitAssignmentAdjustmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The benefit assignment adjustment associated with this disbursement. This field is a relationship field. **Relationship Name** BenefitAssignmentAdjustment

Field	Details
	Relationship Type Lookup **Refers To** BenefitAssignmentAdjustment
`BenefitDisbursementId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. The benefit disbursement associated with this adjustment. This field is a relationship field. **Relationship Name** BenefitDisbursement **Relationship Type** Lookup **Refers To** BenefitDisbursement
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the benefit disbursement adjustment.

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.

BenefitDisbursementAdjFeed on page 826
Feed tracking is available for the object.

BenefitDisbursementAdjHistory on page 835
History is available for tracked fields of the object.

BenefitDisbursementAdjOwnerSharingRule on page 832
Sharing rules are available for the object.

BenefitDisbursementAdjShare on page 825
Sharing is available for the object.

BenefitItemCode

Represents information about a code set or a code set bundle that identifies an item that is associated with a benefit. 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 Provider Management is enabled in your org.

Fields

Field	Details
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the benefit record associated with the benefit code set bundle. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup

Field	Details
	Refers To Benefit
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the benefit code set bundle is active (`true`) or not (`false`). The default value is `false`.
`ItemCodeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the code set or code set bundle record associated with the benefit item code. This field is a polymorphic relationship field. **Relationship Name** ItemCode **Relationship Type** Lookup **Refers To** CodeSet, CodeSetBundle
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the benefit code set bundle.

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.

BenefitItemCodeFeed on page 826
Feed tracking is available for the object.

BenefitItemCodeHistory on page 835
History is available for tracked fields of the object.

BenefitPrvdSearchableFld

Represents a collection of denormalized data from certain fields in the Provider Management data model. Provider search queries this object instead of multiple objects, which improves search performance. 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 Provider Management, Benefit Management, and Criteria-Based Search and Filter are enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

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

Field	Details
	Description The benefit associated with the provider. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProviderSpecialty.Specialty.BenefitSpecialty.Benefit.Id`. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup **Refers To** Benefit
`BenefitName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the benefit associated with the provider. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `Benefit.Name`.
`BenefitTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The benefit type associated with the provider. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProviderSpecialty.Specialty.BenefitSpecialty.Benefit.BenefitType.Id`. This field is a relationship field. **Relationship Name** BenefitType **Relationship Type** Lookup **Refers To** BenefitType
`BenefitTypeName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name of the benefit type associated with the provider. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `BenefitType.Type`.
`FacilityAddress`	**Type** location **Properties** Nillable **Description** The address of the service provider facility. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareFacility.Account.ShippingAddress`.
`FacilityAddressLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with facility address longitude to specify the precise geolocation of the service provider facility. Acceptable values are numbers between –90 and 90 with up to 14 decimal places. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareFacility.Account.ShippingLatitude`.
`FacilityAddressLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with facility address latitude to specify the precise geolocation of the service provider facility. Acceptable values are numbers between –90 and 90 with up to 14 decimal places. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareFacility.Account.ShippingLongitude`.
`FacilityGeoLocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The geolocation ID of the facility. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareFacility.Location`. This field is a relationship field. **Relationship Name** FacilityGeoLocation **Relationship Type** Lookup **Refers To** Location
`FacilityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The facility ID associated with the practitioner. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProvider.HealthcarePractitionerFacility.Id`. This field is a relationship field. **Relationship Name** Facility **Relationship Type** Lookup **Refers To** HealthcarePractitionerFacility
`FacilityName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the facility where the service is being provided. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareFacility.Name`.
`FacilityPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The primary phone number of the facility. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareFacility.Account.Phone`.
`GenderRestriction`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The gender preference specified by the physician for their patients. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcarePractitionerFacility.GenderRestriction`.
`HighestAgeServed`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The highest age of patients that the practitioner sees at the facility.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`LicenseJurisdictionCountry`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description The country where the license of the provider is registered. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProvider.BusinessLicense.JurisdictionCountry`.
`LicenseJurisdictionRegion`	**Type** textarea **Properties** Create, Nillable, Update **Description** The region where the license of the provider is registered. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProvider.BusinessLicense.JurisdictionOther`.
`LicenseJurisdictionState`	**Type** textarea **Properties** Create, Nillable, Update **Description** The state where the license of the provider is registered. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProvider.BusinessLicense.JurisdictionState`.
`LicenseName`	**Type** textarea **Properties** Create, Nillable, Update **Description** The name of the license given to the provider. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProvider.BusinessLicense.Name`.
`LicenseStatus`	**Type** textarea **Properties** Create, Nillable, Update **Description** The status of the license given to the provider. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProvider.BusinessLicense.Status`.

Field	Details
`LowestAgeServed`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lowest age of patients that the practitioner sees at the facility. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcarePractitionerFacility.LowestValidAge`.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of this benefit provider searchable field record.
`NationalProviderIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier for a provider from the National Plan and Provider Enumeration System. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProvider.HealthcareProviderNpi.Npi`.
`OperatingDaysList`	**Type** textarea **Properties** Create, Nillable, Update **Description** The list of days when the practitioner is available at the facility. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `OperatingHours.TimeSlot.DayOfWeek`.
`OperatingHoursId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies a set of operating hours for the practitioner at a facility.

Field	Details
	The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HeathcarePractitionerFacility.OperatingHoursId`. This field is a relationship field. **Relationship Name** OperatingHours **Relationship Type** Lookup **Refers To** OperatingHours
`OperatingTimeSlotList`	**Type** textarea **Properties** Create, Nillable, Update **Description** The list of time slots when the practitioner is available at the facility on the operating days of the week.
`OwnerId`	**Type** 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. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PractitionerCertificationType`	**Type** textarea **Properties** Create, Nillable, Update **Description** The type of certification obtained by the practitioner. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthCareProvider.BoardCertification.CertificationType`.

Field	Details
`ProviderEducationLevel`	**Type** textarea **Properties** Create, Nillable, Update **Description** The education level of a person in a provider role. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthCareProvider.PersonEducation.EducationLevel`.
`ProviderGender`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The gender of the provider. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthCareProvider.Contact.Gender` or `HealthCareProvider.Account.PersonGenderIdentity`.
`ProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The provider or practitioner facility. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthCareProvider.Id`. This field is a relationship field. **Relationship Name** Provider **Relationship Type** Lookup **Refers To** HealthcareProvider
`ProviderName`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Name of the provider.

Field	Details
	The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthCareProvider.Name`.
`ProviderPhotoUrl`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The URL for the photograph of the provider or practitioner. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareFacility.Account.PhotoUrl` or `HealthcareProvider.Practitioner.PhotoUrl`.
`ProviderSpeciality`	**Type** textarea **Properties** Create, Nillable, Update **Description** Specialty of the provider. Available in API version 59.0 only. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthcareProviderSpecialty.Specialty.SpecialtyType`.
`ProviderType`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the provider or facility. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `HealthCareProvider.ProviderType`.
`SpecialtyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A specialty offered at the provider facility that's associated with the benefit provider searchable field. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `CareSpecialty.Id`. Available in API version 60.0 and later.

Field	Details
	This field is a relationship field. **Relationship Name** Specialty **Relationship Type** Lookup **Refers To** CareSpecialty
`SpecialtyName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the specialty offered at the provider facility that's associated with the benefit provider searchable field. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records maps this field to `CareSpecialty.Name`. Available in API version 60.0 and later.
`UniqueKey`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** A unique identifier for the benefit provider searchable field record. The Data Processing Engine definition Upsert Benefit Provider Searchable Field Records concatenates `ProviderId`, `FacilityId`, and `BenefitId` to generate the key.

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.

BenefitPrvdSearchableFldFeed on page 826
Feed tracking is available for the object.

BenefitPrvdSearchableFldHistory on page 835
History is available for tracked fields of the object.

BenefitPrvdSearchableFldOwnerSharingRule on page 832
Sharing rules are available for the object.

BenefitPrvdSearchableFldShare on page 825
Sharing is available for the object.

BenefitSchedule

Represents information about the plan for delivering the benefit. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status of the benefit schedule. Available in API version 61.0 and later. Possible values are: • `Approved` • `In Review` • `Not Applicable` • `Pending` • `Rejected`
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The identifier of the benefit that's associated with the schedule. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup **Refers To** Benefit
`DefaultBenefitQuantity`	**Type** double

Field	Details
	Properties Create, Filter, Sort, Update **Description** The default quantity of benefit that's provided within a session of benefit schedule.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the benefit schedule.
`FirstSessionEndDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the first session ends in the benefit schedule.
`FirstSessionStartDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the first session begins in the benefit schedule.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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
MaximumParticipantCount	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The maximum number of participants in a session.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the benefit schedule.
OwnerId	**Type** 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. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
PractitionerFacilityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The practitioner facility associated with the benefit session record. Available in API version 59.0 and later. This field is a relationship field. **Relationship Name** PractitionerFacility **Relationship Type** Lookup

Field	Details
	Refers To HealthcarePractitionerFacility

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 on page 826
Feed tracking is available for the object.

BenefitScheduleHistory on page 835
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

Fields

Field	Details
`BenefitAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The benefit assignment associated with the benefit schedule. This field is a relationship field. **Relationship Name** BenefitAssignment

Field	Details
	Relationship Type Lookup **Refers To** BenefitAssignment
`BenefitScheduleId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** 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`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the participant's assignment to the benefit schedule.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the benefit schedule assignment.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** 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 58.0 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.

Fields

Field	Details
`BenefitScheduleId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The identifier of the benefit schedule that's associated with the benefit session. This field is a relationship field. **Relationship Name** BenefitSchedule

Field	Details
	Relationship Type Lookup **Refers To** BenefitSchedule
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The end date and time of the benefit session.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the benefit session.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PractitionerFacilityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The practitioner facility associated with the benefit session record. Available in API version 59.0 and later. This field is a relationship field. **Relationship Name** PractitionerFacility **Relationship Type** Lookup **Refers To** HealthcarePractitionerFacility
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The start date and time of the benefit session.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The status of the benefit session. Possible values are: • `Cancelled` • `Completed` • `Postponed`

Field	Details
	• `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 on page 826
Feed tracking is available for the object.

BenefitSessionHistory on page 835
History is available for tracked fields of the object.

BenefitSpecialty

Represents a junction between a benefit and a care specialty. The object maps the benefits provided to constituents with the specialties offered by the network of service providers. 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 Provider Management is enabled in your org.

Fields

Field	Details
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The benefit associated with the benefit specialty record. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup

Field	Details
	Refers To Benefit
`CareSpecialtyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The care specialty associated with the benefit specialty record. This field is a relationship field. **Relationship Name** CareSpecialty **Relationship Type** Lookup **Refers To** CareSpecialty
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the benefit specialty.

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.

BenefitSpecialtyFeed **on page 826**
Feed tracking is available for the object.

BenefitSpecialtyHistory **on page 835**
History is available for tracked fields of the object.

BenefitType

Represents information about the type of benefits that can be applied to an individual or a group.

Supported Calls

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

Fields

Field	Details
Category	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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.
Description	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The description of benefit type.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the benefit type.
`OwnerId`	**Type** 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. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
`ProcessType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. The process type associated with the benefit type. Set to `PublicSector`.
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of benefit being offered. Possible values are: • `Goods` • `Monetary` • `Service` The default value is `Service`.
`UnitofMeasureId`	**Type** 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

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.

BenefitTypeOwnerSharingRule on page 832
Sharing rules are available for the object.

BenefitTypeShare on page 825
Sharing is available for the object.

BoardCertification

Represents the practitioner's board certifications such as being board-certified in cardiology and cardiovascular disease.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account that this healthcare provider is associated with.
`BoardName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the organization providing the board certification.
`CertificationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of certification.
`CurrentCertificationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date of most recent board certification.

Field	Details
EffectiveFrom	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this certification is effective.
EffectiveTo	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this certification is no longer effective.
ExpirationDate	**Type** date **Properties** Create, Filter, Group, Nillable, Update **Description** Expiration date of the board certification.
HealthcareProviderId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Healthcare provider that this board certification is associated with. This field is a relationship field. **Relationship Name** HealthcareProvider **Relationship Type** Lookup **Refers To** HealthcareProvider
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the provider.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
PractitionerId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Practitioner that this certification is associated with.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** System from which the record was sourced.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description ID of the system from which the record was sourced.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the certification.
`TerminationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Termination date for this provider.
`TerminationReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reason for termination.

Associated Objects

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

BoardCertificationChangeEvent (API version 60.0)
Change events are available for the object.

BoardCertificationFeed
Feed tracking is available for the object.

BoardCertificationHistory
History is available for tracked fields of the object.

BoardCertificationOwnerSharingRule
Sharing rules are available for the object.

BoardCertificationShare
Sharing is available for the object.

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.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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 **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of funds for a budget shown in currency format.
`EstimatedUtilizationAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The amount that's estimated to be utilized from the budget.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the budget and its related business processes.
`IsSubmitted`	**Type** 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`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the budget.

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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
ParentBudgetId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the associated parent budget. This field is available from API version 56.0 and later. This field is a relationship field. **Relationship Name** ParentBudget **Relationship Type** Lookup **Refers To** Budget
PeriodEndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end of the date range for which the budget applies.
PeriodName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of the time period to which the budget applies.
`PeriodStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The beginning of the date range for which the budget applies.
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The quantity used to track a budget for non-currency projects. For example, this could be number of hours or number of resources.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the budget. Possible values are: • `Active`

Field	Details
	• `Archived` • `Planned`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Categorizes the budget by how it will be used. Possible values are: • `Department` • `Program` • `Project`
`UtilizedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** 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.

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 Grants Management or Grantmaking license is enabled, Grants Management or Grantmaking is enabled, and the Manage Budgets system permission is assigned to users.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount of allocated funds.
`BudgetCategoryValueId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The budget that this allocation is related to. This field is a relationship field.

Field	Details
	Relationship Name Budget **Relationship Type** Master-Detail **Refers To** Budget
FundingDisbursementId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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. **Relationship Name** FundingDisbursement **Relationship Type** Lookup **Refers To** FundingDisbursement
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description A descriptive name for the allocation.
`Quantity`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total quantity amount allocated for non-currency projects.
`Status`	**Type** 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.

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.

Fields

Field	Details
`BudgetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The parent budget that's associated with the budget category. This field is a relationship field. **Relationship Name** Budget **Relationship Type** Master-Detail **Refers To** Budget
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the budget category.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the budget category.
`Reason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason why an item is being included in the budget.
`SequenceNumber`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** 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 on page 826
Feed tracking is available for the object.

BudgetCategoryHistory on page 835
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.

Fields

Field	Details
`ActualAmount`	**Type** 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`	**Type** 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`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The planned amount for the budget.
`BudgetCategoryId`	**Type** 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 **Relationship Type** Master-Detail

Field	Details
	Refers To BudgetCategory
BudgetDivisionId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about how the budget was used. This field is available from API version 59.0 and later.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of this budget category value.
`Quantity`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The planned quantity for the budget. Use when establishing budgets for non-currency projects.
`VarianceAmount`	**Type** currency **Properties** 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`	**Type** double **Properties** 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.

BudgetCategoryValueFeed **on page 826**
Feed tracking is available for the object.

BudgetCategoryValueHistory **on page 835**
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.

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.

Fields

Field	Details
`BudgetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The budget associated with the budget participant. This field is a relationship field. **Relationship Name** Budget **Relationship Type** Master-Detail **Refers To** Budget
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the budget.

Field	Details
`IsParticipantActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the budget participant is currently active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the budget participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the budget. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup

Field	Details
	Refers To Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant role associated with the budget 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.

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.

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.

Fields

Field	Details
`BudgetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The parent budget that's associated with the budget period. This field is a relationship field. **Relationship Name** Budget **Relationship Type** Master-Detail **Refers To** Budget
`IsSubmitted`	**Type** 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 59.0 and later. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the budget period.
`PeriodEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the budget period ends.
`PeriodStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the budget period.
`SequenceNumber`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** 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 on page 826
Feed tracking is available for the object.

BudgetPeriodHistory on page 835
History is available for tracked fields of the object.

BusinessLicense

Represents an authorization issued by a regulatory agency. The authorization can be granted to an organization, a contact, or a specific user.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the authorized organization. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`BusinessTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The business type category of the authorized organization or person. This field is a relationship field. **Relationship Name** BusinessType **Relationship Type** Lookup **Refers To** BusinessType
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the authorized contact.

Field	Details
	This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`HealthcareProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the Healthcare Provider who holds this license. This field is a relationship field. **Relationship Name** HealthcareProvider **Relationship Type** Lookup **Refers To** HealthcareProvider
`Identifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** A unique identifier for this authorization. This field is unique within your organization.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Whether the authorization is still valid and in effect. The default value is `false`.
`Issuer`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of the regulatory authority that issued the authorization.
`JurisdictionCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country that this authorization covers. Only used if `JurisdictionType` is set to `COUNTRY`.
`JurisdictionOther`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The county or other area that this authorization covers. Only used if `JurisdictionType` is set to `COUNTY`.
`JurisdictionState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The state or province that this authorization covers. Only used if `JurisdictionType` is set to `STATE` or `PROVINCE`.
`JurisdictionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of geopolitical area that this authorization covers. Possible values are: • `COUNTRY` • `COUNTY` • `PROVINCE` • `STATE`
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of this authorization.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PeriodEnd`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which this authorization expires.

Field	Details
`PeriodStart`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which this authorization goes into effect.
`RegulatoryAuthorizationTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the regulatory authorization type. This field is a relationship field. **Relationship Name** RegulatoryAuthorizationType **Relationship Type** Lookup **Refers To** RegulatoryAuthorizationType
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current status of the authorization. Possible values are: • `Draft` • `Inactive` • `Revoked` • `Verified`
`UserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the authorized user. This field is a relationship field.

Field	Details
	Relationship Name User **Relationship Type** Lookup **Refers To** User
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current status of the verification process for this authorization. Possible values are: • `Authorized`
`VerifiedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date that this authorization was verified.

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.

BusinessLicenseChangeEvent on page 837 (API Version 55.0)
Change events are available for the object.

BusinessLicenseFeed on page 826
Feed tracking is available for the object.

BusinessLicenseHistory on page 835
History is available for tracked fields of the object.

BusinessLicenseOwnerSharingRule on page 832
Sharing rules are available for the object.

BusinessLicenseShare on page 825
Sharing is available for the object.

BusinessLicenseApplication

Represents an application form submitted by a business owner. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the applicant's account. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`AdditionalLocationDescription`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Additional text describing the applicant's location.
`AmountPaid`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount paid by the applicant.
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the individual who is submitting the business license application.

Field	Details
	This field is a relationship field. **Relationship Name** Applicant **Relationship Type** Lookup **Refers To** Contact
`ApplicationCaseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the case associated to the application. This field is a relationship field. **Relationship Name** ApplicationCase **Relationship Type** Lookup **Refers To** Case
`ApplicationCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Categorizes the ways an application can be processed. Possible values are: • `Basic` • `Special`
`ApplicationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the application. Possible values are: • `Change Of Circumstance`—Available in API versions 62.0 and later.

Field	Details
	• `ChangeOfCircumstance`—Available in API versions 60.0 and 61.0. • `New` • `Recertification`—Available in API version 60.0 and later. • `Renewal`
`AppliedDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date the application was submitted.
`ApprovedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the application was approved.
`BusinessTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the business activity associated with the application. This field is a relationship field. **Relationship Name** BusinessType **Relationship Type** Lookup **Refers To** BusinessType
`Category`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The service category for the application. Possible values are: • `Permit`

Field	Details
	• Emergency Service
Description	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description for the application.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** 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.
LicensePermitNameId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the issued license or permit for this application. This field is a relationship field. **Relationship Name** LicensePermitName **Relationship Type** Lookup **Refers To** BusinessLicense
LicenseTypeId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The ID of the type of license associated with this application. This field is a relationship field. **Relationship Name** LicenseType **Relationship Type** Lookup **Refers To** RegulatoryAuthorizationType
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The auto-generated unique identifier for the application.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user that owns this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PaymentDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when payment was received from the applicant.

Field	Details
PrimaryOwnerId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the primary business owner associated with the business license application. This field is a relationship field. **Relationship Name** PrimaryOwner **Relationship Type** Lookup **Refers To** Contact
RequirementsCompleteDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when all requirements were met for approval of the application.
SavedApplicationRef	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reference to the saved application. This field is a relationship field. **Relationship Name** SavedApplicationRef **Relationship Type** Lookup **Refers To** PreliminaryApplicationRef
SiteAddress	**Type** address **Properties** Filter, Nillable **Description** Full address of the business location.

Field	Details
`SiteCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** City of the business location.
`SiteCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Country of the business location.
`SiteGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The expected precision of the latitude and longitude values provided for the business. Possible values are: • `Address` • `Block` • `City` • `County` • `ExtendedZip` • `NearAddress` • `Neighborhood` • `State` • `Street` • `Unknown` • `Zip`
`SiteLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Latitude for the business location.

Field	Details
`SiteLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Longitude for the business location.
`SitePostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Postal or zip code for the business location.
`SiteState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** State or province code for the business location.
`SiteStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street address for the business location.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The submission and approval status of the application. Possible values are: • `Application Accepted` • `Approved` • `Approved with Conditions` • `Cancelled` • `In Review` • `Inspection Phase` • `Submitted`

Field	Details
`WasReturned`	**Type** 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. Unless noted, they are available in the same API version as this object.

BusinessLicenseApplicationChangeEvent (API Version 55.0)
Change events are available for the object.

BusinessLicenseApplicationFeed
Feed tracking is available for the object.

BusinessLicenseApplicationHistory
History is available for tracked fields of the object.

BusinessLicenseApplicationOwnerSharingRule
Sharing rules are available for the object.

BusinessLicenseApplicationShare
Share is available for the object.

BusinessMilestone

Represents the milestones of a business, such as acquisition, market listing, and expansion.

Supported Calls

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

Fields

Field	Details
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

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

Field	Details
	Properties Create, Filter, Sort, Update **Description** Required. The date on which the business milestone occurred.
`MilestoneDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the business milestone.
`MilestoneSiteId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the business milestone occurred. For example, the location where a business deal was won.
`MilestoneType`	**Type** picklist **Properties** Create, Filter, Group, Sort **Description** Required. The type of the business milestone. Possible values are: • `Award` • `Bankruptcy` • `Executive Change` • `Expansion` • `Incorporation` • `Market Listing` • `Merger & Acquisition` • `New Funding` • `New Partnership` • `New Product Launch`
`Name`	**Type** string

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

Associated Objects

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

BusinessMilestoneFeed
Feed tracking is available for the object.

BusinessMilestoneHistory
History is available for tracked fields of the object.

BusinessMilestoneOwnerSharingRule on page 832
Sharing rules are available for the object.

BusinessMilestoneShare on page 825
Sharing is available for the object.

BusinessProfile

Represents details about the business on the license or permit application. 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`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the account associated with this business profile.
`BusinessOperatingName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update, idLookup **Description** Name that the business operates with.
`BusinessStructure`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Business structure as mentioned in the business license application. Possible values are: • `Corporation` • `LLC` • `Partnership`

Field	Details
	• `Sole Proprietorship`
`BusinessTaxIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID issued to the business by the taxation authority.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the business profile.

Associated Objects

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

BusinessProfileHistory
History is available for the object.

BusinessProfileFeed
Feed tracking is available for the object.

BusinessType

Represents a category of any activity (business or individual), such as healthcare, restaurant, or retail. 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
`ActivityCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code identifying the principal business activity of a business or individual.
`AuthorizationActivityType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of entity performing the activity. Possible values are: • `Business` • `Occupation` The default value is `Business`.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text describing the business activity.
`Industry`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The industry to which the business is related. Possible values are: • `Food and Beverages` • `Healthcare` • `Law` • `Retail`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** 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`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the business type.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user that owns this record.

Associated Objects

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

BusinessTypeFeed on page 826
Feed is available for the object. This object is available in API version 51.0 and later.

BusinessTypeHistory on page 835
History is available for the object. This object is available in API version 51.0 and later.

BusinessTypeOwnerSharingRule on page 832
Sharing rules are available for the object.

BusinessTypeShare on page 825
Share is available for the object.

BusRegAuthorizationType

Represents the association between authorization activity and license or permit type.

Supported Calls

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

Fields

Field	Details
`BusinessTypeIdentifierId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the business type that this requirement applies to.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** 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.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of this business emergency service type.
`RegAuthTypeIdentifierId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the emergency service type that this permit or license applies to.

Associated Objects

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

BusRegAuthorizationTypeFeed
Feed is available for the object. This object is available in API version 51.0 and later.

BusRegAuthorizationTypeHistory
History is available for the object. This object is available in API version 51.0 and later.

BusRegAuthTypeDependency

Information related to the association of permit to permit dependency in a given business context. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
`DependentBusRegAuthId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description The regulatory authorization type that requires the parent regulatory authorization type.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the examination taken by the person.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this record.
`ParentBusRegAuthId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The regulatory authorization type that is a requirement for the child regulatory authorization type.

Associated Objects

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

BusRegAuthTypeDependencyFeed on page 826
Feed is available for the object. This object is available in API version 51.0 and later.

BusRegAuthTypeDependencyHistory on page 835
History is available for the object. This object is available in API version 51.0 and later.

BusRegAuthTypeDependencyOwnerSharingRule on page 832
Sharing rules are available for the object.

BusRegAuthTypeDependencyShare on page 825
Sharing is available for the object.

CareBarrier

Represents an obstacle or circumstance that prevents a constituent from getting the required care or services. 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 if care plans are enabled in your org. To access the object, you need the Care Plans Access permission set or the Care Plans permission set license.

Fields

Field	Details
`CareBarrierTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID for the associated care barrier type. This field is a relationship field. **Relationship Name** CareBarrierType **Relationship Type** Lookup

Field	Details
	Refers To CareBarrierType
CaseId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the associated case. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the care barrier.
EffectiveFrom	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the care barrier is effective.
EffectiveTo	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the care barrier is no longer effective.
IsActive	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the care barrier is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the care barrier.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
PatientId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The affected patient or constituent. This field is a relationship field. **Relationship Name** Patient **Relationship Type** Master-detail **Refers To** Account (the master object)
Priority	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The priority of the care barrier. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the care barrier record in the external source system.
SourceSystemModifiedDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the care barrier record was last modified in the external source system.
SourceSystemName	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name of the external source system from which the record was imported.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The status of the care barrier. Possible values are: • `Active` • `Disabled` • `Inactive`

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.

CareBarrierChangeEvent on page 837
Change events are available for the object.

CareBarrierFeed on page 826
Feed tracking is available for the object.

CareBarrierHistory on page 835
History is available for tracked fields of the object.

CareBarrierOwnerSharingRule on page 832
Sharing rules are available for the object.

CareBarrierShare on page 825
Sharing is available for the object.

CareBarrierType

Represents the standard, defined list of barriers maintained by an organization. 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 if care plans are enabled in your org. To access the object, you need the Care Plans Access permission set or the Care Plans permission set license.

Fields

Field	Details
`Code`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Medical vocabulary code for the care barrier type.
`CodeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Medical vocabulary code type for the care barrier type. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the care barrier type.
`DiagnosisCodeSetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Diagnosis code set associated with the care barrier type. This field is a polymorphic relationship field. **Relationship Name** DiagnosisCodeSet **Relationship Type** Lookup

Field	Details
	Refers To CodeSet, CodeSetBundle
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the care barrier type is active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the care barrier type.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner **Relationship Type** Lookup **Refers To** Group, User

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.

CareBarrierTypeChangeEvent on page 837
Change events are available for the object.

CareBarrierTypeFeed on page 826
Feed tracking is available for the object.

CareBarrierTypeHistory on page 835
History is available for tracked fields of the object.

CareBarrierTypeOwnerSharingRule on page 832
Sharing rules are available for the object.

CareBarrierTypeShare on page 825
Sharing is available for the object.

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()`

Fields

Field	Details
`CarePlanTemplateId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The care plan template associated with the care plan. This is a relationship field. **Relationship Name** CarePlanTemplate **Relationship Type** Lookup **Refers To** CarePlanTemplate
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The case associated with the care plan. This is a relationship field. **Relationship Name** Case **Relationship Type** Master-Detail **Refers To** Case
`CaseProceedingResultId`	**Type** 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

Field	Details
ClaimId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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 **Refers To** Claim
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** The description for the care plan record.
EndDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date until when the care plan is effective.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the care plan record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The account associated with the care plan. This is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Account, Contact
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date from when the care plan is effective.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the care plan. Possible values are: • `Active` • `Cancelled` • `Completed`

Field	Details
	• `Draft` • `Proposed`
`TaskJobStatus`	**Type** 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`
`TaskJobStatusMessage`	**Type** 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 on page 826
Feed tracking is available for the object.

CarePlanHistory on page 835
History is available for tracked fields of the object.

CarePlanDetail

Represents additional information associated with a care plan record. These details may be things addressed by the care plan, contributors in the care plan, supporting information, and so on. 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 if care plans are enabled in your org. To access the object, you need the Care Plans Access permission set or the Care Plans permission set license.

Fields

Field	Details
`CarePlanId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the associated care plan. This field is a relationship field. **Relationship Name** CarePlan **Relationship Type** Master-detail **Refers To** CarePlan (the master object)
`DetailCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The system-defined code that represents additional information associated with the care plan. This field is a polymorphic relationship field. **Relationship Name** DetailCode **Relationship Type** Lookup **Refers To** CodeSet, CodeSetBundle
`DetailRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The reference record that represents additional information associated with the care plan. This field is a polymorphic relationship field. **Relationship Name** DetailRecord **Relationship Type** Lookup **Refers To** Account, CareBarrier, CarePlan, HealthcarePractitionerFacility, HealthcareProvider
`DetailType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of additional information associated with the care plan. Possible values are: • `Care Barrier` • `Injury`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the care plan detail.

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`TaskJobStatus`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The status of the task job. Possible values are: • `Completed` • `Failed` • `InProgress` • `Submitted`
`TaskJobStatusMessage`	**Type** textarea **Properties** Nillable **Description** The status message for the task job.

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.

CarePlanDetailFeed on page 826
Feed tracking is available for the object.

CarePlanDetailHistory on page 835
History is available for tracked fields of the object.

CarePlanDetailOwnerSharingRule on page 832
Sharing rules are available for the object.

CarePlanDetailShare on page 825
Sharing is available for 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()`

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the care plan template record.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the care plan template record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the care plan template record owner. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the care plan template. Possible values are: • `Draft` • `Inactive` • `Published` 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.

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
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The name of the care plan template benefit record. This is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup **Refers To** Benefit
`CarePlanTemplateId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The care plan template associated with the care plan template benefit. This is a relationship field. **Relationship Name** CarePlanTemplate **Relationship Type** Master-Detail **Refers To** CarePlanTemplate
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the care plan template benefit record.
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the priority of the care plan template benefit. Possible values are: • `High` • `Low` • `Medium`

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.

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
CarePlanTemplateId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The care plan template associated with the care plan template goal. This is a relationship field. **Relationship Name** CarePlanTemplate **Relationship Type** Master-Detail **Refers To** CarePlanTemplate
GoalDefinitionId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The goal definition associated with the care plan template goal. This is a relationship field. **Relationship Name** GoalDefinition **Relationship Type** Lookup **Refers To** GoalDefinition
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the care plan template goal.
`Priority`	**Type** 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`

CareProviderAdverseAction

Captures adverse actions against the provider, such as malpractice lawsuits or revoked licenses.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account this adverse action is associated with.
`AccreditationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The accreditation that might be affected by this adverse action.
`ActionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of adverse action that is being taken. Possible values are: • `AdministrativeDisciplinaryAction` • `CourtOrder` • `FelonyConviction` • `MalpracticeJudgement` • `MisdemeanorConviction` • `ProbationaryLicense`
`BoardCertificationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The board certification that might be affected by this adverse action
`BusinessLicenseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The business license that might be affected by this adverse action.
`CaseNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The case number associated with this adverse action.
`CourtSentence`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The final sentence by the governing court, if any.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Summary of the adverse action.
`EffectiveFrom`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this Adverse Action is effective.
`EffectiveTo`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this Adverse Action is no longer effective.
`HealthcareProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description HealthcareProvider that this Adverse Action is associated with
`Jurisdiction`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the court or goverment body that issued the legal determination.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the adverse action that is being taken.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Time stamp that indicates when the current user last viewed this record.
`PractitionerId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The practitioner this adverse action record is associated with.
`ReportingEntity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the entity or organization that reported this action.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** System from which the record was sourced.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Unique record ID in source system.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the license or certification, such as "revoked" or "suspended." Possible values are: • `Active` • `Revoked` • `Suspended`

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.

CareProviderAdverseActionChangeEvent (API version 60.0)
Change events are available for the object.

CareProviderAdverseActionFeed
Feed tracking is available for the object.

CareProviderAdverseActionHistory
History is available for tracked fields of the object.

CareProviderAdverseActionOwnerSharingRule
Sharing rules are available for the object.

CareProviderAdverseActionShare
Sharing is available for the object.

CareProviderFacilitySpecialty

Represents all the specialties that the practitioner provides at a given location. For example, a physician who is board-certified in both spine and neuro may provide spine services at one location and neuro services at another.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`EffectiveFrom`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this record is effective.
`EffectiveTo`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this record is no longer effective.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
`IsPrimarySpecialty`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this specialty is the practitioner's primary specialty at this facility, or the facility's primary specialty.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the specialty provided at this provider facility.

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
PractitionerFacilityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Practitioner facility associated with this provider facility specialty record.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** System from which the record was sourced.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the system from which the record was sourced.
SpecialtyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies the specialty associated with this provider facility specialty record
SpecialtyRole	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Role of the specialty for the provider or practitioner.

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.

CareProviderFacilitySpecialtyChangeEvent (API version 60.0)
Change events are available for the object.

CareProviderFacilitySpecialtyFeed
Feed tracking is available for the object.

CareProviderFacilitySpecialtyHistory
History is available for tracked fields of the object.

CareProviderFacilitySpecialtyOwnerSharingRule
Sharing rules are available for the object.

CareProviderFacilitySpecialtyShare
Sharing is available for the object.

CareSpecialty

Represents a listing of provider specialty codes and descriptions.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`Description`	**Typestring** **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the specialty.
`EffectiveFrom`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date from which this specialty is effective.
EffectiveTo	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this specialty is no longer effective.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup Sort, Update **Description** Name of the specialty master record.
OwnerId	**Type** reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`SpecialtyCode`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Code for the specialty.
`SpecialtyType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of care specialty. Possible values are: • `Food and Nutrition` • `Housing and Maintenance` • `Goods` • `Transit` • `Health` • `Money` • `Care` • `Education` • `Employment` • `Legal`
`SpecialtyUsage`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether this specialty is related to the practitioner, the organization, or both. Possible values are: • `Practitioner` • `Provider` • `Both`

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.

CareSpecialtyFeed on page 826
Feed tracking is available for the object.

CareSpecialtyHistory on page 835
History is available for tracked fields of the object.

CareSpecialtyOwnerSharingRule on page 832
Sharing rules are available for the object.

CareSpecialtyShare on page 825
Sharing is available for the object.

CaseEpisode

Represents the episode linked to a case or a case proceeding result, where a business or person or license is the subject. This object is available in API version 58.0 and later.

Fields

Field	Details
`AddressId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The address where the subject is being removed from or placed at. This field is a relationship field.

Field	Details
	Relationship Name Address **Relationship Type** Lookup **Refers To** Address
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Specifies the case associated with the case episode. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the case episode.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** End date of the case episode.
`EpisodeAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies business or person account who are involved in the removal or placement of the subject. This field is a relationship field. **Relationship Name** EpisodeAccount **Relationship Type** Lookup **Refers To** Account
`EpisodeReasonId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The situation that led to the case episode. This field is a relationship field. **Relationship Name** EpisodeReason **Relationship Type** Lookup **Refers To** CaseProceedingResult
`EpisodeSubType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the subtypes of the case episode. Possible values are: • `Foster Care Organization` • `Foster Care Family` • `Home Parents` • `Prison` • `Specified Relative`
`EpisodeType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** Specifies the types of case episode. Possible values are: • `Detention` • `Eviction` • `Placement` • `Probation` • `Removal` • `Revocation` • `Suspension`
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the case episode record.
`RelatedEpisodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the relationship between all related case episodes.

Field	Details
	This field is a relationship field. **Relationship Name** RelatedEpisode **Relationship Type** Lookup **Refers To** CaseEpisode
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Start date of the case episode.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the case episode. Possible values are: • `Closed` • `In Progress` • `Open`
`StatusChangeReason`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Specifies the reason for changing the status of the case episode.
`SubjectId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the subject involved in the case episode. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Subject **Relationship Type** Lookup **Refers To** Account, BusinessLicense, Contact

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.

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
`AuthorizationProof`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** 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`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the case participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant associated with the case participant record. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Participant **Relationship Type** Lookup **Refers To** Account, Contact
`PreferredCallTimeFrom`	**Type** time **Properties** Create, Filter, Nillable, Sort, Update **Description** The start of the preferred time window for contacting the participant. This field is available in API version 58.0 and later.
`PreferredCallTimeTo`	**Type** time **Properties** Create, Filter, Nillable, Sort, Update **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.

Field	Details
	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` • `Inactive`

CaseProceeding

Represents a legal and formal demand for the enforcement of an individual's rights against another party in a court of justice. This object is available in API version 58.0 and later.

Fields

Field	Details
`AddressId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Address of the location where the case proceeding is being conducted. This field is a relationship field. **Relationship Name** Address

Field	Details
	Relationship Type Lookup **Refers To** Address
`ApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The relationship between case proceeding and a business license application or an individual application. This field is a polymorphic relationship field. **Relationship Name** Application **Relationship Type** Lookup **Refers To** BusinessLicenseApplication, IndividualApplication
`CaseFilingDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The data and time when the case proceeding was initiated.
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The case associated with the case proceeding record. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the case proceeding record.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the case proceeding was completed.
`ExternalCaseIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of the related case in an external system.
`ExternalIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier for this case proceeding.
`LastReferencedDate`	**Type** 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
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last viewed this record or list view.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the case proceeding record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the case proceeding record owner. Available in API version 62.0 and later. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`RelatedCaseProceedingId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a case proceeding related to this case proceeding. This field is a relationship field. **Relationship Name** RelatedCaseProceeding **Relationship Type** Lookup **Refers To** CaseProceeding
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date and time from when the case proceeding began.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the case proceeding. Possible values are: • `Completed` • `Planned`
`SubType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subtype of the case proceeding. Possible values are: • `Appeal` • `Disposition` • `Review Hearing`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The type of case proceeding. Possible values are: • `Board Proceeding` • `Court Action` • `Mediation` • `Warrant Request`

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.

CaseProceedingFeed on page 826
Feed tracking is available for the object.

CaseProceedingHistory on page 835
History is available for tracked fields of the object.

CaseProceedingOwnerSharingRule on page 832 (API version 62.0)
Sharing rules are available for the object.

CaseProceedingShare on page 825 (API version 62.0)
Sharing is available for the object.

CaseProceedingComplaint

Represents the association between a complaint and its corresponding case proceeding. This object is available in API version 58.0 and later.

Fields

Field	Details
`CaseProceedingId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The case proceeding associated with the case proceeding complaint record. This field is a relationship field. **Relationship Name** CaseProceeding **Relationship Type** Lookup **Refers To** CaseProceeding
`ComplaintId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The complaint associated with the case proceeding record. This field is a relationship field.

Field	Details
	Relationship Name Complaint **Relationship Type** Lookup **Refers To** PublicComplaint
`LastReferencedDate`	**Type** 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
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the case proceeding complaint record.

CaseProceedingInfraction

Represents the association between an infraction and its corresponding case proceeding. This object is available in API version 58.0 and later.

Fields

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.

Field	Details
CaseProceedingId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The case proceeding associated with the case proceeding infraction record. This field is a relationship field. **Relationship Name** CaseProceeding **Relationship Type** Master-detail **Refers To** CaseProceeding
InfractionId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The infraction associated with the case proceeding record. This field is a relationship field. **Relationship Name** Infraction **Relationship Type** Lookup **Refers To** RegulatoryCodeViolation
InfractionReportingReason	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The conditions that caused the case proceeding infraction record.
InfractionReportingType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The proofs that led to the case proceeding infraction record.

Field	Details
	Possible values are: • `Exhibit` • `Piece of Evidence` • `Proof` • `Token`
`LastReferencedDate`	**Type** 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
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the case proceeding infraction record.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the case proceeding infraction record. Possible values are: • `Disqualified` • `Qualified`

CaseProceedingParticipant

Represents a junction between the case proceeding and a participant, such as an account or a contact. This object stores the details of a participant who is involved in a case proceeding. This object is available in API version 58.0 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 Case Proceeding object, a case proceeding participant represents information about a user or group of participants who have access to a case proceeding.

Supported Calls

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

Fields

Field	Details
`CaseProceedingId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The case proceeding associated with the case proceeding participant record. This field is a relationship field. **Relationship Name** CaseProceeding **Relationship Type** Master-detail **Refers To** CaseProceeding (the master object)
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the case proceeding. Available in API version 62.0 and later, when Compliant Data Sharing is enabled for the Case Proceeding object.
`IsActive`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the participant's association with the case proceeding 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 Case Proceeding object.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the case proceeding participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant associated with the case proceeding record. This field is a polymorphic relationship field. **Relationship Name** Participant

Field	Details
	Relationship Type Lookup **Refers To** Account, Contact, Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The participant role associated with the case proceeding participant record. This field is a relationship field. Available in API version 62.0 and later, when Compliant Data Sharing is enabled for the Case Proceeding object. **Relationship Name** ParticipantRole **Refers To** ParticipantRole
`ParticipationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The actual type of presence of the participant during the case proceeding. Possible values are: • `Absent` • `Present In Person` • `Virtual`
`Role`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The role of the participant associated with the case proceeding record. Possible values are: • `Attorney` • `Defendant` • `Judge`

Field	Details
	• `Perpetrator` • `Plaintiff` • `Victim` • `Witness` The new Nillable property is available in API version 62.0 and later.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the participant in the case proceeding. Possible values are: • `Active` • `Inactive` The new Nillable property is available in API version 62.0 and later.

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.

CaseProceedingParticipantFeed on page 826
Feed tracking is available for the object.

CaseProceedingParticipantHistory on page 835
History is available for tracked fields of the object.

CaseProceedingResult

Represents the outcome of a legal case for a participant. This object is available in API version 58.0 and later.

Fields

Field	Details
`CaseProceedingId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description The case proceeding associated with the case proceeding result record. This field is a relationship field. **Relationship Name** CaseProceeding **Relationship Type** Lookup **Refers To** CaseProceeding
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the case proceeding result record.
`LastReferencedDate`	**Type** 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
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description**
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description**
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Possible values are: • `Confirmed` • `Temporary`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Possible values are: • `Care Plan` • `Enforcement Action` • `Episode`

CaseProgram

Represents the junction between Case and Program objects. 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()`

Fields

Field	Details
`CaseId`	**Type** reference **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

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

Claim

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

Supported Calls

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

Special Access Rules

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

To access this object on your Experience Cloud site, users need the Benefit Assistance Community Access permission set or the Benefit Assistance for Communities permission set license.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the claim. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`ActualAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual amount that was billed for the repair of damages.
`ApprovedAmount`	**Type** currency

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The amount that was approved for the repair of damages based on an agent's inspection.
`AssessmentDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was officially assessed.
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the case that created the claim. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case
`ClaimReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for initiating the claim.
`ClaimReasonType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the claim reason belongs to. For example, natural disaster, accident. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization’s requirement.

Field	Details
`ClaimType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the claim. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.
`EstimatedAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The estimated cost of damages given by the owner or the repair shop.
`FinalizedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was marked resolved, with claim status as approved or rejected.
`FnolChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The channel through which the loss was reported.
`IncidentSite`	**Type** address **Properties** Filter, Nillable **Description** The place where the accident took place. This is a compound field of type Address and combines these fields: IncidentSiteCity, IncidentSiteCountry, IncidentSiteGeocodeAccuracy, IncidentSiteLatitude, IncidentSiteLongitude, IncidentSitePostalCode, IncidentSiteState, and IncidentSiteStreet. For more information, see Address Compound Fields.

Field	Details
`InitiationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the claim was initiated.
`IsAuthoritiesNotified`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the authorities have been informed about the accident. The default value is `false`.
`IsClosed`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the claim has been closed. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`LossDate`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The date on which the accident took place.
`LossType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the loss for which the claim was initiated. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The claim number in the claims management system.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`RenewalChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The channel through which the insurance policy associated with this claim was renewed.

Field	Details
ReportDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp for when the accident report was filled out.
ReportNumber	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The number of the accident report.
ReportingAuthority	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the authority who filled out the accident report.
Severity	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The severity of the claim. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update

Field	Details
	Description The unique ID of this record in the source system.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the claim.
`Summary`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the claim.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The usage type of the record. Possible values are: • `Automotive` • `Manufacturing`
`VisitDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp for when the agent visited the site of the accident or the place where the vehicle was moved after the accident.
`VisitSite`	**Type** textarea **Properties** Create, Nillable, Update **Description** The site that the agent visited.

Associated Objects

This object has the following associated objects. 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.

ClaimFeed on page 826
Feed tracking is available for the object.

ClaimHistory on page 835
History is available for tracked fields of the object.

ClaimShare on page 825
Sharing is available for the object.

ClaimItem

Represents claim items (such as collision damage, roadside assistance, rental care) and their coverage details.

Supported Calls

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

Special Access Rules

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

To access this object on your Experience Cloud site, users need the Benefit Assistance Community Access permission set or the Benefit Assistance for Communities permission set license.

Fields

Field	Details
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the category of the claim item. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description Required. The parent claim that includes this claim item. This field is a relationship field. **Relationship Name** Claim **Relationship Type** Master-Detail **Refers To** Claim
`ClaimParticipantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim participant associated with the claim item. This field is a relationship field. **Relationship Name** ClaimParticipant **Relationship Type** Lookup **Refers To** ClaimParticipant
`CurrentAddress`	**Type** address **Properties** Filter, Nillable **Description** The location of the claim item. This is a compound field of type Address and combines these fields: CurrentCity, CurrentCountry, CurrentGeocodeAccuracy, CurrentLatitude, CurrentLongitude, CurrentPostalCode, CurrentState, and CurrentStreet. For more information, see Address Compound Fields.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the claim item.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. Name of the item that's included in the claim.

Associated Objects

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

ClaimItemFeed **on page 826**
Feed tracking is available for the object.

ClaimItemHistory **on page 835**
History is available for tracked fields of the object.

ClaimParticipant

Represents the participants of a claim such as those insured, the claimants, and the witnesses. The object associates claims with participant accounts.

Supported Calls

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

Special Access Rules

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

To access this object on your Experience Cloud site, users need the Benefit Assistance Community Access permission set or the Benefit Assistance for Communities permission set license.

Fields

Field	Details
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The ID of the claim in which this participant has one or more roles. This field is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim
`IsInjured`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the claim participant was injured in the accident. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** An auto-generated number assigned to this record.
`ParticipantAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the claim participant's account. This field is a relationship field. **Relationship Name** ParticipantAccount **Relationship Type** Lookup **Refers To** Account
`ParticipantContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the claim participant's contact. This field is a relationship field. **Relationship Name** ParticipantContact **Relationship Type** Lookup **Refers To** Contact

Field	Details
Roles	**Type** multipicklist **Properties** Create, Filter, Update **Description** Required. The roles that the claim participant can have in the claim. For example, witness, victim, defendant, claimant. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.
SourceSystem	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
SourceSystemIdentifier	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique ID of this record in the source system.

Associated Objects

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

ClaimParticipantFeed on page 826
Feed tracking is available for the object.

ClaimParticipantHistory on page 835
History is available for tracked fields of the object.

CodeSet

Represents various industry defined codes in the context of their systems and versions of those systems. These codes are used in all sorts of digital records. 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 Provider Management or care plans are enabled in your org.

To access the object, you need one of these permission sets or permission set licenses.

- Care Plans Access permission set or the Care Plans permission set license
- Provider Management Access permission set or the Provider Management permission set license

Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`Code`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The system-defined code that's represented by this code set.
`CodeDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** Additional information associated with the code set.
`CodeSetKey`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Represents a unique key that identifies the concept represented by code sets across different systems and versions. This key isn't case-sensitive.
`CodeSetType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the type of the code set.
EndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the code set's effective period.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the code set is an active code set.
IsCustomCode	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the code set is defined by a specific organization, as opposed to recognized across the industry.
IsPrimary	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the code set is the primary code set for the concept. That is, it was selected manually by a user instead of being selected by an automated process.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The last date that the record was referenced.
LastViewedDate	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The last date that the record was viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The textual representation of the meaning of the code.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** A reference to the person who owns the code set record.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The system that sets the context for the code and defines its meaning.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the code set's effective period.
`SystemVersion`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The version of the source system the code belongs to.

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.

CodeSetChangeEvent (API version 59.0)
Change events are available for the object.

CodeSetFeed on page 826
Feed tracking is available for the object.

CodeSetHistory on page 835
History is available for tracked fields of the object.

CodeSetShare on page 825
Sharing is available for the object.

CodeSetBundle

Represents a group of code sets across multiple systems and versions. All of these code sets refer to the same conceptual entity. 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 Provider Management or care plans are enabled in your org.

To access the object, you need one of these permission sets or permission set licenses.

- Care Plans Access permission set or the Care Plans permission set license
- Provider Management Access permission set or the Provider Management permission set license

Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`CodeSet10Id`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.

Field	Details
CodeSet11Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet12Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet13Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet14Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet15Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet1Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.

Field	Details
CodeSet2Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet3Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet4Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet5Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet6Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet7Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.

Field	Details
CodeSet8Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSet9Id	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A code set that represents the conceptual entity represented by the code set bundle.
CodeSetBundleKey	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** A unique key that represents the concept referenced by the bundled code sets. This value is unique, but not case sensitive.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The last date that the record was referenced.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The last date that the record was viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of a conceptual entity referenced by the different code sets grouped together in the bundle.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** References the user who owns the code set bundle record.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of the code set bundle. This field can be used to group together code set bundles of similar types. Add values to this picklist as needed for your business functions.

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.

CodeSetBundleChangeEvent (API version 59.0)
Change events are available for the object.

CodeSetBundleFeed on page 826
Feed tracking is available for the object.

CodeSetBundleHistory on page 835
History is available for tracked fields of the object.

CodeSetBundleShare on page 825
Sharing is available for the object.

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()`

Fields

Field	Details
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** 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
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The ID of the complaint being raised.

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the complaint case record owner. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
PublicComplaintId	**Type** 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

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()`

Fields

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

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the complaint participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** 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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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 **Refers To** ParticipantRole
`PublicComplaintId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The public complaint associated with the complaint participant record. This field is a relationship field.

Field	Details
	Relationship Name PublicComplaint **Relationship Type** Master-Detail **Refers To** PublicComplaint
`Role`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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 on page 826
Feed tracking is available for the object.

ComplaintParticipantHistory on page 835
History is available for tracked fields of the object.

Contact

Represents a contact, which is a person associated with an account.

Supported Calls

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

Special Access Rules

Customer Portal users can access only portal-enabled contacts.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the account that's the parent of this contact. We recommend that you update up to 50 contacts simultaneously when changing the accounts on contacts enabled for a Customer Portal or partner portal. We also recommend that you make this update after business hours. This is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`AssistantName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The assistant's name.
`AssistantPhone`	**Type** phone

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The assistant's phone number.

`Birthdate`	**Type**
	date
	Properties
	Create, Filter, Group, Nillable, Sort, Update
	Description
	The contact's birthdate.
	Filter criteria for report filters, list view filters, and SOQL queries ignore the year portion of the `Birthdate` field. For example, this SOQL query returns contacts with birthdays later in the year than today:
	`SELECT Name, Birthdate`
	`FROM Contact`
	`WHERE Birthdate > TODAY`

`Department`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact's department.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** A description of the contact. Label is **Contact Description** up to 32 KB.
`DoNotCall`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the contact doesn't want to receive calls.
`Email`	**Type** email

Field	Details
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The contact's email address.
`Fax`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact's fax number. Label is **Business Fax**.
`FirstName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact's first name up to 40 characters.
`GenderIdentity`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The contact's internal experience of their gender, which may or may not correspond to their designated sex at birth.
`HasOptedOutOfEmail`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the contact doesn't want to receive email from Salesforce (`true`) or does (`false`). Label is **Email Opt Out**.
`HasOptedOutOfFax`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the contact prohibits receiving faxes.

Field	Details
`HomePhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact's home phone number.
`IndividualId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the data privacy record associated with this contact. This field is available if Data Protection and Privacy is enabled. This is a relationship field. **Relationship Name** Individual **Relationship Type** Lookup **Refers To** Individual
`Jigsaw`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** References the company's ID in Data.com. If an account has a value in this field, it means that the account was imported from Data.com. If the field value is `null`, the account wasn't imported from Data.com. Maximum size is 20 characters. Available in API version 22.0 and later. Label is **Data.com Key**. Important: The `Jigsaw` field is exposed in the API to support troubleshooting for import errors and reimporting of corrected data. Do not modify this value.
`LastCURequestDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The last date that a Stay-in-Touch request was sent to the contact.

Field	Details
LastCUUpdateDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The last time a Stay-in-Touch update was processed for the contact.
LastName	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Required. Last name of the contact up to 80 characters.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
LeadSource	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lead's source.
MailingAddress	**Type** address **Properties** Filter, Nillable

Field	Details
	Description The compound form of the mailing address. Read-only. For details on compound address fields, see Address Compound Fields.
`MailingCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Mailing address details.
`MailingCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Mailing address details.
`MailingCountryCode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ISO codes for the mailing address's state and country.
`MailingGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update, Query, Restricted picklist, Nillable **Description** Accuracy level of the geocode for the mailing address. For details on geolocation compound field, see Compound Field Considerations and Limitations .
`MailingLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with `MailingLongitude` to specify the precise geolocation of a mailing address. Acceptable values are numbers between –90 and 90 up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.

Field	Details
`MailingLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with `MailingLatitude` to specify the precise geolocation of a mailing address. Acceptable values are numbers between –180 and 180 up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
`MailingPostalCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Mailing address details.
`MailingState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Mailing address details.
`MailingStateCode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ISO codes for the mailing address's state and country.
`MailingStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street address for mailing address.
`MiddleName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The contact's middle name up to 40 characters. To enable this field, ask Salesforce Customer Support for help.
`MobilePhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Contact's mobile phone number.
`Name`	**Type** string **Properties** Filter, Group, Sort **Description** Concatenation of `FirstName`, `MiddleName`, `LastName`, and `Suffix` up to 203 characters, including whitespaces.
`OtherAddress`	**Type** address **Properties** Filter, Nillable **Description** The compound form of the other address. Read-only. For details on compound address fields, see Address Compound Fields.
`OtherCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Alternate address details.
`OtherCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Alternate address details.

Field	Details
`OtherCountryCode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ISO codes for the alternate address's state and country.
`OtherGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Accuracy level of the geocode for the other address. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
`OtherLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with `OtherLongitude` to specify the precise geolocation of an alternate address. Acceptable values are numbers between –90 and 90 up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
`OtherLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with `OtherLatitude` to specify the precise geolocation of an alternate address. Acceptable values are numbers between –180 and 180 up to 15 decimal places. For details on geolocation compound fields, see Compound Field Considerations and Limitations.
`OtherPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Phone for alternate address.
`OtherPostalCode`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Alternate address details.
`OtherState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Alternate address details.
`OtherStateCode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ISO codes for the alternate address's state and country.
`OtherStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Street for alternate address.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the owner of the account associated with this contact. This is a relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** User

Field	Details
`Phone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Phone number for the contact. Label is **Business Phone**.
`Pronouns`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The contact's personal pronouns, reflecting their gender identity. Others can use these pronouns to refer to the contact in the third person. The entry is selected from a picklist of available values, which the administrator sets. Maximum 40 characters.
`ReportsToId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This field doesn't appear if `IsPersonAccount` is `true`. This is a relationship field. **Relationship Name** ReportsTo **Relationship Type** Lookup **Refers To** Contact
`Salutation`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Honorific abbreviation, word, or phrase to be used in front of name in greetings, such as Dr. or Mrs.
`Title`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Title of the contact, such as CEO or Vice President.

Note: If you're importing contact data and need to set the value for an audit field, such as `CreatedDate`, contact Salesforce. Audit fields are automatically updated during API operations unless you request to set these fields yourself.

Usage

Use this object to manage individual people who are associated with an account. You can create, query, delete, or update any attachment associated with a contact.

Create or update contacts by converting a lead with the `convertLead()` call.

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.

ContactChangeEvent
Change events are available for the object.

ContactFeed
Feed tracking is available for the object.

ContactHistory
History is available for tracked fields of the object.

ContactShare
Sharing is available for the object.

ContactProfile

Represents information about an individual, such as their ethnicity, citizenship, birth place, race, and so on.

Supported Calls

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

Fields

Field	Details
`BirthPlace`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual's place of birth.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The contact associated with the contact profile record. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`Ethnicity`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the ethnicity of the individual. Possible values are: • `Hispanic or Latino` • `Not Hispanic or Latino` • `Not Selected`
`HighestEducationLevel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the highest educational qualification of the individual

Field	Details
	Possible values are: • `Graduate` • `High School` • `Masters` • `Other` • `PhD`
`IsFirstGenerationStudent`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the individual is the first generation to enroll in education beyond high school. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MilitaryBranch`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the military branch if the individual has ever enlisted in the military. Possible values are: • `Air Force` • `Army` • `Coast Guard`

Field	Details
	• Marine Corps • Navy • Other • Space Force
MilitaryService	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the current status of military service. Possible values are: • Active Duty • Active Reserve • Full time • Other • Part time • Retired • Unknown • Veteran
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name for this record.
PrimaryCitizenshipType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of primary citizenship held by the individual. Possible values are: • Asylum • National • Other • Refugee

Field	Details
`Race`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the race of the individual. Possible values are: • `Alaska Native` • `American Indian` • `Asian` • `Black or African American` • `Native Hawaiian or Other Pacific Islander` • `White`
`SecondaryCitizenshipType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of secondary citizenship held by the individual. Possible values are: • `Asylum` • `National` • `Other` • `Refugee`

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.

ContactProfileFeed on page 826
Feed tracking is available for the object.

ContactProfileHistory on page 835
History is available for tracked fields of the object.

ContactProfileShare on page 825
Sharing is available for the object.

CourseOffering

Represents an instance of a training course with location and date details of training courses This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`CourseNameId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the course name.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A description of the course.
`EndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date of the course.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
LocationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the location this course was offered.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the course offered.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the owner of this record.
StartDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date of the course.

Associated Objects

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

CourseOfferingHistory

History is available for the object.

CourseOfferingOwnerSharingRule
Sharing rules are available for the object.

CourseOfferingShare
Sharing is available for the object.

CourseOfferingFeed
Feed tracking is available for the object.

CustodyChainEntry

Represents information about an entry or event in the chain of custody. 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 Evidence Management is enabled in your org. To access this object, you need the Evidence Management permission set.

Fields

Field	Details
`AssessmentTaskId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The assessment task for which a custody chain entry is created. This field is a relationship field. **Relationship Name** AssessmentTask **Relationship Type** Lookup **Refers To** AssessmentTask
`CustodianId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The user, organization, or location that has custody of the item. This field is a polymorphic relationship field. **Relationship Name** Custodian **Relationship Type** Lookup **Refers To** Account, Contact, ServiceTerritory, User
`CustodyItemId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The parent custody item that's associated with the custody chain entry record. This field is a relationship field. **Relationship Name** CustodyItem **Relationship Type** Master-Detail **Refers To** CustodyItem
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the custody chain entry record of the item.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of custody chain entry the item.
`ItemCustodySiteId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The place where the item is held in custody. This field is a polymorphic relationship field. **Relationship Name** ItemCustodySite **Relationship Type** Lookup **Refers To** Address, Location, ServiceTerritory
`ItemVerificationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of verification for the item. Possible values are: • `DualSignature` • `NoSignature` • `NotApplicable` • `SingleSignature`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced the record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed the record.
`Name`	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the custody chain entry record.
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The stage, step, task, or any custom object for which the custody entry is created. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Relationship Type** Lookup **Refers To** AssessmentTask
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date and time of custody chain entry for the item.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the custody entry record. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization’s requirement.
`StatusCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the category of the custody entry record's status.

Field	Details
	Possible values are: • `Completed` • `New`

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.

CustodyChainEntryFeed on page 826
Feed tracking is available for the object.

CustodyChainEntryHistory on page 835
History is available for tracked fields of the object.

CustodyItem

Represents information about an item in the custody chain. 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 Evidence Management is enabled in your org. To access this object, you need the Evidence Management permission set.

Fields

Field	Details
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the category of the item that's in custody.
`CollectionDateTime`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The date and time when the custody item was collected.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the item that's in custody.
`ExternalIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The external identifier for the custody item or the custody chain.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced the record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed the record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the item that's in custody.
`OwnerId`	**Type** reference

Field	Details
	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
`ReferenceItemObjectApiName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The API name of the reference object that stores the record of the item that's in custody. For internal use only.
`ReferenceItemRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the reference object that stores the record of the item that's in custody. This field is a relationship field. **Relationship Name** ReferenceItemRecord **Relationship Type** Lookup **Refers To** CareProgramEnrollee
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the item that's in custody. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization’s requirement.

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.

CustodyItemFeed on page 826
Feed tracking is available for the object.

CustodyItemHistory on page 835
History is available for tracked fields of the object.

CustodyItemShare on page 825
Sharing is available for the object.

CustodyItemRelation

Represents the relationship between a custody item and the context in which it's held. For example, a custody item related to a case or case proceeding. 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 Evidence Management is enabled in your org. To access this object, you need the Evidence Management permission set.

Fields

Field	Details
`CaseId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The case that's associated with the custody item. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case

Field	Details
`CaseProceedingId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The case proceeding that's associated with the custody item. This field is a relationship field. **Relationship Name** CaseProceeding **Relationship Type** Lookup **Refers To** CaseProceeding
`ContextId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The context of the custody item record. This field is a polymorphic relationship field. **Relationship Name** Context **Relationship Type** Lookup **Refers To** Case, CaseProceeding
`ContextType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of object of the custody item context. Possible values are: • `Case` • `CaseProceeding`
`CustodyItemId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** The custody item that's related to a context. This field is a relationship field. **Relationship Name** CustodyItem **Relationship Type** Lookup **Refers To** CustodyItem
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the custody item relation record.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the custody item relation record.

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of custody item with reference to the context. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.

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.

CustodyItemRelationFeed on page 826
Feed tracking is available for the object.

CustodyItemRelationHistory on page 835
History is available for tracked fields of the object.

CustodyItemRgltyCodeVio

Represents a junction between a custody item and the related regulatory code violation. The violation can be related to laws, regulations, or code that is associated with the custody item. 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 Evidence Management is enabled in your org. To access this object, you need the Evidence Management permission set.

Fields

Field	Details
`CustodyItemId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description The custody item that's associated with the regulatory code violation. This field is a relationship field. **Relationship Name** CustodyItem **Relationship Type** Lookup **Refers To** CustodyItem
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the custody item regulatory code violation record.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the custody item regulatory code violation record.

Field	Details
`RegulatoryCodeViolationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The regulatory code violation that's associated with the custody item. This field is a relationship field. **Relationship Name** RegulatoryCodeViolation **Relationship Type** Lookup **Refers To** RegulatoryCodeViolation
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the custody item with reference to the regulatory code violation. Picklist values aren't predefined for this field. Before you create a record, ensure that your Salesforce admin has defined picklist values based on your organization's requirement.

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.

CustodyItemRgltyCodeVioFeed **on page 826**
Feed tracking is available for the object.

CustodyItemRgltyCodeVioHistory **on page 835**
History is available for tracked fields of the object.

DocumentChecklistItem

Represents a checklist item for a file documentation upload.

Supported Calls

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

Fields

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

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

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

Associated Objects

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

DocumentChecklistItemFeed
Feed tracking is available for the object.

DocumentChecklistItemHistory
History is available for tracked fields of the object.

DocumentChecklistItemOwnerSharingRule
Sharing rules are available for the object.

DocumentChecklistItemShare
Sharing is available for the object.

Employee2

Represents an employee within a company or an organization. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access

Fields

Field	Details
`AlternateEmail`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The employee's alternate email address.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The contact associated with the employee. **Relationship Name** Contact

Field	Details
	Relationship Type Master-detail **Refers To** Contact (the master object)
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The ISO currency code for the post-authorization request. Valid value is: • `USD`—U.S. Dollar The default value is `USD`.
`EmployeeNumber`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The employee's unique ID for their organization.
`EmployeeStatus`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The employee's current work status. Valid values are: • `Active` • `Inactive` • `Leave` • `Terminated`
`EmployeeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The employee's full-time or part-time status.

Field	Details
	Valid values are: • `Alumnus` • `Contractor` • `Permanent` • `Intern` • `Temporary`
`EmploymentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The employee's full-time or part-time status. Valid values are: • `Full-Time` • `Part-Time`
`InternalOrganizationUnitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The internal organization unit associated with the employee. **Relationship Name** InternalOrganizationUnit **Refers To** InternalOrganizationUnit
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that the user only accessed the record or a related list view (`LastReferencedDate`), but not viewed the record itself.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the employee record.
`StatusEndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The planned end date for the employee's status.
`StatusStartDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The start date of the employee's current status.

Employment

Represents the details of an individual's employment with an organization. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the employment.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date when the employment is effective.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the employment is no longer effective.
`Employee2Id`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the employee2 record associated with the employment. This field is a relationship field. **Relationship Name** Employee2

Field	Details
	Refers To Employee2
`EmployeeUserId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the employee's user record. This field is a relationship field. **Relationship Name** EmployeeUser **Refers To** User
`EmploymentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of the employment. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the employment.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`ScheduleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of work schedule associated with the employment. For example, part-time or full-time. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the employment. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.

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.

EmploymentFeed on page 826
Feed tracking is available for the object.

EmploymentHistory on page 835
History is available for tracked fields of the object.

EmploymentOwnerSharingRule on page 832
Sharing rules are available for the object.

EmploymentShare on page 825
Sharing is available for the object.

EmploymentOffer

Represents an employment offer for a selected candidate. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`AcceptanceDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the recipient accepted the employment offer.

Field	Details
ApplicationFormId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the application form associated with the employment offer. This field is a relationship field. **Relationship Name** ApplicationForm **Refers To** ApplicationForm
Description	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the employment offer.
EmployeeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The employee associated with the employment offer. This field is a polymorphic relationship field. **Relationship Name** Employee **Refers To** Account, Employee2
ExpectedHireDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The expected hire date of employment.
ExpectedStartDate	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The expected start date of employment.
`ExpirationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the employment offer expires.
`JobPositionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the job position associated with the employment offer. This field is a relationship field. **Relationship Name** JobPosition **Refers To** JobPosition
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Latitude`	**Type** double

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The latitude of the location.
`Location`	**Type** location **Properties** Nillable **Description** The ID of the location associated with the employment offer.
`Longitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The longitude of the location.
`ManagerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The manager associated with the employment offer. This field is a polymorphic relationship field. **Relationship Name** Manager **Refers To** Account, Employee2
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description**
`OfferDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update

Field	Details
	Description The date and time when the employment offer was created.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`PayLevelId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The pay level associated with the employment offer. This field is a polymorphic relationship field. **Relationship Name** PayLevel **Refers To** PayGrade, PayGradeStep, PayGradeStepLocation
`PayOffer`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The currency amount offered to the recipient.
`RecipientId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The candidate who is being offered employment. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Recipient **Refers To** Account, Employee2, User
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the employment offer. Possible values are: • `Accepted` • `Draft` • `PendingApproval` • `Rejected` • `RolledOut` The default value is `Draft`.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the employment offer. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.

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.

EmploymentOfferFeed on page 826
Feed tracking is available for the object.

EmploymentOfferHistory on page 835
History is available for tracked fields of the object.

EmploymentOfferOwnerSharingRule on page 832
Sharing rules are available for the object.

EmploymentOfferShare on page 825
Sharing is available for the object.

EmploymentOfferVettingEval

Represents a junction between an employment offer and a vetting evaluation of the offer recipient. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`EmploymentOfferId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the employment offer associated with the employment offer vetting evaluation. This field is a relationship field. **Relationship Name** EmploymentOffer **Relationship Type** Master-detail **Refers To** EmploymentOffer (the master object)

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the employment offer vetting evaluation.
`VettingEvaluationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the vetting evaluation associated with the employment offer vetting evaluation. This field is a relationship field. **Relationship Name** VettingEvaluation **Refers To** VettingEvaluation

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.

EmploymentOfferVettingEvalFeed **on page 826**
Feed tracking is available for the object.

EmploymentOfferVettingEvalHistory on page 835
History is available for tracked fields of the object.

Examination

Represents information about the authorized examinations that qualify a license or permit. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the exam.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description Name of the examination.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this record.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of this examination. Possible values are: • `Active` • `Inactive`

Associated Objects

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

ExaminationOwnerSharingRule
Sharing rules are available for the object.

ExaminationShare
Sharing is available for the object.

ExaminationFeed **on page 826**
Feed is available for the object.

ExaminationHistory **on page 835**
History is available for 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()`

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.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total award amount.
`AwardNumber`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** The unique identifier of the funding award in the customer's org.
`AwardeeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The entity related to the funding award. The account can be an organization or individual that receives the funding. This field is a relationship field. **Relationship Name** Awardee **Relationship Type** Lookup **Refers To** Account

Field	Details
BudgetId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The budget that's used to track the use of the award funding. This field is a relationship field. **Relationship Name** Budget **Relationship Type** Lookup **Refers To** Budget
ContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual receiving the funding award. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
DecisionDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time of the decision about the funding award.
EndDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the contract related to the award ends.

Field	Details
FundingOpportunityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The funding opportunity that's associated with the award. This field is a relationship field. **Relationship Name** FundingOpportunity **Relationship Type** Lookup **Refers To** FundingOpportunity
IndividualApplicationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual application that's related to the award. This field is a relationship field. **Relationship Name** IndividualApplication **Relationship Type** Lookup **Refers To** IndividualApplication
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.

Field	Details
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the funding award.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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 **Description** The parent funding award for this amendment. This field is a relationship field. **Relationship Name** ParentFundingAward **Relationship Type** Lookup **Refers To** FundingAward
StartDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the contract related to the award begins.

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the current status of the award. Possible values are: • `Active` • `Cancelled` • `Completed`

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.

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.

Fields

Field	Details
`AdjustedAwardAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual amount that's approved for adjustment in the funding award amount.
`AdjustedEndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The actual date of adjustment to the end date of the funding award.
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status of the requested adjustment. Possible values are: • `Approved` • `In Review` • `New` • `Rejected`
`Comments`	**Type** textarea **Properties** Create, Nillable, Update **Description** The comment about the approval or rejection of the adjustment request.
`FundingAwardId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The funding award that's associated with the contract that's adjusted. This field is a relationship field. **Relationship Name** FundingAward **Relationship Type** Lookup **Refers To** FundingAward
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of amendment for the funding award.
ProposedAwardAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount of adjustment requested in the award amount.
ProposedEndDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The requested change to the End Date of the funding award.
Reason	**Type** textarea **Properties** Create, Nillable, Update **Description** The reason for the adjustment requested in the contract.
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the status of the adjustment request. Possible values are: • `Approved` • `Draft` • `Rejected` • `Submitted`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of adjustment. Possible values are: • `Administrative` • `Amount` • `Scope` • `Timeline`

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 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.

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the funding award.
`FundingAwardId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** 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`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the funding award participant is currently active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the funding award participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the funding award. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The 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 that is needed for the award to either be approved or closed. 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.

Fields

Field	Details
`ApprovalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status the information that's submitted against the requirements. Possible values are: • `Approved` • `In Review` • `New` • `Rejected`
`AssignedContactId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the person who is responsible for submitting the requirement. This field is a relationship field. **Relationship Name** AssignedContact **Relationship Type** Lookup **Refers To** Contact
`AssignedUserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user who submits the funding requirement. This field is a relationship field. **Relationship Name** AssignedUser **Relationship Type** Lookup **Refers To** User
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the funding requirement.
`DueDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The last date and time of submitting the requirement.

Field	Details
`FundingAwardId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The funding award that's associated with the funding requirement. This field is a relationship field. **Relationship Name** FundingAward **Relationship Type** Lookup **Refers To** FundingAward
`FundingDisbursementId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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. **Relationship Name** FundingDisbursement **Relationship Type** Lookup **Refers To** FundingDisbursement
`IsApproved`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the information submitted matches the requirement (true) or not (false). The default value is `false`.
`IsReadOnlyExternalAccess`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort

Field	Details
	Description Indicates whether the requirement is submitted (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the funding requirement.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the funding requirement. Possible values are: • `Approved` • `Delayed` • `In Progress` • `Open` • `Rejected` • `Submitted`
`SubmittedDate`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The actual date and time when the requirement was submitted.
`Type`	**Type** 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`

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.

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.

Fields

Field	Details
`ApplicationStageDefinitionId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** 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 **Description** The user assigned to complete the funding award requirement section. This field is a relationship field. **Relationship Name** AssignedUser **Relationship Type** Lookup **Refers To** User
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the funding award requirement section.
`DisplayOrder`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The order in which the funding award requirement section shows on the form.

Field	Details
`DueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the funding award requirement section is due.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the funding award requirement section ends.
`FundingAwardRequirementId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** 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 **Refers To** FundingAwardRequirement (the master object)
`IsAssignedToMe`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** 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`	**Type** boolean

Field	Details
	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`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the funding award requirement section has been submitted (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the funding award requirement section
`OwnerId`	**Type** reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the funding award requirement section starts.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the funding award requirement section. Possible values are: • `Canceled` • `Completed` • `In Progress` • `Not 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.

FundingAwardRqmtSectionHistory
History is available for tracked fields of the object.

FundingAwardRequirementFeed
Feed tracking is available for the object.

FundingAwardRqmtSectionOwnerSharingRule
Sharing rules are available for the object.

FundingAwardRqmtSectionShare
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.

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.

Fields

Field	Details
`Amount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total amount that's disbursed to the awardee.
`DisbursementDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual date and time of funds disbursement.
`FundingAwardId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The funding award that's associated with the funding disbursement. This field is a relationship field.

Field	Details
	Relationship Name FundingAward **Relationship Type** Lookup **Refers To** FundingAward
`IsApproved`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the funding disbursement is approved (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description**
`OwnerId`	**Type** **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 **Refers To** Group, User
`PaymentMethodType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the payment method for funds disbursement. Possible values are: • `Cash` • `Check` • `EFT` • `Wire`
`PaymentNumber`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, Sort **Description** The unique identifier of the payment related to the funds disbursement.
`ScheduledDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The scheduled date and time to disburse the funds.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status of the funds disbursement. Possible values are: • `Approved` • `Cancelled`

Field	Details
	• `Paid` • `Pending Approval` • `Processing` • `Returned` • `Scheduled`

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.

Fields

Field	Details
`ActionPlanTemplateId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The action plan template that represents the application sections for this funding opportunity. **Relationship Name** ActionPlanTemplate **Refers To** ActionPlanTemplate
`ApplicationInstructions`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description The instructions on how to apply for the funding opportunity.
`ApplicationTimelineId`	**Type** 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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description about the opportunity in terms of the minimum award requirements and expected outcome.

Field	Details
EndDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the acceptance of funding opportunity applications ended.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
MaximumFundingAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The maximum fund amount that's awarded.
MinimumFundingAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The minimum fund amount that's awarded.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the funding opportunity.

Field	Details
OwnerId	**Type** 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	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The associated parent funding opportunity. 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	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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

Field	Details
	Relationship Type Lookup **Refers To** Program
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the acceptance of funding opportunity applications started.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the funding opportunity. Possible values are: • `Active` • `Cancelled` • `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.

FundingOpportunityOwnerSharingRule
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 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.

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the funding opportunity.
`FundingOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** 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

Field	Details
`IsParticipantActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the funding opportunity participant is currently active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the funding opportunity participant.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the funding opportunity. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup

Field	Details
	Refers To Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant role associated with the funding opportunity 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.

FundingOppParticipantFeed
Feed tracking is available for the object.

FundingOppParticipantHistory
History is available for tracked fields of the object.

GenericVisitTask

Represents information about a task that can be performed during a visit.

Supported Calls

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

Fields

Field	Details
`DefinitionReferenceId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The definition record associated with the runtime record. The value is null when the definition record is created. This field is a relationship field. **Relationship Name** DefinitionReference **Relationship Type** Lookup **Refers To** GenericVisitTask
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the task.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the visit task.
`IsDefinition`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record is a definition record. The default value is `false`.
`IsRequired`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a task must be completed to complete a visit. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the generic visit task.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the generic visit task record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
`Sequence`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence in which the visit task can be performed.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date and time of the visit task.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies the status of the generic visit task. Possible values are: • `Completed` • `In Progress` • `Is Defined` • `Not Started` The default value is `Is Defined`.
`StatusCode`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** Specifies the status code of the generic visit task. Possible values are: • `Completed` • `InProgress`— In Progress • `IsDefined`— Is Defined • `NotStarted`— Not Started The default value is `IsDefined`.

Field	Details
`VisitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The visit associated with the record. This field is a relationship field. **Relationship Name** Visit **Relationship Type** Lookup **Refers To** Visit

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.

GenericVisitTaskChangeEvent
Change events are available for the object.

GenericVisitTaskFeed
Feed tracking is available for the object.

GenericVisitTaskHistory
History is available for tracked fields of the object.

GenericVisitTaskOwnerSharingRule
Sharing rules are available for the object.

GenericVisitTaskShare
Sharing is available for the object.

GenericVisitTaskContext

Represents the context or purpose for a generic visit task.

Supported Calls

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

Fields

Field	Details
ContextId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the record that's taken as the context for the visit task. For example, if a key performance indicator is recorded for a warranty of an asset, the Asset and the Warranty records are the contexts of the visit task. This field is a polymorphic relationship field. **Relationship Name** Context **Relationship Type** Lookup **Refers To** Account, Account__c, AcctMgrTarget, AdvAccountForecastFact, AdvAcctForecastSetPartner, AdvAcctForecastSetUse, Assessment, AssessmentIndicatorDefinition, AssessmentQuestion, AssessmentQuestionAssignment, AssessmentQuestionResponse, AssessmentQuestionSet, AssessmentQuestionVersion, AssessmentTask, AssessmentTaskContentDocument, AssessmentTaskDefinition, Asset, AssetAccountParticipant, AssetContactParticipant, AssetMilestone, AssetRelationship, AssetWarranty, BusinessMilestone, BusinessProfile, Case, CommSubscriptionConsent, Contact, ContactRequest, Contract, EngagementAttendee, EngagementInteraction, EngagementTopic, GenericVisitTask, GenericVisitTaskContext, GnrcVstKeyPerformanceInd, GnrcVstTaskContextRelation, Image, InfoAuthorizationRequest, Lead, LeadLineItem, LeadPreferredSeller, ListEmail, Location, ManufacturingProgram, MfgProgramCpntFrcstFact, MfgProgramForecastFact, MfgProgramVariantFrcstFact, MultipartyInfoAuthRequest, OmniProcessAsmtQuestionVer, Opportunity, OpportunityPreferredSeller, Order, Organization, PartyConsent, PartyRelationshipGroup, PersonLifeEvent, PgmRebateTypBnftMapping, ProcessException, Product2, ProductCatalog, ProductCategory, ProductItem, ProductRelatedMaterial, ProductRequest, ProductRequestLineItem, ProductTransfer, ProgramRebateTypPayoutSrc, ProgramRebateType, ProgramRebateTypeBenefit, ProgramRebateTypeFilter, ProgramRebateTypePayout, ProgramRebateTypeProduct, ProgramRebateTypeReference, PurchaseQuantityRule, RebateClaim, RebateMemberAggregateItem, RebateMemberProductAggregate, RebatePayment, RebatePayoutAdjustment, RebateProgram, RebateProgramMember, RebateProgramMemberPayout, RebateProgramPayoutPeriod, ReceivedDocument, RecordAlert, SalesAgreement, ServiceAppointment, ServiceResource, Shipment, ShipmentItem, Solution, Supplier, TagCategory, UnitOfMeasureConversion, Vehicle, VehicleDefinition, Visit, VisitedParty, WarrantyTerm, WorkOrder, WorkOrderLineItem
DefinitionReferenceId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The definition record associated with the runtime record. The value is null when the definition record is created. This field is a relationship field. **Relationship Name** DefinitionReference **Relationship Type** Lookup **Refers To** GenericVisitTaskContext
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the visit task context.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the visit task context in a visit.
`IsDefinition`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record is a definition record. The default value is `false`.
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the visit task context associated with the record is mandatory.

Field	Details
	The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Autogenerated unique identifier for the visit task context record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the visit task context record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The start date and time of the visit task context in a visit.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies the status of the visit task context. Possible values are: • `Completed` • `In Progress` • `Is Defined` • `Not Started` The default value is `Is Defined`.
`StatusCode`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** Specifies the status code of the visit task context. Possible values are: • `Completed` • `InProgress`—In Progress • `IsDefined`—Is Defined • `NotStarted`—Not Started The default value is `IsDefined`.
`VisitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The visit associated with the record. This field is a relationship field. **Relationship Name** Visit

Field	Details
	Relationship Type Lookup **Refers To** Visit

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.

GenericVisitTaskContextChangeEvent
Change events are available for the object.

GenericVisitTaskContextFeed
Feed tracking is available for the object.

GenericVisitTaskContextHistory
History is available for tracked fields of the object.

GenericVisitTaskContextOwnerSharingRule
Sharing rules are available for the object.

GenericVisitTaskContextShare
Sharing is available for 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.

Fields

Field	Details
`CompletionDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date when the goal is completed.
`CompletionPercentage`	**Type** percent **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** Indicates the progress made on the assigned goal in percentage.
`CustomGoalName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the goal assignment record.
`GoalAssigneeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The assigees associated with the goal assignment. This is a polymorphic relationship field. **Relationship Name** GoalAssignee **Relationship Type** Lookup **Refers To** Account, Contact

Field	Details
GoalDefinitionId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The goal definition associated with the goal assignment. This is a relationship field. **Relationship Name** GoalDefinition **Relationship Type** Lookup **Refers To** GoalDefinition
DescriptionCodeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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. **Relationship Name** DescriptionCode **Relationship Type** Lookup **Refers To** CodeSet, CodeSetBundle
GoalType	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Specifies if the goal applies to a group or an individual.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the goal assignment record.
`OwnerId`	**Type** 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 **Refers To** Group, User
`ParentRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The care plan or benefit assignment object associated with the goal assignment. This is a polymorphic relationship field. **Relationship Name** ParentRecord

Field	Details
	Relationship Type Lookup **Refers To** BenefitAssignment, CarePlan
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the priority of the goal assignment. Possible values are: • `High` • `Low` • `Medium`
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the assigned goal.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the assigned goal. Possible values are: • `Canceled` • `Completed` • `In Progress` • `Not Started` The default value is 'Not Started'.
`TargetCompletionDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	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 on page 826
Feed tracking is available for the object.

GoalAssignmentHistory on page 835
History is available for tracked fields of the object.

GoalAssignmentOwnerSharingRule on page 832
Sharing rules are available for the object.

GoalAssignmentShare on page 825
Sharing is available for the object.

GoalAssignmentDetail

Represents additional information associated with a goal assignment. 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 if care plans are enabled in your org. To access the object, you need the Care Plans Access permission set or the Care Plans permission set license.

Fields

Field	Details
`DetailCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The system-defined code that represents the addition information associated to a goal. This field is used to specify standardized goal outcomes as codes.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** DetailCode **Relationship Type** Lookup **Refers To** CodeSet, CodeSetBundle
`DetailRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference record that represents additional information associated with the goal assignment. This field is a polymorphic relationship field. **Relationship Name** DetailRecord **Relationship Type** Lookup **Refers To** CareBarrier
`GoalAssignmentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the associated goal assignment. This field is a relationship field. **Relationship Name** GoalAssignment **Relationship Type** Master-detail **Refers To** GoalAssignment (the master object)
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the goal assignment detail.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

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.

GoalAssignmentDetailFeed **on page 826**
Feed tracking is available for the object.

GoalAssignmentDetailHistory **on page 835**
History is available for tracked fields of the object.

GoalAssignmentDetailShare on page 825
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()`

Fields

Field	Details
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The category that the defined goal belongs to.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the defined goal.
`IsCustomGoalNameRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a custom goal name is required for a goal assignment related to the goal definition. The default value is `false`. This field is available from API version 63.0 and later.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The date and time when the record was last referenced.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time when the record was last viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the record.
`OwnerId`	**Type** 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** • Group • User
`ParentGoalId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This field is not used in Integrated Care Management. **Relationship Name** ParentGoal

Field	Details
	Relationship Type Lookup **Refers To** GoalDefinition
`Status`	**Type** 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: • `Active` • `Inactive` The default value is `Active`.
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of the defined goal. Possible values are: • `Individual`—Intermediate Goal • `Strategic`—Top Goal The default value is `Individual`.
`UsageType`	**Type** 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 **on page 826**
Feed tracking is available for the object.

GoalDefinitionHistory on page 835
History is available for tracked fields of the object.

GoalDefinitionShare on page 825
Sharing is available for the object.

GnrcVstKeyPerformanceInd

Represents the key performance indicators that can be recorded while performing a task during a visit. You can compare the expected and actual metric values with the key performance indicator records.

Supported Calls

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

Fields

Field	Details
`ActualBooleanValue`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The actual boolean value recorded by the visitor for a key performance indicator. Possible values are: • `False` • `True`
`ActualDateTimeValue`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual date and time value recorded by the visitor for a key performance indicator.
`ActualDecimalValue`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The actual decimal value recorded by the visitor for a key performance indicator.

Field	Details
`ActualIntegerValue`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The actual integer value recorded by the visitor for a key performance indicator.
`ActualStringValue`	**Type** textarea **Properties** Create, Nillable, Update **Description** The actual string value recorded by the visitor for a key performance indicator.
`AssessmentIndDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The assessment indicator definition associated with the record. This field is a relationship field. **Relationship Name** AssessmentIndDefinition **Relationship Type** Lookup **Refers To** AssessmentIndicatorDefinition
`DefinitionReferenceId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The definition record associated with the runtime record. The value is null when the definition record is created. This field is a relationship field. **Relationship Name** DefinitionReference **Relationship Type** Lookup

Field	Details
	Refers To GnrcVstKeyPerformanceInd
`ExpectedBooleanValue`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The expected boolean value defined by a manager for a key performance indicator. Possible values are: • `False` • `True`
`ExpectedDateTimeValue`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected date and time value defined by a manager for a key performance indicator.
`ExpectedDecimalValue`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected decimal value defined by a manager for a key performance indicator.
`ExpectedIntegerValue`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The expected integer value defined by a manager for a key performance indicator.
`ExpectedStringValue`	**Type** textarea **Properties** Create, Nillable, Update **Description** The expected string value defined by a manager for a key performance indicator.

Field	Details
`IsDefinition`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record is a definition (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Autogenerated unique identifier for the key performance indicator record.
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence in which the key performance indicator can be recorded.
`UnitOfMeasure`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The unit of measure associated with the key performance indicator. Possible values are: • `Kilogram` • `Litre` • `Pack` • `Unit` The default value is `Unit`.
`VisitTaskContextId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The visit task context associated with the record. This field is a relationship field. **Relationship Name** VisitTaskContext **Relationship Type** Lookup **Refers To** GenericVisitTaskContext

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.

GnrcVstKeyPerformanceIndChangeEvent
Change events are available for the object.

GnrcVstKeyPerformanceIndFeed
Feed tracking is available for the object.

GnrcVstKeyPerformanceIndHistory
History is available for tracked fields of the object.

GnrcVstKeyPerformanceIndOwnerSharingRule
Sharing rules are available for the object.

GnrcVstKeyPerformanceIndShare
Sharing is available for the object.

GnrcVstTaskContextRelation

Represents common attributes used for a visit task and a visit task context.

Supported Calls

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

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Autogenerated unique identifier for the visit task context relation record.
`VisitTaskContextId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The visit task context associated with the record. This field is a relationship field. **Relationship Name** VisitTaskContext

Field	Details
	Relationship Type Lookup **Refers To** GenericVisitTaskContext
`VisitTaskContextSequence`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence in which the visit task context that's associated with the record can be performed.
`VisitTaskId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The visit task associated with the record. This field is a relationship field. **Relationship Name** VisitTask **Relationship Type** Lookup **Refers To** GenericVisitTask

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.

GnrcVstTaskContextRelationChangeEvent
Change events are available for the object.

GnrcVstTaskContextRelationFeed
Feed tracking is available for the object.

GnrcVstTaskContextRelationHistory
History is available for tracked fields of the object.

GnrcVstTaskContextRelationOwnerSharingRule
Sharing rules are available for the object.

GnrcVstTaskContextRelationShare
Sharing is available for the object.

HealthcareFacility

Represents a healthcare facility and all its related details. These details may be physical, functional, geographic, or business details.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`AccountId`	**Type** Master-detail reference **Properties** Create, Filter, Group, Sort **Description** References the business account of the facility. **Referenced Objects** • Account
`AvailabilityExceptions`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The times when the facility is not available. Only non-standard time-offs are recorded in this field. **Examples** Facility time off because of a natural disaster.
`Description`	**Type** textarea

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The description of the service facility.
`IsAlwaysOpen`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the facility is open during all hours.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LicensedBedCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of licensed beds the facility has. Available only if View Healthcare Details is enabled under Provider Management Settings.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** References the location record representing the facility's geolocation.

Field	Details
	Referenced Objects • Location
`LocationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of the facility in terms of its physical structure. Possible values are: • `Building` • `Facility` • `House` • `ICU Ward`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the healthcare facility record.
`ParentHealthcareFacilityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent facility that the facility is a part of. **Examples** The hospital that an ER wing is a part of. **Referenced Objects** • HealthcareFacility
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The source system from where the record was brought into Salesforce.

Field	Details
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the record in its source system.
`SourceSystemModified`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the record was last modified in its source system.

Associated Objects

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

HealthcareFacilityChangeEvent on page 837 (API version 59.0)
Change events are available for the object.

HealthcareFacilityFeed on page 826
Feed tracking is available for the object.

HealthcareFacilityHistory on page 835
History is available for tracked fields of the object.

HealthcarePractitionerFacility

Represents the different locations in which a practitioner provides services.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`AvailabilityExceptions`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The times when the facility is not available. Only non-standard time-offs are recorded in this field.
`EffectiveFrom`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this practitioner facility is effective.
`EffectiveTo`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this practitioner facility is no longer effective.
`GenderRestriction`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether physician sees patients of a specific gender. Possible values are: • `Female` • `Male` • `Nonbinary`
`Has24x7Service`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the facility offers round-the-clock service.

Field	Details
	The default value is `false`.
`HealthcareFacilityId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The Healthcare facility associated with this healthcare practitioner facility. **Relationship Type** Lookup **Refers To** HealthcareFacility
`HealthcareProviderId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Healthcare provider associated with this healthcare practitioner facility. This is a relationship field. **Relationship Type** Lookup **Refers To** HealthcareProvider
`HighestValidAge`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The highest age of patients that the practitioner sees at this facility
`InitialStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the practitioner started at this facility.
`IsActive`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
`IsDirectoryPrint`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether this facility is displayed in an online or printed directory. Available only if View Healthcare Details is enabled under Provider Management Settings.
`IsPrimaryCarePhysician`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the practitioner provides primary care services at this facility. Available only if View Healthcare Details is enabled under Provider Management Settings.
`IsPrimaryFacility`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the facility is the primary facility for the practitioner.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LowestValidAge`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lowest age of patients that the practitioner sees at this facility.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the practitioner facility record.
`OperatingHoursId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies the operating hours for this practitioner at this facility. This is a relationship field. **Relationship Name** OperatingHours **Relationship Type** Lookup **Refers To** OperatingHours
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record. This is a polymorphic relationship field. **Relationship Name** Owner

Field	Details
	Relationship Type Lookup **Refers To** Group, User
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** System from which the record was sourced.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID of an external record on its source system.
`SsaCountyCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Social Security Administration identifier for the county.
`TerminationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the practitioner stopped working at this facility.
`TerminationReason`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reason the practitioner facility is no longer current. Possible values are: • `Facility Closed`

Field	Details
	• `Left Organization`
`TerminationRequestedById`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the person or organization requesting the termination. This field is a relationship field. **Relationship Name** TerminationRequestedBy **Relationship Type** Lookup **Refers To** User

Associated Objects

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

HealthcarePractitionerFacilityFeed on page 826
Feed tracking is available for the object.

HealthcarePractitionerFacilityHistory on page 835
History is available for tracked fields of the object.

HealthcarePractitionerFacilityOwnerSharingRule on page 832
Sharing rules are available for the object.

HealthcarePractitionerFacilityShare on page 825
Sharing is available for the object.

HealthcareProvider

Represents business-level details about the provider organization or the practitioner.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Account that this healthcare provider is associated with. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`CaqhIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Provider's unique ID assigned by the Council for Affordable Quality Healthcare (CAQH). Available only if View Healthcare Details is enabled under Provider Management Settings.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the service provider.
`EffectiveFrom`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date from which this provider is effective.
`EffectiveTo`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this provider is no longer effective.
`EhrSystem`	**Type** textarea **Properties** Create, Nillable, Update **Description** Name of the EHR system used at this facility or organization. Available only if View Healthcare Details is enabled under Provider Management Settings.
`InitialStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date that the facility first became operational or the practitioner first started practicing.
`IsNotSearchable`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Exclude this provider from search results. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. Name of the provider.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Required. The ID of the user who owns this record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
PractitionerId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Practitioner that this healthcare provider record is associated with. This field is a relationship field. **Relationship Name** Practitioner **Relationship Type** Lookup

Field	Details
	Refers To Contact
`ProviderClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Class of facility, such as a provider organization, provider employee, or individual provider. Possible values are: • `Individual Provider` • `Provider Employee` • `Provider Org`
`ProviderPhotoId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Content Document file that is a photo of the Healthcare Provider. This field is a relationship field. This field is a relationship field. **Relationship Name** ProviderPhoto **Relationship Type** Lookup **Refers To** ContentDocument
`ProviderType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of provider or facility. Possible values are: • `At Home Service Provider` • `Hospital` • `Medical Doctor` • `Onsite Service Provider`

Field	Details
	• `Transportation Service Provider` • `Virtual Service Provider`
`ReferredByContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Provider that originated the referral. This field is a relationship field. **Relationship Name** ReferredByContact **Relationship Type** Lookup **Refers To** Contact
`RelatedUserId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The User record that relates to the Healthcare Provider record. This field is a relationship field. This field is a relationship field. **Relationship Name** RelatedUser **Relationship Type** Lookup **Refers To** User
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** System from which the record was sourced.
`SourceSystemIdentifier`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID of the system from which the record was sourced.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Current status of the provider. Possible values are: • `Active` • `Inactive` • `Pending`
`TerminationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Termination date for this provider.
`TerminationReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reason for termination.
`TotalLicensedBeds`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Total number of licensed beds at this facility, if applicable. Available only if View Healthcare Details is enabled under Provider Management Settings.

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.

HealthcareProviderChangeEvent on page 837 (API version 59.0)
Change events are available for the object.

HealthcareProviderFeed on page 826
Feed tracking is available for the object.

HealthcareProviderHistory on page 835
History is available for tracked fields of the object.

HealthcareProviderOwnerSharingRule on page 832
Sharing rules are available for the object.

HealthcareProviderShare on page 825
Sharing is available for the object.

HealthcareProviderNpi

Represents identifiers from the National Provider Identifier that are assigned to every facility and licensed practitioner in the United States. Also includes NPI assigned date, primary mailing address on file, and so on.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the facility that this NPI belongs to.
`EffectiveFrom`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this NPI is effective.
`EffectiveTo`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this NPI is no longer effective.
`HealthcareProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The healthcare provider delivering services to the constituent. This field is a relationship field. **Relationship Name** HealthcareProvider **Relationship Type** Lookup **Refers To** HealthcareProvider
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Practitioner or facility name as listed in the NPI database.
Npi	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Ten-digit identifier for a provider from the National Plan and Provider Enumeration System.
NpiType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifies whether the NPI is for an individual or an organization.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
PractitionerId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Name of the practitioner that this NPI belongs to.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** System from which the record was sourced.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the system from which the record was sourced.

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.

HealthcareProviderNpiChangeEvent (API version 60.0)
Change events are available for the object.

HealthcareProviderNpiFeed
Feed tracking is available for the object.

HealthcareProviderNpiHistory
History is available for tracked fields of the object.

HealthcareProviderNpiOwnerSharingRule
Sharing rules are available for the object.

HealthcareProviderNpiShare
Sharing is available for the object.

HealthcareProviderSpecialty

Represents specialties for a practitioner or a provider service organization. A provider can have multiple specialties such as `anesthesiology` and `cardiovascular`.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
`EffectiveFrom`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date from which this provider specialty is effective.
`EffectiveTo`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which this provider specialty is no longer effective.
`HealthcareProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The healthcare provider delivering services to the constituent. This field is a relationship field. **Relationship Name** HealthcareProvider **Relationship Type** Lookup **Refers To** HealthcareProvider
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the record is active.
IsPrimarySpecialty	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the specialty is the provider's primary specialty.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the provider's specialty.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record. This is a polymorphic relationship field. **Relationship Name** Owner

Field	Details
	Relationship Type Lookup **Refers To** Group, User
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** System from which the record was sourced.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** ID of an external record on its source system.
`SpecialtyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Care specialty record associated with the provider. This is a relationship field. **Relationship Name** Specialty **Relationship Type** Lookup **Refers To** CareSpecialty
`SpecialtyRole`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Role of the specialty for the provider or practitioner.

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.

HealthcareProviderSpecialtyChangeEvent on page 837 (API version 59.0)
Change events are available for the object.

HealthcareProviderSpecialtyFeed on page 826
Feed tracking is available for the object.

HealthcareProviderSpecialtyHistory on page 835
History is available for tracked fields of the object.

HealthcareProviderSpecialtyOwnerSharingRule on page 832
Sharing rules are available for the object.

HealthcareProviderSpecialtyShare on page 825
Sharing is available for 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()`

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the applicant's account. This is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account

Field	Details
ApplicationCaseId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of a case that relates to this application. This is a relationship field. **Relationship Name** ApplicationCase **Relationship Type** Lookup **Refers To** Case
ApplicationChangeOverview	**Type** textarea **Properties** Create, Nillable, Update **Description** 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 **Properties** 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.
ApplicationOverview	**Type** textarea **Properties** Create, Nillable, Update **Description** 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.

Field	Details
`ApplicationReferenceNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the application. Possible values are: • `Change Of Circumstance`—Available in API versions 62.0 and later with Public Sector Solutions. • `ChangeOfCircumstance`—Available in API versions 60.0 and 61.0 with Public Sector Solutions. • `New` • `Recertification`—Available in API version 60.0 and later with Public Sector Solutions. • `Renewal`
`AppliedDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date on which the application was received from the applicant.
`ApprovedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the application was approved.
`BudgetId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The service category of the application. Possible values are: • `License` • `Permit` • `Grant Application` • `Letter of Intent`
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact associated with the individual application. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text description provided by the applicant.
`FundingOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** textarea **Properties** 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.
`InternalStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the individual application in Salesforce CRM. Available in API version 57.0 and later. Possible values are:

Field	Details
	• Invited • In Progress • Submitted • Application Accepted • Revision Requested • In Review • Approved • Denied
IsOwnerEditable	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Whether the owner ID of this record can be changed. The default value is 'false'.
IsSubmitted	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** 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.

Field	Details
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The auto-generated unique ID for this application.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user that owns this record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record associated to the application. This is a relationship field. **Relationship Name** RecordType **Relationship Type** Lookup **Refers To** RecordType
RequestedAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description 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`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the applicant fulfilled all the requirements for approval.
`SavedApplicationRefId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Reference Id of the saved application. This is a relationship field. **Relationship Name** SavedApplicationRef **Relationship Type** Lookup **Refers To** PreliminaryApplicationRef
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The submission and approval status of the application. Possible values are: • `Invited` • `In Progress` • `Submitted` • `Application Accepted` • `Revision Requested` • `In Review` • `Approved`

Field	Details
	• `Denied`
`WasReturned`	**Type** 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 on page 837 (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.

IndividualApplicationShare
Sharing is available for the object.

IndividualApplicationTask

Represents a task related to an application. This object is available in the 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 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.

Fields

Field	Details
ApplicationStageDefinitionId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the individual application task must be completed.
EndDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date and time when the individual application task ends.
`IndividualApplicationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual application associated with the individual application task. This field is a relationship field. **Relationship Name** IndividualApplication **Relationship Type** Lookup **Refers To** IndividualApplication
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the individual application task is required (`true`) or not (`false`). The default value is `false`.
`IsSubmitted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the individual application task has been submitted. The default value is `false`.
`LastReferencedDate`	**Type** 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.

Field	Details
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the individual application task.
`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
`PreliminaryApplicationRefId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent funding award for this funding award. This field is a relationship field. **Relationship Name** PreliminaryApplicationRef **Relationship Type** Lookup

Field	Details
	Refers To PreliminaryApplicationRef
`SavedApplicationUrl`	**Type** url **Properties** Create, Filter, Nillable, Sort, Update **Description** The URL of a saved application that's associated with the individual application task.
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence in which the individual application task must be performed.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the individual application task starts.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the individual application task. Possible values are: • `Cancelled` • `Completed` • `In Progress` • `Not Started`
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description 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.

IndividualApplicationTaskShare
Sharing is available for the object.

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.

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 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.

Fields

Field	Details
`Comments`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the individual application.
`IndividualApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The individual application associated with the individual application participant. This field is a relationship field. **Relationship Name** IndividualApplication **Relationship Type** Master-Detail **Refers To** IndividualApplication
`IsParticipantActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the individual application participant is currently active (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.

Field	Details
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the individual application participant.
ParticipantId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the individual application. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Group, User
ParticipantRoleId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant role associated with the individual application 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.

IndividualAppInParticipantFeed
Feed tracking is available for the object.

IndividualAppInParticipantHistory
History is available for tracked fields of the object.

InspectionAssessmentInd

Represents the assessment indicators recorded during an inspection. 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
`AssessmentIndDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the assessment indicator definition.
`AssessmentTaskId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Id of the assessment task.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the inspection assessment indicator.
`Result`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Compliance result of the assessment indicator. Possible values are: • Fail • Issue • Pass
`TextFieldResponse`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text response of the assessment indicator
`DateTimeFieldResponse`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the response for an assessment indicator is captured during an inspection visit. This field is available in API version 52.0 and later.
`DecimalFieldResponse`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The fractional value of the assessment indicator response that was captured during an inspection visit. This field is available in API version 52.0 and later.
`DisplayOrder`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The order in which the assessment indicator definition associated with the inspection assessment indicator is displayed in the assessment task definition. This field is available in API version 52.0 and later.
`NumberFieldResponse`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The whole number value of the assessment indicator response that was captured during an inspection visit. This field is available in API version 52.0 and later.
`PercentageFieldResponse`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage value of the assessment indicator response that was captured during an inspection visit. This field is available in API version 52.0 and later.

Associated Objects

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

InspectionAssessmentIndFeed
Feed tracking is available for the object.

InspectionAssessmentIndHistory
History is available for the object.

InspectionType

Represents the type of inspections related to a permit or license. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the inspeciton type.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the inspeciton type.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of the inspection type.

Associated Objects

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

InspectionTypeOwnerSharingRule
Sharing rules are available for the object.

InspectionTypeShare
Share is available for the object.

InspectionTypeFeed **on page 826**
Feed is available for the object.

InspectionTypeHistory **on page 835**
History is available for the object.

InsurancePolicy

Represents a type of insurance policy. 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

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

Fields

Field	Details
`AuditTerm`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the audit. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.
`BillingCarrierAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The name of the Billing Carrier Account associated with the Insurance Policy. When the company that sells the policy also writes the policy, then the billing carrier is the same as the writing carrier. This field is a relationship field. **Relationship Name** BillingCarrierAccount **Relationship Type** Lookup **Refers To** Account
`CancellationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the insurance policy was canceled.
`CancellationReason`	**Type** textarea **Properties** Create, Nillable, Update **Description** The reason for canceling the insurance policy.
`CancellationReasonType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category that the cancellation reason belongs to.
`CashSurrenderValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The cash surrender value of the insurance policy.

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

Field	Details
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the policy expires.
`FinalRenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The final date on which the policyholder can renew the insurance policy.
`GrossWrittenPremium`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total expected premium amount for the insurance policy over the policy period.
`HasAnyAutoCoverage`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the insurance policy has an Any Auto coverage, which extends the coverage to hired and other non-owned vehicles. The default value is False. The default value is `false`.
`IntermediaryAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Intermediary Account associated with the Insurance Policy. This field is a relationship field. **Relationship Name** IntermediaryAccount **Relationship Type** Lookup

Field	Details
	Refers To Account
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the policy is active. Creating or updating an InsurancePolicy sets `IsActive` automatically based on the `Status` field value. For example, you can set `IsActive` to False by setting `Status` to Inactive. The default value is `false`.
`IsLoanEligibile`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a loan can be requested against the insurance policy. The default value is `false`.
`IsPolicyEditLocked`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application locks the policy record. The default value is `false`.
`IsRenewedPolicy`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the policy is a renewed policy. The default value is `false`.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The insurance policy number.
`NameInsuredId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The name of the primary insured. This field is a relationship field. **Relationship Name** NameInsured **Relationship Type** Lookup **Refers To** Account
`OriginalEffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the original policy went into effect.

Field	Details
`OriginalExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Expiration date of the original policy.
`OriginalPolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the original insurance policy. This field is a relationship field. **Relationship Name** OriginalPolicy **Relationship Type** Lookup **Refers To** InsurancePolicy
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PaidToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date up to which the policy is paid for.

Field	Details
ParentPolicyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the parent policy that covers this policy. This field is a relationship field. **Relationship Name** ParentPolicy **Relationship Type** Lookup **Refers To** InsurancePolicy
PastDueAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount past due for the policy.
PaymentDueDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The due date for the next payment of the premium.
PlanTier	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The class that the insurance policy belongs to. For example, silver, gold, or platinum.
PlanType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The type of the insurance policy plan. For example, single life, joint last-to-die, or joint first-to-die (primarily applicable for term insurance).
`PolicyDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the insurance policy.
`PolicyName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the insurance policy.
`PolicyTerm`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The time period for which the policy provides coverage.
`PolicyType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of the insurance policy. For example, home, auto, annuity, or life.
`PremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium paid by the policy owner for the current billing period.
`PremiumCalculationMethod`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The premium calculation method for a payment period.
`PremiumFrequency`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The frequency of the premium payment or billing. For example, monthly, semi-monthly, quarterly, semi-annually, or annually.
`PremiumPaymentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of premium payment, such as Advance or Arrears.
`PreviousPremium`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium of the policy before it was renewed.
`PreviousRenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The most recent renewal date for the insurance policy.
`PriorPolicyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the insurance policy before it was renewed. This field is a relationship field.

Field	Details
	Relationship Name PriorPolicy **Relationship Type** Lookup **Refers To** InsurancePolicy
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product that this policy belongs to. For example, if the customer buys a silver auto policy, this field looks up to the silver auto product in the Product object. This field is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2
`RatingDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date to determine the rating details on a mid-term adjustment, endorsement, or out-of-sequence endorsement to a policy.
`ReferencePolicyNumber`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The reference number of the insurance policy that is renewed when the policy term tracking is continued across multiple policy versions. For example, if a limit is a "Lifetime Limit", then the policy term tracking is tracked across all versions of the policy.
`RenewalChannel`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The channel used to renew the insurance policy. For example, phone or web.
`RenewalDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The next expected policy renewal date. The actual renewal date may be different.
`SaleDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the policy was sold.
`ServicingOffice`	**Type** address **Properties** Filter, Nillable **Description** The address of the office that issued the policy and that services the policy. This is a compound field of type Address and combines these fields: ServicingOfficeCity, ServicingOfficeCountry, ServicingOfficeGeocodeAccuracy, ServicingOfficeLatitude, ServicingOfficeLongitude, ServicingOfficePostalCode, ServicingOfficeState, and ServicingOfficeStreet. For more information, see Address Compound Fields.
`SourceOpportunityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the opportunity from which the policy was created. This field is a relationship field. **Relationship Name** SourceOpportunity **Relationship Type** Lookup

Field	Details
	Refers To Opportunity
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique ID of this record in the source system.
`StandardFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period.
`StandardPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period.
`StandardTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The status of the insurance policy.
`Substatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The carrier system's substatus code for the insurance policy.
`TaxesSurcharges`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The taxes and surcharges levied on the premium for the insurance policy.
`TermFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected fee for the policy over the policy period, prorated based on the policy's effective dates.
`TermPremiumAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected premium for the policy over the policy period, prorated based on the policy's effective dates.
`TermTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The expected tax on the policy over the policy period, prorated based on the policy's effective dates.

Field	Details
TotalCommissionAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total commission amount for the policy.
TotalSumInsured	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total insured amount.
TotalTermFeeAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current total term fees of all policy versions.
TotalTermPremiumAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current total term premium of all policy versions.
TotalTermTaxAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The current total term taxes of all policy versions.
UnderwritingEntityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Legal entity that underwrote the insurance policy.

Field	Details
	This field is a relationship field. **Relationship Name** UnderwritingEntity **Relationship Type** Lookup **Refers To** LegalEntity
`UniversalPolicyNumber`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** A number that uniquely identifies the policy across different source systems.
`WritingCarrierAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Writing Carrier Account associated with the Insurance Policy. This field is a relationship field. **Relationship Name** WritingCarrierAccount **Relationship Type** Lookup **Refers To** Account

Associated Objects

This object has the following associated objects. 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.

InsurancePolicyChangeEvent on page 837 (API version 61.0)
Change events are available for the object.

InsurancePolicyFeed on page 826
Feed tracking is available for the object.

InsurancePolicyHistory on page 835
History is available for tracked fields of the object.

InsurancePolicyOwnerSharingRule on page 832
Sharing rules are available for the object.

InsurancePolicyShare on page 825
Sharing is available for the object.

InsurancePolicyTransaction

Represents a transaction related to a change that affects the premium of an insurance policy, such as an endorsement, renewal, or cancellation. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

Fields

Field	Details
`InsurancePolicyId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The insurance policy this transaction is related to. This field is a relationship field. **Relationship Name** InsurancePolicy **Relationship Type** Lookup **Refers To** InsurancePolicy
`InsurancePolicyVersionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The current version of the insurance policy. This field is a relationship field. **Relationship Name** InsurancePolicyVersion **Relationship Type** Lookup **Refers To** InsurancePolicy
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the transaction.
`ParentTransactionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The transaction this insurance policy transaction is related to. For example, a charge transaction is the parent transaction for a payment made against that charge. This field is a relationship field.

Field	Details
	Relationship Name ParentTransaction **Relationship Type** Lookup **Refers To** InsurancePolicyTransaction
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current status of a policy transaction. Possible values are: • `Approved` • `Pending` • `Rejected` • `Reversed`
`TotalTransactionAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The total amount of transaction, including transaction fee and tax. This field is a calculated field.
`TransactionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The transaction amount.
`TransactionEffectiveDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date of the transaction.

Field	Details
`TransactionFeeAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The prorated fee for the transaction.
`TransactionNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** An identifier for the transaction from an external system.
`TransactionPostedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the amount was charged to the customer.
`TransactionTaxAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The prorated tax on the transaction amount.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of transaction. Possible values are: • `Cancellation` • `Credit` • `Deposit` • `Endorsement` • `Loan` • `Premium Payment`

Field	Details
	• `Renewal` • `Surcharge` • `Surrender` • `Withdrawal`

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.

InsurancePolicyTransactionFeed on page 826
Feed tracking is available for the object.

InsurancePolicyTransactionHistory on page 835
History is available for tracked fields of the object.

IntakeFormSection

Represents a section of an intake form such as a job application, a complaint, or a referral. 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()`

Special Access Rules

This object is available if Talent Recruitment Management, Case Referrals, or Complaint Management is enabled in your org. To access the object, you need one of these permission sets.

Feature	User Type	Permission Set
Talent Recruitment Management	Internal Users	Talent Recruitment Management Specialist Access
	Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
	Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Feature	User Type	Permission Set
Case Referrals	Internal Users	Case Referral
	Customer and Partner Community Users	Composable Case Management Community Access
Complaint Management	Internal Users	Complaints Management Access
	Customer and Partner Community Users	Composable Case Management Community Access

Fields

Field	Details
`ApplicationStageDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The application stage definition associated with the intake form section. This field is a relationship field. **Relationship Name** ApplicationStageDefinition **Refers To** ApplicationStageDefinition
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the intake form section.
`DueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the intake form section must be completed.
`EndDateTime`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The end date and time of the intake form section.
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the intake form section is required (true) or not (false). The default value is `false`.
`IsSubmitted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the intake form section is submitted (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the intake form section.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
PreliminaryApplicationRefId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the preliminary application reference associated with the intake form section. This field is a relationship field. **Relationship Name** PreliminaryApplicationRef **Refers To** PreliminaryApplicationRef
ReferenceRecordId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the record that the intake form section is associated with. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Refers To** ApplicationForm, PublicComplaint, Referral
SavedApplicationUrl	**Type** url

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The URL of the saved application that's associated with the intake form section.
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence number for the intake form section.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date and time of the intake form section.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the intake form section.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of the intake form section. Possible values are: • `Application` • `Complaint` • `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.

IntakeFormSectionFeed on page 826
Feed tracking is available for the object.

IntakeFormSectionHistory on page 835
History is available for tracked fields of the object.

IntakeFormSectionOwnerSharingRule on page 832
Sharing rules are available for the object.

IntakeFormSectionShare on page 825
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()`

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the customer or partner who attended the interaction. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`Description`	**Type** textarea

Field	Details
	Properties Create, Nillable, Update **Description** The description of the interaction.
`EndTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time that the interaction ended.
`InteractionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of interaction. Possible values are: • `Conference` • `Email` • `In Person` • `Phone Call`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastSyncedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location of the interaction. **Relationship Name** Location **Relationship Type** Lookup **Refers To** Location
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the interaction.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ReferenceIdentifier`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique reference ID of the interaction.
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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
`StartTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time that the interaction started.

Associated Objects

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

InteractionFeed on page 826
Feed tracking is available for the object.

InteractionHistory on page 835
History is available for tracked fields of the object.

InteractionOwnerSharingRule on page 832
Sharing rules are available for the object.

InteractionShare on page 825
Sharing is available for the object.

InteractionAttendee

Represents an attendee of an interaction.

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
`AttendeeResponse`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the response of the attendee to the interaction. Possible values are: • `Accepted` • `Declined` • `Awaiting Response`
`AttendeeType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of attendee. Possible values are: • `External` • `Internal`
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The contact who attended the interaction.

Field	Details
	Relationship Name Contact **Relationship Type** Lookup **Refers To** Contact
`EmailAddress`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the attendee.
`EventId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The event on Salesforce calendar for this attendee. **Relationship Name** Event **Relationship Type** Lookup **Refers To** Event
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The interaction for which this attendee record is created. **Relationship Name** Interaction **Relationship Type** Master-Detail **Refers To** Interaction

Field	Details
`IsOrganizer`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the attendee is the interaction organizer (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastSyncedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when a sync was performed to create or update an interaction from an email client or other solutions in Salesforce.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the interaction attendee.
`UserId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The user who attended the interaction.

Associated Objects

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

InteractionAttendeeFeed on page 826
Feed tracking is available for the object.

InteractionAttendeeHistory on page 835
History is available for tracked fields of the object.

InteractionRelatedAccount

Represents a junction between an interaction and account that's related to that interaction.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account of a company that's associated with the interaction. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account

Field	Details
`AccountRole`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the role of the account in the interaction. Possible values are: • `Audit` • `Legal` • `Participating` • `Primary`
`Comment`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description about the account that's associated with the interaction.
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The interaction associated with the account. This field is a relationship field. **Relationship Name** Interaction **Relationship Type** Lookup **Refers To** Interaction
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

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

Associated Objects

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

InteractionRelatedAccountFeed on page 826
Feed tracking is available for the object.

InteractionRelatedAccountHistory on page 835
History is available for tracked fields of 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	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description Notes about the account that's associated with the interaction summary.
DiscussedAccountId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The company or organization mentioned in the interaction summary. This is a relationship field. **Relationship Name** DiscussedAccount **Relationship Type** Lookup **Refers To** Account
InteractionSummaryId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** 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
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the interaction summary account.

Associated Objects

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

InteractionSumDiscussedAccountFeed on page 826
Feed tracking is available for the object.

InteractionSumDiscussedAccountHistory on page 835
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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the customer who attended the client interaction.

Field	Details
	Relationship Name Account **Relationship Type** Lookup **Refers To** Account
`ConfidentialityType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the level of confidentiality of the information that's recorded in this interaction summary. Possible values are: • `Confidential` • `Public`
`InteractionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The client interaction related to the interaction summary. **Relationship Name** Interaction **Relationship Type** Lookup **Refers To** Interaction
`InteractionPurpose`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the purpose of the client interaction. Possible values are: • `Deal Execution` • `Meet and Greet`

Field	Details
	• `Quarterly Check-In`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`MeetingNotes`	**Type** textarea **Properties** Create, Nillable, Update **Description** The detailed record of what transpired during the client interaction.
`MeetingNotesStatus`	**Type** 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`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The title of the interaction summary, capturing the summary of the interaction.

Field	Details
NextSteps	**Type** textarea **Properties** Create, Nillable, Update **Description** The next steps that were decided during the interaction.
Offering	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** The offerings that were discussed in the client interaction. Possible values are: • Debt Capital Markets • Equity Capital Markets • Mergers and Acquisitions Advisory
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
PartnerAccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account related to the partner who attended the client interaction. **Relationship Name** Partner Account

Field	Details
	Relationship Type Lookup **Refers To** Account
`RelatedRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the record such as an opportunity associated with a client interaction. This is a polymorphic relationship field. **Relationship Name** RelatedRecord **Relationship Type** Lookup **Refers To** • Application Form - Available in API version 62.0 and later • Benefit Assignment • Care Plan • Case • Case Participant • Contact • Complaint Participant • Goal Assignment • Opportunity • Public Complaint • Referral • Service Appointment • Visit
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the interaction summary. Possible values are: • `Draft`

Field	Details
	• `Published`

Associated Objects

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

InteractionSummaryFeed on page 826
Feed tracking is available for the object.

InteractionSummaryHistory on page 835
History is available for tracked fields of the object.

InteractionSummaryOwnerSharingRule on page 832
Sharing rules are available for the object.

InteractionSummaryShare on page 825
Sharing is available for the object.

JobAppInSearchableField

Represents searchable data for job applications, enabling criteria-based search and filtering to find applications that match the user-specific criteria. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the job applicant's account. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.Account.Id`. This field is a relationship field. **Relationship Name** Account **Refers To** Account
`ApplicantEmail`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the job applicant. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.Account.PartyProfile.PrimaryEmail`.
`ApplicantExperience`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The total work experience of the job applicant. The Data Processing Engine definition Aggregate Job Application Details for Search calculates the total work experience by adding the `Tenure` values in the `ApplicationForm.Account.PersonEmployment` records. Possible values are: • `EightToTwelve`—8 to 12 • `FifteenPlus`—15+ • `TwelveToFifteen`—12 to 15 • `ZeroToThree`—3 to 8

Field	Details
`ApplicantName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the job applicant. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.Account.Name`.
`ApplicantQualification`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A list of qualifications held by the job applicant. The Data Processing Engine definition Aggregate Job Application Details for Search creates the list from the `Degree` values in the `ApplicationForm.Account.PersonEducation` records.
`ApplicationFormId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The application form associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.Id`. This field is a relationship field. **Relationship Name** ApplicationForm **Refers To** ApplicationForm
`ApplicationFormName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the application form associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.Name`.

Field	Details
`ApplicationFormStage`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The stage in the approval process of the application form associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.Stage`.
`AppliedDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the job application was submitted. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.SubmissionDate`.
`CandidateSourceKey`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique key of the recruitment portal where the job application was submitted. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.RecruitmentPosting.CandidateSourceKey`.
`EmploymentOfferStatus`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the employment offer associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.EmploymentOffer.Status`.
`Geolocation`	**Type** location **Properties** Nillable

Field	Details
	Description The geolocation of the applied job position.
GeolocationLatitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The latitude of the applied job position's geolocation. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.JobPstrRecruitmentRqs.JobPosition.Location.Latitude`
GeolocationLongitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The longitude of the the applied job position's geolocation. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.JobPstrRecruitmentRqs.JobPosition.Location.Longitude`
JobPositionId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The job position associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.JobPstrRecruitmentRqs.JobPosition.Id` This field is a relationship field. **Relationship Name** JobPosition **Refers To** JobPosition
JobPositionName	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The name of the job position associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.JobPstnRecruitmentRqs.JobPosition.Name`
`LastEvaluationDecision`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The decision of the latest application form evaluation associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormEvaluation.Decision`.
`LastEvaluationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The latest application form evaluation associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormEvaluation.Id`. This field is a relationship field. **Relationship Name** LastEvaluation **Refers To** ApplicationFormEvaluation
`LastEvaluationName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the latest application form evaluation associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormEvaluation.Name`.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of location associated with the applied job position. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.JobPstrRecruitmentRqs.JobPosition.Location.Id` This field is a relationship field. **Relationship Name** Location **Refers To** Location
`LocationName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the applied job position's location. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.JobPstrRecruitmentRqs.JobPosition.Location.Name`

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the job application searchable field record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the job application searchable field record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`RecruitmentPostingId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The recruitment posting associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.RecruitmentPosting.Id` This field is a relationship field. **Relationship Name** RecruitmentPosting **Refers To** RecruitmentPosting
`RecruitmentPostingName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the recruitment posting associated with the job application.

Field	Details
	The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.RecruitmentPosting.Name`.
`RecruitmentRequisitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The recruitment requisition associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.Id`. This field is a relationship field. **Relationship Name** RecruitmentRequisition **Refers To** RecruitmentRequisition
`RequisitionIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the recruitment requisition associated with the job application. The Data Processing Engine definition Aggregate Job Application Details for Search maps this field to `ApplicationForm.ApplicationFormRelation.RecruitmentRequistion.Name`.

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.

JobAppInSearchableFieldOwnerSharingRule **on page 832**
Sharing rules are available for the object.

JobAppInSearchableFieldShare **on page 825**
Sharing is available for the object.

JobPosition

Represents an instance of employment in a particular position in the organization. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Code`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code for the job position.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the job position.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the job position.

Field	Details
`InternalOrganizationUnitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the internal organization unit associated with the job position. This field is a relationship field. **Relationship Name** InternalOrganizationUnit **Refers To** InternalOrganizationUnit
`LastFilledDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the job position was last filled. Available in API version 63.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the location associated with the job position.

Field	Details
	This field is a relationship field. **Relationship Name** Location **Refers To** Location
`ManagerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The manager for the job position. This field is a polymorphic relationship field. **Relationship Name** Manager **Refers To** Account, Employee2
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the job position.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`PositionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The ID of the position associated with the job position. This field is a relationship field. **Relationship Name** Position **Refers To** Position
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the job position.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the job position. Available in API version 63.0 and later.
`Title`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The title of the job position.

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.

JobPositionFeed on page 826
Feed tracking is available for the object.

JobPositionHistory on page 835
History is available for tracked fields of the object.

JobPositionShare on page 825
Sharing is available for the object.

JobPositionPayGrade

Represents a junction between a job position and a position pay grade. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`JobPositionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the job position associated with the job position pay grade. This field is a relationship field. **Relationship Name** JobPosition **Relationship Type** Master-detail **Refers To** JobPosition (the master object)

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the job position pay grade.
`PositionPayGradeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the position pay grade associated with the job position pay grade. This field is a relationship field. **Relationship Name** PositionPayGrade **Refers To** PositionPayGrade

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.

JobPositionPayGradeFeed **on page 826**
Feed tracking is available for the object.

JobPositionPayGradeHistory on page 835
History is available for tracked fields of the object.

JobPostingSearchableField

Object used for searching and Filtering published Job Postings. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`DepartmentName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the department that the job position is associated with. The Data Processing Engine definition Aggregate Job Possting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstrRecruitmentRqs.JobPosition.InternalOrganizationUnit.Name`
`EndDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date when the job position vacancies were removed from the portal. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.EndDate`.
`Geolocation`	**Type** location **Properties** Nillable **Description** The geolocation of the advertised job position.
`GeolocationLatitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The latitude of the advertised job position's geolocation. The Data Processing Engine definition Aggregate Job Possting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Location.Latitude`
`GeolocationLongitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The longitude of the advertised job position's geolocation. The Data Processing Engine definition Aggregate Job Possting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Location.Longitude`
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of location associated with the advertised job position.

Field	Details
	The Data Processing Engine definition Aggregate Job Possting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Location.Id` This field is a relationship field. **Relationship Name** Location **Refers To** Location
`LocationName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the advertised job position's location. The Data Processing Engine definition Aggregate Job Possting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Location.Name`.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the job posting searchable field record.
`OccupationGroupId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The occupation group that the position is associated with. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.Occupation.OccupationGroup.Id` This field is a relationship field. **Relationship Name** OccupationGroup **Refers To** OccupationGroup

Field	Details
OccupationGroupName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the occupation group that the position is associated with. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.Occupation.OccupationGroup.Name`
OccupationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The occupation that the position is associated with. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.Occupation.Id` This field is a relationship field. **Relationship Name** Occupation **Refers To** Occupation
OccupationName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the occupation that the position is associated with. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.Occupation.Name`
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the job posting searchable field record owner.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`PayRange`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The pay range for the advertised job position. The Data Processing Engine definition Aggregate Job Posting Details for Search determines the pay range from the `Maximum Salary` and `Minimum Salary` values in the `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.PositionPayGrade.PayGrade` record. Possible values are: • `Frtykto70k`—40,000 to 70,000 • `Lessthan25k`—Less than 25,000 • `Morethan100k`—Greater than 100,000 • `Svntykto100k`—70,000 to 100,000 • `Twnty5kto40k`—25,000 to 40,000
`PositionDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the advertised job position. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.Description`
`PositionSensitivity`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The sensitivity of the position.

Field	Details
	The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.Sensitivity`.
`PositionStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the position associated with the advertised job position. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.Status`.
`PositionTitle`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The title of the advertised job position. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.ExternalVacancyTitle`.
`PositionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of the position associated with the advertised job position. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstnRecruitmentRqs.JobPosition.Position.Type`.
`RecruitmentPostingId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The recruitment posting that advertised the vacancies in the job position. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.Id`.

Field	Details
	This field is a relationship field. **Relationship Name** RecruitmentPosting **Refers To** RecruitmentPosting
`RecruitmentPostingName`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The name of the recruitment posting that advertised the vacancies in the job position. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.Name`.
`RecruitmentRequisitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The recruitment requisition associated with the recruitment posting. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.Id`. This field is a relationship field. **Relationship Name** RecruitmentRequisition **Refers To** RecruitmentRequisition
`RequisitionIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the recruitment requisition associated with the recruitment posting. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.Name`.
`StartDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date when the job position vacancies were advertised on the portal. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.StartDate`.
`UniqueKey`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** A unique key for the job posting searchable field record.
`VacancyCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of vacancies in the advertised job position. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.VacancyCount`.
`WorkScheduleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of work schedule associated with the position associated with the advertised job position. For example, part time or full time. The Data Processing Engine definition Aggregate Job Posting Details for Search maps this field to `RecruitmentPosting.RecruitmentRequisition.JobPstrRecruitmentRqs.JobPosition.Position.ScheduleType`

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.

JobPostingSearchableFieldOwnerSharingRule **on page 832**
Sharing rules are available for the object.

JobPostingSearchableFieldShare on page 825
Sharing is available for the object.

JobPstnRecruitmentRqs

Represents a junction between a job position and a recruitment requisition. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the job position recruitment requisition is effective.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the job position recruitment requisition is no longer effective.

Field	Details
`JobPositionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the job position associated with the job position recruitment requisition. This field is a relationship field. **Relationship Name** JobPosition **Relationship Type** Master-detail **Refers To** JobPosition (the master object)
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the job position recruitment requisition.
`RecruitmentRequisitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The ID of the recruitment requisition associated with the job position recruitment requisition. This field is a relationship field. **Relationship Name** RecruitmentRequisition **Refers To** RecruitmentRequisition

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.

JobPstnRecruitmentRqsFeed on page 826
Feed tracking is available for the object.

JobPstnRecruitmentRqsHistory on page 835
History is available for tracked fields of the object.

Location

Represents a warehouse, service vehicle, work site, or other element of the region where your team performs field service work. You can associate activities with specific locations. Activities, such as the tasks and events related to a location, appear in the activities timeline when you view the location detail page.

Supported Calls

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

Fields

Field Name	Details
`CloseDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the location closed or went out of service.
`ConstructionEndDate`	**Type** date

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Date construction ended at the location.
`ConstructionStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date construction began at the location.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A brief description of the location.
`DrivingDirections`	**Type** string **Properties** Create, Filter, Nillable, Sort, Update **Description** Directions to the location.
`ExternalReference`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Identifier of a location.
`IsInventoryLocation`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the location stores parts. Note: This field must be selected if you want to associate the location with product items.

Field Name	Details
IsMobile	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the location moves. For example, a truck or tool box.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Latitude	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The latitude of the location.
Location	**Type** location **Properties** Nillable **Description** The geographic location.
LocationLevel	**Type** int **Properties** Filter, Group, Nillable, Sort

Field Name	Details
	Description The location's position in a location hierarchy. If the location has no parent or child locations, its level is 1. Locations that belong to a hierarchy have a level of 1 for the root location, 2 for the child locations of the root location, 3 for their children, and so forth.
`LocationType`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Picklist of location types. It has no default values, so you must populate it before creating any location records.
`LogoId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A ContentAsset representing a logo for the location. This field is available in API version 50.0 and later. This is a relationship field. **Relationship Name** Logo **Relationship Type** Lookup **Refers To** ContentAsset
`Longitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The longitude of the location.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field Name	Details
	Description The name of the location. For example, Service Van #4.
`OpenDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date the location opened or came into service.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The location's owner or driver. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentLocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location's parent location. For example, if vans are stored at a warehouse when not in service, the warehouse is the parent location. This is a relationship field. **Relationship Name** ParentLocation **Relationship Type** Lookup **Refers To** Location
`PossessionDate`	**Type** date

Field Name	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date the location was purchased.
`RemodelEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when remodel construction ended at the location.
`RemodelStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Date when remodel construction started at the location.
`RootLocationId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** (Read Only) The top-level location in the location's hierarchy. This is a relationship field. **Relationship Name** RootLocation **Relationship Type** Lookup **Refers To** Location
`TimeZone`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Picklist of available time zones.

Field Name	Details
`VisitorAddressId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lookup to an account's or client's address. This is a relationship field. **Relationship Name** VisitorAddress **Relationship Type** Lookup **Refers To** Address

Usage

Before creating any location records, add at least one value to the Location Type picklist. LocationType is a required field.

Important: "Location" in Salesforce can also refer to the geolocation compound field found on many standard objects. When referencing the Location object in your Apex code, always use `Schema.Location` instead of `Location` to prevent confusion with the standard Location compound field. If referencing both the Location object and the Location field in the same snippet, you can differentiate between the two by using `System.Location` for the field and `Schema.Location` for the object.

Associated Objects

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

LocationChangeEvent (API version 48.0)
Change events are available for the object.

LocationFeed
Feed tracking is available for the object.

LocationHistory
History is available for tracked fields of the object.

LocationShare
Sharing is available for the object.

Occupation

Represents a group of positions that engage in a specialized line of work and require a connected set of skills, knowledge, or qualifications. For example, the occupation of Registered Nurses in the Healthcare occupation group. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`AdditionalInformation`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Additional information about the occupation.
`Code`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code for the occupation.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the occupation.

Field	Details
`ExternalReferenceUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The link to an external source of information about the occupation.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the occupation.
`NatureOfWork`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The occupation's nature of work.
`OccupationGroupId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description ID of the occupation group associated with the occupation. This field is a relationship field. **Relationship Name** OccupationGroup **Refers To** OccupationGroup
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the occupation.
`TitlingPolicy`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies how the positions associated with the occupation must be titled.

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.

OccupationFeed **on page 826**
Feed tracking is available for the object.

OccupationHistory on page 835
History is available for tracked fields of the object.

OccupationOwnerSharingRule on page 832
Sharing rules are available for the object.

OccupationShare on page 825
Sharing is available for the object.

OccupationGroup

Represents a group of occupations that involve broadly similar functions, knowledge and skills, or materials and equipment. For example, Architecture and Engineering, Military, and Healthcare. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Code`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code for the occupation group.

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the occupation group.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the occupation group.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the occupation group. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.

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.

OccupationGroupFeed on page 826
Feed tracking is available for the object.

OccupationGroupHistory on page 835
History is available for tracked fields of the object.

OccupationGroupOwnerSharingRule on page 832
Sharing rules are available for the object.

OccupationGroupShare on page 825
Sharing is available for the object.

OmniAssessmentTask

Represents the information about an assessment task that is associated with an OmniScript. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The assessment record associated with the runtime instance of an assessment task record. The value is null when the record is designed through action plan template and populated when the assessment is taken through associated omni process. This is a relationship field. **Relationship Name** Assessment **Relationship Type** Lookup **Refers To** Assessment
`DefinitionReferenceId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The definition record associated with the runtime record. The value is null if the record is a definition record. This is a relationship field. **Relationship Name** DefinitionReference **Relationship Type** Lookup **Refers To** OmniAssessmentTask
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the task.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the task.

Field	Details
IsDefinition	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicated whether the record is a definition record. The default value is 'false'.
IsMandatoryTask	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the action is mandatory. The default value is 'false'.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the omni assessment task record.
OmniProcessId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Represents the omni process record associated with the assessment task when it is executed. This is a relationship field. **Relationship Name** OmniProcess **Relationship Type** Lookup **Refers To** OmniProcess
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the omni assessment task record owner. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Sequence`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence in which the task can be performed.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date and time of the task.
`Status`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** Specifies the status of the task. You must define and update the values manually.
`StatusCode`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** Specifies the current status of the task. Possible values are: • `Completed` • `InProgress`—In Progress • `IsDefined`—Is Defined • `NotStarted`—Not Started The default value is 'IsDefined'.
`TaskRelationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Represents the relation between an object associated with the action plan target record. This is a polymorphic relationship field. **Relationship Name** TaskRelation **Relationship Type** Lookup **Refers To** BusinessLicenseApplication, CarePlan, IndividualApplication, PublicComplaint, Visit
`UniqueName`	**Type** Text **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique name of the omni assessment task used in the Metadata API.

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.

OmniAssessmentTaskFeed on page 826
Feed tracking is available for the object.

OmniAssessmentTaskHistory on page 835
History is available for tracked fields of the object.

OmniAssessmentTaskShare on page 825
Sharing is available for the object.

OmniDataPack

For internal use only.

OmniDataTransform

For internal use only.

OmniDataTransformItem

For internal use only.

OmniESignature

For internal use only.

OmniProcess

For internal use only.

OmniProcessCompilation

For internal use only.

OmniProcessElement

For internal use only.

OmniProcessOmniAsmtTask

Represents a junction between an omni process and an omni assessment task. 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()`

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the omni process omni assessment task record.
`OmniAssessmentTaskId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The omni assessment task record associated with the omni process. This field is a relationship field. **Relationship Name** OmniAssessmentTask

Field	Details
	Refers To OmniAssessmentTask
`OmniProcessId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The omni process record associated with the omni assessment task when it is executed. This field is a relationship field. **Relationship Name** OmniProcess **Refers To** OmniProcess
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the omni process omni assessment task record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User

OmniProcessTransientData

For internal use only.

OmniScriptSavedSession

For internal use only.

OmniUiCard

For internal use only.

OperatingHours

Represents the hours that a facility is open.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field Name	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the operating hours. Add any details that aren't included in the name.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.

Field Name	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the operating hours. For example, *`Summer Hours`*, *`Winter Hours`*, or *`Peak Season Hours`*.
`TimeZone`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The time zone which the operating hours fall within.

Associated Objects

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

OperatingHoursChangeEvent on page 837
Change events are available for the object.

OperatingHoursFeed on page 826
Feed tracking is available for the object.

OperatingHoursShare on page 825
Sharing is available for the object.

OperatingHoursHoliday

Represents the day or hours for which a provider or practitioner facility is unavailable to offer service.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

Field	Details
DateAndTime	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** (Read-Only) The date or time for the holiday.
HolidayId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the holiday that's related to the operating hours indicated in the OperatingHoursId field. This is a relationship field. **Relationship Name** Holiday **Relationship Type** Lookup **Refers To** Holiday
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
OperatingHoursHolidayNumber	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** (Read-Only) An auto-generated number identifying the operating hours holiday.
`OperatingHoursId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the operating hours that's related to the holiday indicated in the HolidayId field. This is a relationship field. **Relationship Name** OperatingHours **Relationship Type** Lookup **Refers To** OperatingHours

Associated Objects

This object has the following associated objects. If the API version isn't specified, the associated objects are either available in the same API versions as the OperatingHoursHoliday object or in the specified API version and later.

OperatinghoursholidayFeed
Feed tracking is available for the object.

PartyCertifiedCapacity

Represents the information captured from the certificate of capacity, such as the party's capacity to work, a timeline for recovery, and return to work. This object is available in API version 60.0 and later.

Supported Calls

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

Special Access Rules

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

Fields

Field	Details
`Capacity`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage of capacity the party is able to work.
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim associated with the party certified capacity. This field is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim
`EffectiveEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the period the certificate is effective for.
`EffectiveStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the period the certificate is effective for.
`ExpectedWorkReturnDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The expected date the party returns to work.
FullCapacityFromDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date the party has the full capacity to work.
IssueDate	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date the certificate was issued.
IssuerId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The issuer of the party certified capacity. This field is a polymorphic relationship field. **Relationship Name** Issuer **Relationship Type** Lookup **Refers To** Account, Contact, HealthcareProvider
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the party certified capacity.
`NoCapacityEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the certified period in which the party has no capacity to work.
`NoCapacityStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the certified period in which the party has no capacity to work.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
PartialCapacityEndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the certified period in which the party has some capacity to work.
PartialCapacityStartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the certified period in which the party has some capacity to work.
PartyId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The party associated with the party certified capacity. This field is a polymorphic relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account, ClaimParticipant, Contact
Status	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the certificate. Possible values are: • Closed • Inprogress • New
UsageType	**Type** picklist

Field	Details
	Properties Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the application using the entity to populate data. Possible value: `Claim`

Associated Objects

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

PartyCertifiedCapacityFeed on page 826
Feed tracking is available for the object.

PartyCertifiedCapacityHistory on page 835
History is available for tracked fields of the object.

PartyCertifiedCapacityOwnerSharingRule on page 832
Sharing rules are available for the object.

PartyCertifiedCapacityShare on page 825
Sharing is available for the object.

PartyExpense

Represents the expense incurred by an individual or account. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicationFormId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the application form. This field is a relationship field.

Field	Details
	Relationship Name ApplicationForm **Relationship Type** Lookup **Refers To** ApplicationForm
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the expense.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the expense.
`ExpensesAsOfDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party expense is documented.
`IsReadOnly`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party expense is read only (`true`) or not (`false`). The default value is `false`.
`IsSelfPaid`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether the expense is paid by the party (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the expense.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

Field	Details
PartyFinancialLiabilityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party financial liability that's associated with the party expense. This field is a relationship field. **Relationship Name** PartyFinancialLiability **Relationship Type** Lookup **Refers To** PartyFinancialLiability
PartyId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The party associated with the expense. This field is a relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account
PartyProfileId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the party profile. This field is a relationship field. **Relationship Name** PartyProfile **Relationship Type** Lookup

Field	Details
	Refers To PartyProfile
`PayeeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party that receives the payment towards the expense. This field is a polymorphic relationship field. **Relationship Name** Payee **Relationship Type** Lookup **Refers To** Account, Contact
`PayerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party that's obligated to pay for the expense. This field is a polymorphic relationship field. **Relationship Name** Payer **Relationship Type** Lookup **Refers To** Account, Contact
`RecurrenceInterval`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The interval after which the expense is incurred. Possible values are: • `Bi-Weekly` • `Monthly`

Field	Details
	• One Time • Weekly • Yearly
StartDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date and time of the expense.
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the expense. Valid values are: • Active • Inactive
TotalAmount	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The total expense amount.
Type	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of expense. Valid values are: • Child Care • Child Support • Garnishments • Health and Hospitalization Insurance Premiums • Medical Prescriptions and Expenses

Field	Details
	• `Reimbursement` • `Representative Payee` • `Spousal Support`
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The usage type of the party expense. Valid value is `PublicSector` for Program and Benefit Management. Available in API version 60.0 and later.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The verification status of the party expense.

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.

PartyExpenseChangeEvent on page 837 (API Version 62.0)
Change events are available for the object.

PartyExpenseFeed on page 826
Feed tracking is available for the object.

PartyExpenseHistory on page 835
History is available for tracked fields of the object.

PartyExpenseOwnerSharingRule on page 832 (API Version 60.0)
Sharing rules are available for the object.

PartyExpenseShare on page 825 (API Version 60.0)
Sharing is available for the object.

PartyFinancialAsset

Represents the financial asset owned by an individual or account. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
`AssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The asset owned by the party. Available in API version 59.0 and later. This field is a relationship field. **Relationship Name** Asset **Relationship Type** Lookup **Refers To** Asset
`DeclarationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the asset is declared.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the asset.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the asset.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
OwnershipEndDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the ownership of the asset ends.
OwnershipPercent	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The share owned by the party in percentage.
`OwnershipStartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the ownership of the asset starts.
`PartyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Required. The party that owns the asset. This field is a polymorphic relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account, Contact
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the asset. Possible values are: • `Active` • `Inactive`
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique identifier of the party asset in an external system.

Field	Details
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of asset.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the usage type of the party financial asset. Possible value: • `PublicSector`—Program and Benefit Management Available in API version 60.0 and later.
`ValuationAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Required. The worth of the asset after valuation.
`ValuationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the asset valuation was done.

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.

PartyFinancialAssetChangeEvent on page 837 (API Version 62.0)
Change events are available for the object.

PartyFinancialAssetFeed on page 826
Feed tracking is available for the object.

PartyFinancialAssetHistory on page 835
History is available for tracked fields of the object.

PartyFinancialAssetOwnerSharingRule on page 832 (API Version 59.0)
Sharing rules are available for the object.

PartyFinancialAssetShare on page 825 (API Version 59.0)
Sharing is available for the object.

PartyIncome

Represents all income earned by an individual. The income could be from various sources such as salary, commissions, fees, rental properties, and so on.

Supported Calls

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

Fields

Field	Details
`CalendarYear`	**Type** int **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Required. Specifies the period between January and December for any given year.
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim that this party income is associated with. This field is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim

Field	Details
EmployerAddress	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The physical address of the employer.
EmployerId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person account associated with the employer record. This field is a relationship field. **Relationship Name** Employer **Relationship Type** Lookup **Refers To** Account
EmployerName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the employer.
EmployerPhone	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The phone number of the employer.
EndDate	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Required. The date when the party income ends.

Field	Details
`IncomeAmount`	**Type** currency **Properties** Create, Filter, Sort, Update **Description** Required. The total amount of income the individual makes for a given period.
`IncomeFrequency`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Required. Specifies the frequency of the party income. Possible values are: • `Monthly` • `Weekly` • `Yearly`
`IncomeLossPercent`	**Type** percent **Properties** Create, Filter, Nillable, Sort, Update **Description** The percentage loss of income due to a change in the individual's employment status.
`IncomeStatus`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Required. Specifies the status of the income. Possible values are: • `Active` • `Inactive`
`IncomeType`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description Required. Specifies the type of income such as salary, commissions, rentals, and so on. Possible values are: • `Commission` • `Fees` • `Rent` • `Salary`
`JobTitle`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The job title of the individual receiving the income.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`ModificationReason`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for a change in an individual's employment status.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description Name of the party income.
NetIncome	**Type** currency **Properties** Create, Defaulted on create, Filter, Sort, Update **Description** Required. The amount made by an individual every month after deductions.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
PartyId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The Party associated with the Party Income. This field is a polymorphic relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account, Contact
StartDate	**Type** dateTime

Field	Details
	Properties Create, Filter, Sort, Update **Description** Required. The date when the party income starts.

Associated Objects

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

PartyIncomeChangeEvent on page 837 (API version 62.0)
Change events are available for the object.

PartyIncomeFeed on page 826
Feed tracking is available for the object.

PartyIncomeHistory on page 835
History is available for tracked fields of the object.

PartyIncomeOwnerSharingRule on page 832
Sharing rules are available for the object.

PartyIncomeShare on page 825
Sharing is available for the object.

PartyProfile

Represents information about the profile of a party, such as an account. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access

User Type	Permission Set
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account that's associated with the party profile. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`BusLicIssAuthorityName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the business license issuing authority.
`BusinessEntityCtryofInc`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the country where the business entity was formed.
`BusinessEntityCtryofRgstr`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the country where the business entity is registered.

Field	Details
BusinessEntityIncDate	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The incorporation date of the business entity associated with the party profile.
BusinessEntityIncNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The incorporation number of the business entity associated with the party profile.
BusinessEntityName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The registered name of the business entity associated with the party profile.
BusinessEntityPreviousNames	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Any previous names of the business entity associated with the party profile.
BusinessEntityRgstrDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The registration date of the business entity associated with the party profile.
BusinessEntityRgstrNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The registration number of the business entity associated with the party profile.

Field	Details
BusinessEntityTradeName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The trading name of the business entity associated with the party profile.
BusinessEntityType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of the business entity associated with the party profile. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
ContactId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the contact that's associated with the party profile. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
CountryOfDomicile	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the country of domicile in the party profile.
CountryofBirth	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the country of birth in the party profile.
`CreditScore`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The credit score of the party.
`CreditScoreProvider`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the name of the agency that provides the credit score of the party.
`EmploymentIndustry`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the employment industry of the party specified in the profile. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`EmploymentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of employment held by the party. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`FirstName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The first name of the party in the profile.

Field	Details
FullName	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The full name of the party in the profile.
FundSource	**Type** multipicklist **Properties** Create, Filter, Nillable, Update Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
Gender	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the gender of the party in the profile. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
HouseholdAccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the household account that's associated with the party profile. This field is a relationship field. **Relationship Name** HouseholdAccount **Relationship Type** Lookup **Refers To** Account
Industry	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Represents the industry in which a business entity operates.
`IndustryClassificationCode`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique code associated with the industry in which a business entity operates.
`IsBusEntyListonStockExch`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the business entity is listed on a stock exchange (true) or not (false). The default value is `false`.
`IsNetWorthHigh`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the customer has a high net worth (true) or not (false). The default value is `false`.
`IsOffBoarded`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party profile was off-boarded (true) or not (false). The default value is `false`.
`LastName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last name of the party in the profile.

Field	Details
`LastProfileReviewDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the party profile was last reviewed.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`LeadId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The lead that's associated with the party profile. This field is a relationship field. **Relationship Name** Lead **Relationship Type** Lookup **Refers To** Lead
`LegalEntityIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The unique identifier of the business entity used in all financial transactions.
`MiddleName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The middle name of the party in the profile.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party profile record.
`Nationality`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The nationalities held by the party profile.
`NextProfileReviewDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date of the next party profile review.
`OffBoardingComments`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The date of the next party profile review.
`OffBoardingReason`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier for the party.
`PrimaryIdentifierType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of primary identification document defined in the profile. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`PrimaryPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary phone number of the party that's specified in the profile.
`RelatedPartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the party profile record associated with this record. This field is a relationship field. **Relationship Name** RelatedPartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`ResidentType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of party residency in the profile.

Field	Details
ReviewDecision	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the decision taken after the party profile review is complete. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
Stage	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The current stage of the party profile. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
StockExchangeName	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the name of the stock exchange where the business entity is listed. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
Suffix	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The suffix used by the party.
SurnameAtBirth	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party surname at birth specified in the profile.

Field	Details
TaxpayerIdentificationNumber	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The taxpayer identifier that's used for tax purposes.
TaxpayerIdentificationType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The type of taxpayer identification used for tax purposes. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
Type	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of the party profile associated with the applicant. Possible values are: • Business • Individual
RetirementFundAccountNumber	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The retirement fund account number of the party profile

Associated Objects

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

PartyProfileChangeEvent on page 837
Change events are available for the object.

PartyProfileFeed on page 826
Feed tracking is available for the object.

PartyProfileHistory on page 835
History is available for tracked fields of the object.

PartyProfileOwnerSharingRule on page 832
Sharing rules are available for the object.

PartyProfileShare on page 825
Sharing is available for the object.

PartyProfileAddress

Represents information about the address of the party. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Address`	**Type** address **Properties** Filter, Nillable **Description** The full address.

Field	Details
`AddressType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of party address. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`City`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The city detail for the address. For example, this field is known as MailingCity on Contact.
`Country`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The country detail for the address. For example, this field is known as MailingCountry on Contact.
`GeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the address's latitude and longitude coordinates. Possible values are: • `Address` • `Block` • `City` • `County` • `ExtendedZip` • `NearAddress` • `Neighborhood` • `State`

Field	Details
	• `Street` • `Unknown` • `Zip`
`IsPrimaryAddress`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party's address is the primary address. The default value is `false`.
`IsCurrentAddress`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the party profile address is the current address (true) or not (false). The default value is `false`.
`IsPermanentAddress`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the address of the party profile is a permanent address (true) or not (false). The default value is `false`.
`IsVerified`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the party profile address is verified (true) or not (false).
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Latitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Longitude to specify the precise geolocation of the address. For example, this field is known as MailingLatitude on Contact.
`Longitude`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Used with Latitude to specify the precise geolocation of the address. For example, this field is known as MailingLongitude on Contact.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party profile address record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner

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

Field	Details
`ValidityEndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the party profile address becomes valid.
`ValidityStartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date until when the party profile address is valid.

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.

PartyProfileAddressChangeEvent on page 837
Change events are available for the object.

PartyProfileAddressFeed on page 826
Feed tracking is available for the object.

PartyProfileAddressHistory on page 835
History is available for tracked fields of the object.

PartyProfileAddressOwnerSharingRule on page 832
Sharing rules are available for the object.

PartyProfileAddressShare on page 825
Sharing is available for the object.

PayGrade

Represents a range of positions that require sufficiently similar responsibilities and competencies, and are associated with a common pay band. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Code`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code for the pay grade.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the pay grade.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the pay grade is effective.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The date when the pay grade is no longer effective.
`ExternalReferenceUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The link to an external source of information about the pay grade.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`MaximumSalary`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The maximum salary for the pay grade.
`MinimumSalary`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The minimum salary for the pay grade.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the pay grade.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **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.

PayGradeFeed on page 826
Feed tracking is available for the object.

PayGradeHistory on page 835
History is available for tracked fields of the object.

PayGradeOwnerSharingRule on page 832
Sharing rules are available for the object.

PayGradeShare on page 825
Sharing is available for the object.

PayGradeStep

Represents a pay range within the pay band associated with a pay grade. Pay steps enable pay raises within the pay band. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description for the pay grade step.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the pay grade step is effective.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the pay grade step is no longer effective.

Field	Details
`HourlyBasicRate`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The hourly basic rate for the pay grade step.
`HourlyOvertimeRate`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The hourly overtime rate for the pay grade step.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`MaximumAnnualSalary`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The maximum annual salary for the pay grade step.
`MinimumAnnualSalary`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The minimum annual salary for the pay grade step.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the pay grade step.
PayGradeId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the pay grade associated with the pay grade step. This field is a relationship field. **Relationship Name** PayGrade **Relationship Type** Master-detail **Refers To** PayGrade (the master object)

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.

PayGradeStepFeed on page 826
Feed tracking is available for the object.

PayGradeStepHistory on page 835
History is available for tracked fields of the object.

PayGradeStepLocation

Represents a junction between a pay grade step and a location. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the pay grade step location.
`EffectiveFromDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the pay grade step location is effective.
`EffectiveToDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the pay grade step location is no longer effective.

Field	Details
`HourlyBasicRate`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The hourly basic rate for the pay grade step location.
`HourlyOvertimeRate`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The hourly overtime rate for the pay grade step location.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the location associated with the pay grade step location. This field is a relationship field. **Relationship Name** Location **Refers To** Location

Field	Details
MaximumAnnualSalary	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The maximum annual salary for the pay grade step location.
MinimumAnnualSalary	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The minimum annual salary for the pay grade step location.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the pay grade step location.
PayGradeStepId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the pay grade associated with the pay grade step location. This field is a relationship field. **Relationship Name** PayGradeStep **Relationship Type** Master-detail **Refers To** PayGradeStep (the master object)

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.

PayGradeStepLocationFeed **on page 826**

Feed tracking is available for the object.

PayGradeStepLocationHistory on page 835
History is available for tracked fields of the object.

PaymentRequest

Represents a financial compensation request for goods or services provided by a third party. 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

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

Fields

Field	Details
`ClaimId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim associated with the payment request. This field is a relationship field. **Relationship Name** Claim **Relationship Type** Lookup **Refers To** Claim
`DueDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The due date of the payment request.

Field	Details
EndDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date of services represented in the payment request.
FacilityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The facility associated with the payment request. This field is a polymorphic relationship field. **Relationship Name** Facility **Relationship Type** Lookup **Refers To** Account, HealthcareFacility, Location
InsurancePolicyId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The insurance policy associated with the payment request. This field is a relationship field. **Relationship Name** InsurancePolicy **Relationship Type** Lookup **Refers To** InsurancePolicy
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.

Field	Details
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the payment request.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ReceivedDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the recipient received the payment request.
`ReceivedMethod`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The method in which the payment request was received. Possible values are: • `Electronic Submission` • `Paper Mail`
`ReferenceNumber`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** External unique identifier from the submitting party, such as an invoice number.
`RemittanceAccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that receives the remittance payment for the services. This field is a polymorphic relationship field. **Relationship Name** RemittanceAccount **Relationship Type** Lookup **Refers To** Account
`ServiceProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service provider associated with the payment request. This field is a polymorphic relationship field. **Relationship Name** ServiceProvider **Relationship Type** Lookup **Refers To** Account, Contact, HealthcareProvider

Field	Details
`ServiceRecipientId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that receives the services in the payment request. This field is a polymorphic relationship field. **Relationship Name** ServiceRecipient **Relationship Type** Lookup **Refers To** Account, Contact
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date of services represented in the payment request.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the payment request. Possible values are: • `Paid` • `Received`
`SubmissionType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of payment request submission, such as an invoice from a service provider. Possible values are: • `Invoice` • `Online Submission`

Field	Details
SubmittedDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date on which the service provider submitted the payment request.
SubmittingAccountId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The billing account that submits the payment to the service recipient. This field is a relationship field. **Relationship Name** SubmittingAccount **Relationship Type** Lookup **Refers To** Account
TotalAdjustmentAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount that is adjusted, such as the collection of a copay onsite. This field is a calculated field.
TotalRequestedAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** Total amount requested for reimbursement. This field is a calculated field.
TotalServiceAmount	**Type** currency **Properties** Filter, Nillable, Sort

Field	Details
	Description Total amount of the services, such as the total services billed. 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.

PaymentRequestFeed on page 826
Feed tracking is available for the object.

PaymentRequestHistory on page 835
History is available for tracked fields of the object.

PaymentRequestOwnerSharingRule on page 832
Sharing rules are available for the object.

PaymentRequestShare on page 825
Sharing is available for the object.

PaymentRequestLine

Represents the line item details of the financial compensation request. 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

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

Fields

Field	Details
`AdjustmentAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Adjustment amount for reasons such as copay, deductible, and coinsurance.

Field	Details
`AdjustmentReason`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** The reason for adjustment. Possible values are: • `Coinsurance` • `Copay` • `Deductible`
`BenefitName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of benefit associated with the payment request line, such as Physical Therapy or Ambulance Transportation.
`ClaimItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The claim item associated with the payment request line. This field is a relationship field. **Relationship Name** ClaimItem **Relationship Type** Lookup **Refers To** ClaimItem
`DiagnosticCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The diagnostic code associated with the payment request line. This field is a polymorphic relationship field.

Field	Details
	Relationship Name DiagnosticCode **Relationship Type** Lookup **Refers To** CodeSet, CodeSetBundle
EndDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date of services represented in the payment request line.
FacilityId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The facility associated with the payment request line. This field is a polymorphic relationship field. **Relationship Name** Facility **Relationship Type** Lookup **Refers To** Account, HealthcareFacility, Location
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the payment request line.
`PaymentRequestId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. The payment request associated with the payment request line. This field is a relationship field. **Relationship Name** PaymentRequest **Relationship Type** Lookup **Refers To** PaymentRequest
`Quantity`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Number of units the payment request line represents, such as number of days in hospital.
`QuantityUnitOfMeasure`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Unit of measure for the quantity field. Possible values are: • `Days` • `Nights`

Field	Details
	• Visits
RequestedAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Amount that the requestor is seeking for payment, which is the service amount minus the adjustment amount.
ServiceAmount	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** Total service amount for the payment request line before adjustments.
ServiceCodeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service code associated with the payment request line. This field is a polymorphic relationship field. **Relationship Name** ServiceCode **Relationship Type** Lookup **Refers To** CodeSet, CodeSetBundle
ServiceProviderId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service provider associated with the payment request line. This field is a polymorphic relationship field. **Relationship Name** ServiceProvider

Field	Details
	Relationship Type Lookup **Refers To** Account, Contact, HealthcareProvider
`ServiceType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of requested service. Possible values are: • `Device` • `Medication` • `Procedure` • `Repairs`
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date of services represented in the payment request line.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the payment request line. Possible values are: • `Paid` • `Partially Paid` • `Received`
`UnitPrice`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Unit Price for the quantity and quantity unit of measure.

Associated Objects

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

PaymentRequestLineFeed on page 826
Feed tracking is available for the object.

PaymentRequestLineHistory on page 835
History is available for tracked fields of the object.

PersonDisability

Represents information about a person's disability. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
`EndDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the disability.
`IndividualId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The individual associated with the disability. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Individual **Relationship Type** Lookup **Refers To** Account, Contact, Individual
`IsAccommodationRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the individual requires accommodation. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name for this record.
`Rank`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the level of disability.
`StartDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date and time of the disability.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the status of the disability. Possible values are: • `Permanent` • `Temporary` The default value is `Temporary`.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of disability. Possible values are: • `Blindness` • `Cognitive` • `Hearing impairment`
`VerificationDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the disability was verified.

Field	Details
`VerifiedBy`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the verifier of the disability in the individual. Possible values are: • `HealthcareProvider` • `Other` • `Physician` • `Psychologist` • `SelfReported` • `SocialWorker` • `Teacher` • `Therapist` The default value is `Physician`.
`VerifiedByOther`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the verifier of the disability if its other than what is listed in `VerifiedBy`.

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.

PersonDisabilityFeed on page 826
Feed tracking is available for the object.

PersonDisabilityHistory on page 835
History is available for tracked fields of the object.

PersonDisabilityShare on page 825
Sharing is available for the object.

PersonEducation

Represents information about the professional education for a person.

Supported Calls

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

Fields

Field	Details
`CompletionDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Education's completion date.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who earned the degree and is listed as a contact.
`EducationLevel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Level of education achieved. Example values: • Undergraduate degree • Medical school • Internship • Residency • Fellowship
`GraduationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Graduation date from institution.

Field	Details
HealthcareProviderId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person in a provider role whose education details are represented by this record. This field is a relationship field. **Relationship Name** HealthcareProvider **Relationship Type** Lookup **Refers To** HealthcareProvider
Identifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID issued to the recipient by the educational institution.
IdentifierIssuer	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Educational institution's name.
IndividualId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the person who earned the degree and is listed as an individual.
IsActive	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the degree earned.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
StartDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Education's start date.
Status	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Current status of education. Valid values:

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

Associated Objects

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

PersonEducationFeed
Feed tracking is available for the object.

PersonEducationHistory
History is available for tracked fields of the object.

PersonEducationOwnerSharingRule
Sharing rules are available for the object.

PersonEducationShare
Sharing is available for the object.

PersonEmployment

Represents information about a person's employment.

Supported Calls

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

Special Access Rules

To access this object, you must have the Public Sector Access permission set or the Public Sector Access permission set license.

Fields

Field	Details
`AnnualIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The annual income of the person.
`EmployerAddress`	**Type** address **Properties** Filter, Nillable **Description** The complete address of the employer.
`EmployerPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Employer's phone number.
`EmploymentStatus`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the employment status with the employer. Possible values are: • `Employed` • `Retired` • `Self-Employed` • `Unemployed`
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last date of employment at this job.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name for this record.
`Occupation`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the person's occupation. Possible values are: • `Actor or Entertainer` • `Architect or Urban Planner` • `Artist` • `Business (Clerical)` • `Business Executive (Management, Administrator)` • `Business Owner or Proprietor` • `Business Salesperson or Buyer` • `Clergy (Minister, Priest)` • `Clergy (Other Religious)` • `Clinical Psychologist` • `College Administrator or Staff` • `College Teacher` • `Computer Programmer or Analyst` • `Conservationist or Forester` • `Dentist (Including Orthodontist)` • `Dietitian or Nutritionist` • `Engineer` • `Farmer or Rancher` • `Foreign Service Worker (Including Diplomat)` • `Homemaker (Full-Time)` • `Interior Decorator (Including Designer)` • `Lab Technician or Hygienist` • `Laborer` • `Law Enforcement Officer` • `Lawyer (Attorney) or Judge` • `Military Service (Career)` • `Musician (Performer, Composer)` • `Nurse` • `Optometrist` • `Other` • `Pharmacist` • `Physician` • `Policymaker or Government`

Field	Details
	• School Counselor • School Principal or Superintendent • Scientific Researcher • Skilled Trades • Social, Welfare, or Recreation Worker • Teacher or Administrator (Elementary) • Teacher or Administrator (Secondary) • Therapist (Physical, Occupational, Speech) • Veterinarian • Writer or Journalist
Position	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The last position of the person at this job.
RelatedPersonId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The person associated with the employment. This field is a polymorphic relationship field. **Relationship Name** RelatedPerson **Relationship Type** Lookup **Refers To** Account, Contact
StartDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of employment at this job.

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.

PersonEmploymentChangeEvent on page 837 (API version 61.0)
Change events are available for the object.

PersonEmploymentFeed on page 826
Feed tracking is available for the object.

PersonEmploymentHistory on page 835
History is available for tracked fields of the object.

PersonEmploymentShare on page 825
Sharing is available for the object.

PersonExamination

Represents the examinations taken by a person. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the contact related to this record.
`EffectiveFrom`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date from which the examination is effective from.
`EffectiveTo`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** Date till which the examination is effective.
`ExaminationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date the examination was taken.
`ExaminationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the examination.
`InstituitionName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the institution offering the examination.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the examination taken by the person.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this record.
`Result`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Result of the examination. Possible values are: • `Fail` • `Pass`
`Score`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Score secured in the examination.
`VerificationDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date and time the examination details were verified.
`VerificationStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Status of the examination details verification. Possible values are: • `Not Verified` • `Verified`

Associated Objects

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

PersonExaminationFeed on page 826
Feed is available for the object.

PersonExaminationHistory on page 835
History is available for the object.

PersonExaminationOwnerSharingRule
Sharing rules are available for the object.

PersonExaminationShare
Share is available for the object.

PersonLifeEvent

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

Supported Calls

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

Fields

Field	Details
`EventDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Required. The date on which the life event occurred.
`EventDescription`	**Type** textarea

Field	Details
	Properties Create, Nillable, Update **Description** The description of the life event.
`EventLocation`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the life event occurred. This is a compound field of type Address and combines these fields: EventLocationCity, EventLocationCountry, EventLocationGeocodeAccuracy, EventLocationLatitude, EventLocationLongitude, EventLocationPostalCode, EventLocationState, and EventLocationStreet. For more information, see Address Compound Fields.
`EventType`	**Type** picklist **Properties** Create, Filter, Group, Sort **Description** Required. The type of the life event. For example, birth, graduation, job, marriage, relocation, car, home, baby, retirement.
`ExpirationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The the date when a life event expired.
`ExpirationDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** Describes why the event expired.
`IsExpired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description Indicates whether a life event has expired. The default value is False.
IsTentative	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates that the exact date of the event is not known. The default value is False.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Required. The name of the life event.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.
PrimaryPersonId	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** Required. ID of the person to whom the life event is related. This field cannot be updated using API.
`RelatedPersonId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person related to the primary person in a life event involving two people, such as marriage.
`SourceSystem`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source system this record was obtained from.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of this record in the source system.

Associated Objects

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

PersonLifeEventFeed
Feed tracking is available for the object.

PersonLifeEventHistory
History is available for tracked fields of the object.

PersonLifeEventOwnerSharingRule
Sharing rules are available for the object.

PersonLifeEventShare
Sharing is available for the object.

Polygon

Represents a polygon with the polygon mapping data stored as a blob. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
`Data`	**Type** textarea **Properties** Create, Update **Description** **The polygon data in a supported format like kml or geojson.**
`DataType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the supported polygon formats for Data File. Possible values are: • `GEOJSON` • `KML` • `OTHER`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the polygon.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this record.

Associated Objects

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

PolygonFeed on page 826
Feed is available for the object.

PolygonHistory on page 835
History is available for the object.

PolygonOwnerSharingRule on page 832
Sharing rules are available for the object.

PolygonShare on page 825
Sharing is available for the object.

Position

Represents a functional role that is characterized by specific duties and responsibilities, and required skills and qualifications. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Code`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code for the position.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the position.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the position.
`OccupationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the occupation associated with the position. This field is a relationship field. **Relationship Name** Occupation **Refers To** Occupation
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`ScheduleType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of work schedule associated with the position. For example, part-time or full-time.

Field	Details
	Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`Sensitivity`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The sensitivity of the position. Indicates the security clearance or background verification required for an individual in the position. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the position. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of the position. For example, permanent or temporary. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.

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.

PositionFeed on page 826
Feed tracking is available for the object.

PositionHistory on page 835
History is available for tracked fields of the object.

PositionOwnerSharingRule on page 832
Sharing rules are available for the object.

PositionShare on page 825
Sharing is available for the object.

PositionPayGrade

Represents a junction between a position and a pay grade. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the position pay grade.
`PayGradeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the pay grade associated with the position pay grade. This field is a relationship field. **Relationship Name** PayGrade **Refers To** PayGrade
`PositionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the position associated with the position pay grade. This field is a relationship field. **Relationship Name** Position **Relationship Type** Master-detail **Refers To** Position (the master object)

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.

PositionPayGradeFeed on page 826
Feed tracking is available for the object.

PositionPayGradeHistory on page 835
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()`, `undelete()`, `update()`, `upsert()`, `search()`

Fields

Field	Details
`ApplicantInformation`	**Type** textarea **Properties** Create, Nillable, Update **Description** The information about the applicant provided in the application form. Available in API version 62.0 and later. Talent Recruitment Management must be enabled.
`ApplicationName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the preliminary application.
`ApplicationType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Type of application. Possible values are: • `BusinessLicenseApplication`—Business License Application • `BusinessPrescreening`—License Requirement Assessment

Field	Details
	• `IndividualApplication`—Individual Application
`BusinessAccountNameId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the business account related to the application.
`IsSubmitted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the application was submitted.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the preliminary application.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description ID of the owner who owns the record.
`SavedApplicationUrl`	**Type** url **Properties** Create, Filter, Group, Sort, Update **Description** Relative path of the saved application.

Associated Objects

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

PreliminaryApplicationRefFeed on page 826
Feed is available for the object.

PreliminaryApplicationRefHistory on page 835
History is available for the object.

PreliminaryApplicationRefOwnerSharingRule
Sharing rules are available for the object.

PreliminaryApplicationRefShare
Share is available for the object.

Program

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

Supported Calls

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

Fields

Field	Details
`ActiveEnrolleeCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The count of program enrollees in active status.
`AdditionalContext`	**Type** textarea **Properties** Create, Nillable, Update **Description** The additional context about the program.
`CurrentMonthDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the current month.
`CurrentYearDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the current year.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the program ends.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** dateTime

Field	Details
	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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the program.
`OwnerId`	**Type** 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. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentProgramId`	**Type** 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

Field	Details
`PreviousMonthDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the previous month.
`PreviousYearDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The count of benefit that's disbursed in the previous year.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the program begins.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The status of the program. Possible values are: • `Active` • `Cancelled` • `Completed` • `Planned`
`Summary`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The summary of the program.

Field	Details
`TotalEnrolleeCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The total enrollee count in the program.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** 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 on page 826
Feed tracking is available for the object.

ProgramHistory on page 835
History is available for tracked fields of the object.

ProgramOwnerSharingRule on page 832
Sharing rules are available for the object.

ProgramShare on page 825
Sharing is available for the object.

ProgramCohortMember

Represents program enrollees that are part of a given 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.

Fields

Field	Details
`IsRemovedFromCohort`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the program cohort member was removed from the cohort. The default value is `false`.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the program cohort member.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	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
`ProgramCohortId`	**Type** reference **Properties** Create, Filter, Group, Sort **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`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** 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

Field	Details
`ProgramEnrollmentId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The program enrollment associated with the program cohort member. This field is a relationship field. **Relationship Name** ProgramEnrollment **Relationship Type** Lookup **Refers To** ProgramEnrollment
`ProgramEnrollmentStatus`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** 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.

ProgramCohortMemberOwnerSharingRule
Sharing rules are available for the object.

ProgramCohortMemberShare
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.

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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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

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

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the enrollment in the program.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the enrollment for the participant in the program is active (`true`) or not (`false`). The default value is `false`.
`IsAnonymous`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the participant enrolled to the program anonymously (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the program enrollment record.
`OwnerId`	**Type** 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 **Refers To** Group, User
`PreviousMonthDisbCount`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** 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`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** 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`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description 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`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the enrollment in the program.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** 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.

ProgramEnrollmentOwnerSharingRule
Sharing rules are available for the object.

ProgramEnrollmentShare
Sharing is available for the object.

PublicApplicationParticipant

Represents a junction between an individual application or business license application, and an account or a contact. This object stores the details of the participants associated with an application. This participant could be the applicant, co-applicant, a household, or even a business account that is added to an application. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
`ApplicationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The individual application or business application associated with the public application participant record. This field is a polymorphic relationship field. **Relationship Name** Application **Relationship Type** Lookup **Refers To** BusinessLicenseApplication, IndividualApplication
`BenefitEligibilityStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the participant's benefit eligibility. Possible values are: • `Eligible`

Field	Details
	• `Ineligible` • `OnHold`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the public application participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant associated with the public application participant record. This field is a polymorphic relationship field. **Relationship Name** Participant **Relationship Type** Lookup **Refers To** Account, Contact
`RelationshipType`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The participant's relationship to the primary applicant of the individual or business application Possible values are: • `Aunt` • `Brother` • `Cousin` • `Daughter` • `Father` • `Foster Child` • `Foster Parent` • `Grandfather` • `Grandmother` • `Mother` • `Nephew` • `Niece` • `Not Related` • `Self` • `Sister` • `Son` • `Spouse` • `Stepdaughter` • `Stepfather` • `Stepmother` • `Stepson` • `Uncle`
`Role`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the role of the public application participant. Possible values are: • `Applicant` • `Co-applicant`

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the public application participant. Possible values are: • `Active` • `Inactive`

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.

PublicApplicationParticipantFeed on page 826
Feed tracking is available for the object.

PublicApplicationParticipantHistory on page 835
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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the account associated with this complaint. **Relationship Name** Account

Field	Details
	Relationship Type Lookup **Refers To** Account
`BusinessAddress`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Address of the business.
`BusinessName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the business
`CauseSubtype`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subtype of complaint cause. This field is available in API version 58.0 and later. Possible value is: • `Misleading advertisement or documentation`
`CauseType`	**Type** picklist **Properties** 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`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description Additional details about the complaint. This field is available in API version 51.0 and later.
`CompensationAmount`	**Type** currency **Properties** 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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This field is deprecated as of API version 49.0.
`ComplaintCaseStatus`	**Type** 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` • `Working` • `Escalated` • `Closed` The default is `New`.
`ComplaintSubType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Subtype of the complaint. Possible values are: • `Burns` • `Educational Neglect`

Field	Details
	• Emotional Neglect • Exploitation • Fire Safety • Isolation • Medical Neglect • Physical Neglect • Rough Treatment • Sexual Activities • Sexual Exploitation • Sexual Exposure • Suffocation • Terror
ComplaintType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of complaint. Possible values are: • Mental Abuse • Neglect • Physical Abuse • Safety • Sexual Abuse
Description	**Type** textarea **Properties** Create, Nillable, Update **Description** Description of the complaint. Description is filterable and sortable in API version 61.0 and earlier.
Email	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Email of the complainant.

Field	Details
`EscalationCause`	**Type** 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` • `Alleged Discrimination` • `Alleged MLA Violation` • `Alleged SCRA Violation` • `Alleged UDAAP Violation` • `Consumer Protection Agency Involvement` • `Lawsuit Filed` • `Media Involvement` • `None` • `Received by Executive Leadership` The default is `None`.
`FirstName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** First name of the complainant.
`IncidentDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** Date of the incident.
`IsComplainantAuthorized`	**Type** 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.

Field	Details
	The default value is `false`.
`IsReporterConfidential`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Reporter's request for confidentiality. The default value is `false`.
`LastName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Last name of the complainant.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date that a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date that a user viewed this record.
`MobileNumber`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Mobile number of the complainant.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description Name of the complaint.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the complaint owner. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Priority of the complaint. Possible values are: • `Critical` • `High` • `Low` • `Medium`
`ProductType`	**Type** 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`

Field	Details
	• `Mobile / electronic banking` • `Money transfers, virtual currency, and money services` • `Mortgage / Home Finance` • `Other` • `Personal Loan / other loans` • `Vehicle loan or lease`
`ReceivedDate`	**Type** 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`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Address of the reporter for further communication.
`ReporterCategory`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **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

Field	Details
	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` • `Mobile App` • `Regulatory Agency` • `Social Media` • `Web Chat`
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the complaint. Possible values are: • `In Review` • `Resolved` • `Submitted`

Field	Details
`Subject`	**Type** 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 on page 826
Feed is available for the object.

PublicComplaintHistory on page 835
History is available for the object.

PublicComplaintOwnerSharingRule
Sharing rules are available for the object.

PublicComplaintShare
Sharing is available for the object.

RecruitmentContentSection

Represents the content that you want to include in a section of a recruitment posting. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access

User Type	Permission Set
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Content`	**Type** textarea **Properties** Create, Nillable, Update **Description** The content of the recruitment content section.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the recruitment content section.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date of the recruitment content section.
`Language`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the language of the content. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the recruitment content section.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date of the recruitment content section.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description The status of the recruitment content section. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of content. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.

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.

RecruitmentContentSectionFeed **on page 826**
Feed tracking is available for the object.

RecruitmentContentSectionHistory **on page 835**
History is available for tracked fields of the object.

RecruitmentContentSectionOwnerSharingRule **on page 832**
Sharing rules are available for the object.

RecruitmentContentSectionShare **on page 825**
Sharing is available for the object.

RecruitmentPosting

Represents an advertisement of a vacancy that you're recruiting for and specifies when and where the advertisement is posted. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`CandidateSourceKey`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the unique key for the internal or external recruitment portal where the vacancy is advertised. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the recruitment posting.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the vacancy is removed from the recruitment portal.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the recruitment posting.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`PostingTitle`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The title of the vacancy in the recruitment posting.
`PostingType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Specifies the type of recruitment posting. Possible values are: • `External` • `Internal`
`RecruitmentRequisitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the recruitment requisition associated with the recruitment posting. This field is a relationship field. **Relationship Name** RecruitmentRequisition **Refers To** RecruitmentRequisition
`RequisitionIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The name of the recruitment requisition associated with the recruitment posting.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date when the vacancy is advertised on the recruitment portal.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the recruitment posting. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.

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.

RecruitmentPostingFeed on page 826
Feed tracking is available for the object.

RecruitmentPostingHistory on page 835
History is available for tracked fields of the object.

RecruitmentPostingOwnerSharingRule on page 832
Sharing rules are available for the object.

RecruitmentPostingShare on page 825
Sharing is available for the object.

RecruitmentPostingCntntSect

Represents a junction between a recruitment posting and a recruitment content section. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the recruitment posting content section.
`RecruitmentContentSectionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the recruitment content section associated with the recruitment posting content section. This field is a relationship field. **Relationship Name** RecruitmentContentSection **Refers To** RecruitmentContentSection
`RecruitmentPostingId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description The ID of the recruitment posting associated with the recruitment posting content section. This field is a relationship field. **Relationship Name** RecruitmentPosting **Relationship Type** Master-detail **Refers To** RecruitmentPosting (the master object)

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.

RecruitmentPostingCntntSectFeed on page 826
Feed tracking is available for the object.

RecruitmentPostingCntntSectHistory on page 835
History is available for tracked fields of the object.

RecruitmentRequisition

Represents a formal request to recruit for a position or a provider vacancy. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
ActionPlanTemplateId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The action plan template associated with the recruitment requisition. This field is a relationship field. **Relationship Name** ActionPlanTemplate **Refers To** ActionPlanTemplate
ApprovalDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the recruitment requisition was approved. Available in API version 63.0 and later.
ApprovalStatus	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the approval status of the recruitment requisition. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization’s requirement.
DefaultPostingLanguage	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the default language for vacancy information on a recruitment portal when it can't be shown in the user’s selected language.
ExpectedHireDate	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The expected start date for an employee or a provider recruited for the vacancy.
`ExternalVacancyTitle`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The title of the vacancy on external recruitment portals.
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the recruitment requisition record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`RequisitionType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of the recruitment requisition. Possible values are: • `PositionRequisition` The default value is `PositionRequisition`.
`State`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the state of the recruitment requisition. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirement.
`VacancyCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of vacancies in the advertised job position.
`VacancyDescription`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the vacancy for which you want to recruit.
`VacancyTitle`	**Type** string

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The title of the vacancy in the recruitment requisition.
`VacancyType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the type of vacancy in the recruitment requisition.

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.

RecruitmentRequisitionFeed on page 826
Feed tracking is available for the object.

RecruitmentRequisitionHistory on page 835
History is available for tracked fields of the object.

RecruitmentRequisitionOwnerSharingRule on page 832
Sharing rules are available for the object.

RecruitmentRequisitionShare on page 825
Sharing is available for the object.

RecruitmentRequisitionLoc

Represents a junction between recruitment requisition and location This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`LocationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The location associated with the recruitment requisition location. This field is a relationship field. **Relationship Name** Location **Refers To** Location
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the recruitment requisition location.
`RecruitmentRequisitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The recruitment requisition associated with the recruitment requisition location. This field is a relationship field. **Relationship Name** RecruitmentRequisition **Relationship Type** Master-detail **Refers To** RecruitmentRequisition (the master object)

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.

RecruitmentRequisitionLocFeed **on page 826**
Feed tracking is available for the object.

RecruitmentRequisitionLocHistory **on page 835**
History is available for tracked fields of the object.

RecruitmentRequisitionPtcp

Represents information about a user or group of participants who have access to a recruitment requisition. This object is available in API version 62.0 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 if Talent Recruitment Management is enabled in your org and Compliant Data Sharing is enabled for the RecruitmentRequisition object. To access the object, you need these permissions.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access AND Configure Compliant Data Sharing OR Use Compliant Data Sharing permission from the Compliant DataSharing permission set license
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`Comments`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The comments about why the participant has access to the recruitment requisition.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the participant's association with the recruitment requisition is active (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the recruitment requisition participant record.
`ParticipantId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The participant associated with the recruitment requisition participant record. This field is a polymorphic relationship field. **Relationship Name** Participant **Refers To** Group, User
`ParticipantRoleId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The participant role associated with the recruitment requisition participant record. This field is a relationship field. **Relationship Name** ParticipantRole **Refers To** ParticipantRole

Field	Details
RecruitmentRequisitionId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The recruitment requisition associated with the recruitment requisition participant record. This field is a relationship field. **Relationship Name** RecruitmentRequisition **Relationship Type** Master-detail **Refers To** RecruitmentRequisition (the master object)

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.

RecruitmentRequisitionPtcpFeed **on page 826**
Feed tracking is available for the object.

RecruitmentRequisitionPtcpHistory **on page 835**
History is available for tracked fields of 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	**Type** int

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The number of times the schedule was completed.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the schedule ends.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the recurrence schedule.
`NextScheduleDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the schedule is executed next.
`OwnerId`	**Type** 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 **Refers To** Group, User

Field	Details
`ProcessName`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The name of the scheduling process that executes the request. Possible values are: • `Industries_ActionPlan` • `Industries_ProgramManagement`
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The days in a week when the schedule is executed. This field contains a bit mask. • Monday = 64 • Tuesday = 32 • Wednesday = 16 • Thursday = 8 • Friday = 4 • Saturday = 2 • Sunday = 1 Multiple days are represented as the sum of their numerical values. For example, Tuesday and Thursday = 32 + 8 = 40.

Field	Details
`ScheduleFrequency`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the frequency at which the schedule is executed. Possible values are: • `Biweekly` • `Halyearly`—Half Yearly • `Monthly` • `Quarterly` • `Weekly` • `Yearly`
`StartDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date when the schedule begins.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the schedule. Possible values are: • `Active` • `Inactive`
`TotalRecurrencesCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of times the schedule is executed.

ReceivedDocument

Contains a request for an operation to be performed on a document, such as rotating, splitting, or text extraction.

Supported Calls

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

Fields

Field	Details
`Direction`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies whether the org is receiving or sending the document. Possible values are: • `INCOMING`—Incoming • `OUTGOING`—Outgoing
`DocumentNumber`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** Unique document identification number.
`HasAutoOcrDisabled`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort **Description** Determines whether text is extracted from the document automatically. Default is False.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether the document is being processed.

Field	Details
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the received document.
`OcrStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Current state of the text extraction process. Possible values are: Draft, Approved, In Approval, In Review, Obsolete, Superseded, Archived. Default is Draft.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The user who owns the `ReceivedDocument` record.
`Priority`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Determines the order in which the document is processed when it is part of a queue. Possible values are: • `ONE`—1 • `THREE`—3 • `TWO`—2
`Source`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Origin of the incoming document. Can be used to specify processing priority.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Current stage of processing. Possible values are: • `APPROVED` • `ARCHIVED` • `COMPLETED` • `DRAFT` • `IN_REVIEW` • `NEEDS_REVIEW` • `OBSOLETE` • `PROCESSING` • `SUPERSEDED`
`StatusReason`	**Type** textarea **Properties** Create, Nillable, Update **Description** Reason for the status when processing and transforming the document.

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.

ReceivedDocumentChangeEvent (API version 59.0)
Change events are available for the object.

ReceivedDocumentType

Represents a junction object between Received Document and Document Type. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
`DocumentTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the document type for the document checklist item. This field is a relationship field. **Relationship Name** DocumentType **Relationship Type** Lookup **Refers To** DocumentType
`LastReferencedDate`	**Type** 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.

Field	Details
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the received document type.
`PageNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Page number of the received document.
`ReceivedDocumentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the received document for the received document type. This field is a relationship field. **Relationship Name** ReceivedDocument **Relationship Type** Lookup **Refers To** ReceivedDocument

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.

ReceivedDocumentTypeChangeEvent (API version 60.0)
Change events are 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`	**Type** 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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The case associated with the referral. This field is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case

Field	Details
`Category`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category of referral.
`ClientEmail`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the referred client.
`ClientId`	**Type** 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`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** The languages that the referred client speaks. Possible values are: • `Arabic` • `Chinese` • `Dutch` • `English` • `French`

Field	Details
	• `German` • `Hindi` • `Portuguese` • `Russian` • `Spanish`
`ClientName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the referred client.
`ClientPhone`	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The phone number of the referred client.
`Comments`	**Type** textarea **Properties** Create, Nillable, Update **Description** Additional details about the referral.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description of the referral.
`IsSelfReferred`	**Type** 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`.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (<parmname>LastReferencedDate</parmname>) but not viewed it.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the referral.
OutboundSourceId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The source of an outbound referral. This field is a polymorphic relationship field. **Relationship Name** OutboundSource **Relationship Type** Lookup **Refers To** Benefit Assignment, Case, Referral
OwnerId	**Type** reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this object. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Indicates the priority of the referral. Possible values are: • `Critical` • `High` • `Low` • `Medium`
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program that's associated with the referral. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program
`ProviderEmail`	**Type** email

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the person or the organization that the client is being referred to.
`ProviderFacilityId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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 **Refers To** CareProviderFacilitySpecialty, HealthcarePractitionerFacility
`ProviderId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the person or the organization that the client is being referred to.

Field	Details
ProviderOrg	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The organization that the client is being referred to.
ProviderPhone	**Type** phone **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The phone number of the person or the organization that the client is being referred to.
RecordTypeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** This field is a relationship field. **Relationship Name** RecordType **Relationship Type** Lookup **Refers To** RecordType
ReferralDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date on which the referral is received.
ReferralType	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies whether the referral is inbound or outbound. Possible values are:

Field	Details
	• `INBOUND`—Inbound • `OUTBOUND`—Outbound
`ReferrerEmail`	**Type** email **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The email address of the person or the organization that referred the client.
`ReferrerId`	**Type** 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`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the person or the organization that referred the client.
`ReferrerOrg`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The organization that referred the client.
`ReferrerPhone`	**Type** phone

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The phone number of the person or the organization that referred the client.
`Result`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The outcome of the referral.
`ResultCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the category of the referral result. Possible values are: • `Approved` • `Client Declined Services` • `Pending` • `Referred Elsewhere` • `Rejected`
`Source`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The source of the referral. Possible values are: • `Application` • `Email` • `Message` • `Other` • `Phone` • `Social Media` • `Walk-In`

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the referral. Possible values are: • `Approved` • `Enrolled` • `In Review` • `New` • `Rejected`
`Title`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The title of the referral.
`UsageType`	**Type** 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 on page 826
Feed tracking is available for the object.

ReferralHistory on page 835
History is available for tracked fields of the object.

ReferralOwnerSharingRule on page 832
Sharing rules are available for the object.

ReferralShare on page 825
Sharing is available for the object.

RegulatoryAuthority

Represents an organization or government agency that provides authorization. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text describing the regulatory authority.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** 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`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The unique name of the regulatory authority.

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

Associated Objects

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

RegulatoryAuthorityOwnerSharingRule on page 832
Sharing rules are available for the object.

RegulatoryAuthorityShare on page 825
Share is available for the object.

RegulatoryAuthorityFeed on page 826
Feed is available for the object.

RegulatoryAuthorityHistory on page 835
History is available for the object.

RegulatoryAuthorizationType

Represents the authorization issued by the regulatory body.

Supported Calls

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

Fields

Field	Details
Description	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text describing the license or permit that can be issued.

Field	Details
`DurationType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Duration of the service type. Possible values are: • `Day` • `Hour` • `Month`
`IssuingDepartmentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the regulatory authority that can issue this license or permit.
`Jurisdiction`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text describing the geographical area or legal jurisdiction for which this license or permit is authorized.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** 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.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of this license or permit type.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`ProcessingDuration`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Text describing the standard amount of time it takes to process an application for this permit or license.
`RegulatoryAuthCategory (Service Category)`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** The category of this regulatory authorization. Possible values are: • `Emergency Service` • `License` • `Permit` • `Service Request`
`RegulatoryAuthCode (Service Code)`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The service code for this regulatory authorization.

Associated Objects

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

RegulatoryAuthorizationTypeFeed on page 826
Feed is available for the object. This object is available in API version 51.0 and later.

RegulatoryAuthorizationTypeHistory on page 835
History is available for the object. This object is available in API version 51.0 and later.

RegulatoryAuthorizationTypeOwnerSharingRule on page 832
Sharing rules are available for the object.

RegulatoryAuthorizationTypeShare on page 825
Share is available for the object.

RegulatoryCode

Represents the regulation code enforced by the regulatory body. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the regulatory code.
`EffectiveFrom`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Date from which the code is effective.
`EffectiveTo`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description Date till which the code is effective.
`ExternalUrl`	**Type** url **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The URL of an external reference for the regulatory code. Available in API version 61.0 and later.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the code is active.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the code.
`ParentCodeId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** ID of the parent code.
`RegulatoryAuthorityId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the authority that governs the code.
`Subject`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Subject of the code.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Type of the code. Possible values are: • `Chapter` • `Section` • `Title`

Associated Objects

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

RegulatoryCodeChangeEvent on page 837 (API Version 58.0)
Change events are available for the object.

RegulatoryCodeFeed on page 826
Feed is available for the object.

RegulatoryCodeHistory on page 835
History is available for the object.

RegulatoryCodeUse

Represents a junction between a set of assessment questions and the regulatory code associated with them. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the regulatory code use record.
`ReferenceObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The record that's related to the regulatory code use record. This is a relationship field.

Field	Details
	Relationship Name ReferenceObject **Relationship Type** Lookup **Refers To** AssessmentQuestionVersion
`RegulatoryCodeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The regulatory code that's associated with the assessment question version. This is a relationship field. **Relationship Name** RegulatoryCode **Relationship Type** Lookup **Refers To** RegulatoryCode

RegCodeAssessmentInd

Represents the regulatory codes and the assessment indicator definitions associated with them. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`AssessmentIndDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description ID of the assessment indicator definition.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the regulatory code assessment indicator definition.
RegulatoryCodeId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the regulatory code.

Associated Objects

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

RegulatoryCodeAssessmentIndFeed **on page 826**
Feed is available for the object.

RegulatoryCodeAssessmentIndHistory **on page 835**
History is available for the object.

RegulatoryCodeViolation

Represents the transactional violation data that has been identified during an inspection. This entity ties the inspection question that is violated, violation reason and the regulatory code details. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`ComplianceDueDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Due date for regulatory code compliance.
`CorrectiveActionDescription`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Description of corrective action.
`DateCreated`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Date when the violation was created.
`DateResolved`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date when the violation was resolved.

Field	Details
DaysOpen	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** Number of days the violation was unresolved.
Description	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the violation.
InspectionAssmntIndId	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Id of the inspection assessment indicator associated with the regulatory code violation.
InspectionId	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Id of the inspection associated in which the violation was recorded.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.

Field	Details
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the violation
`OwnerId`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Priority of the violation. Possible values are: • `Critical` • `High` • `Low` • `Medium`
`RecurrenceCount`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** Number of times the violation has recurred.
`RegulatoryCodeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the regulation code.

Field	Details
`ResolutionNotes`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Notes related to violation resolution.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the violation. Possible values are: • `Open` • `Resolved`
`ViolationTypeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the violation type.

Associated Objects

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

RegulatoryCodeViolationChangeEvent on page 837 (API Version 58.0)
Change events are available for the object.

RegulatoryCodeViolationFeed
Feed tracking is available for the object.

RegulatoryCodeViolationHistory
History is available for the object.

RegulatoryCodeViolationOwnerSharingRule
Sharing rules are available for the object.

RegulatoryCodeViolationShare
Sharing is available for the object.

RegulatoryTrxnFee

Represents the association of regulatory transaction fees with your applications, inspections, or violations. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The business or personal account that the fee is calculated for.
`CalculationDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date when the fee is calculated.
`Comments`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Details about the fee.
`DueDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date the fee must be paid by.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date that a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date that a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the fee.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of the record.
ParentRecordId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent record such as the application, inspection, violation, or license that the fee is calculated for. The new Nillable property is available in API version 59.0 and later.
Status	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description Specifies the status of the fee. Possible values are: • CANCELED • DRAFT • DUE • PAID • PARTIALLY_PAID
TotalFeeAmount	**Type** currency **Properties** Filter, Nillable, Sort **Description** The sum of the fee.

Associated Objects

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

RegulatoryTrxnFeeFeed on page 826
Feed is available for the object.

RegulatoryTrxnFeeHistory on page 835
History is available for the object.

RegulatoryTrnxFeeOwnerSharingRule on page 832
Sharing rules are available for the object.

RegulatoryTrxnFeeShare on page 825
Sharing is available for the object.

RegulatoryTrxnFeeItem

Represents the storage of specific fee items associated with your regulatory transaction fees. This object is available in API version 51.0 and later.

Supported Calls

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

Fields

Field	Details
CalculationInfo	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** The basis for calculating the fee for a line item. For example, when an extra fee is charged, this field provides reasons for the charge.
Comments	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The additional details about a line item.
FeeAmount	**Type** currency **Properties** Create, Filter, Sort, Update **Description** The fee to be paid for a line item.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date that a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date that a user viewed this record.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update

Field	Details
	Description The name of the line item such as an inspection fee or an extra fee.
`RegulatoryTrxnFeeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The regulatory transaction fee associated with the line item.

Associated Objects

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

RegulatoryTrxnFeeItemFeed on page 826
Feed is available for the object.

RegulatoryTrxnFeeItemHistory on page 835
History is available for the object.

RegAuthorizationTypeProduct

Represents the association of authorization type and product. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when a user most recently viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** 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`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`ProductId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The product whose use is authorized. This field is a relationship field. **Relationship Name** Product **Relationship Type** Lookup **Refers To** Product2
`RegulatoryAuthorizationTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The regulatory authorization type associated with the corresponding product

Associated Objects

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

RegAuthorizationTypeProductFeed on page 826
Feed is available for the object.

RegAuthorizationTypeProductHistory on page 835
History is available for the object.

RegAuthorizationTypeProductOwnerSharingRule on page 832
Sharing rules are available for the object.

RegAuthorizationTypeProductShare on page 825
Sharing is available for the object.

SignatureTask

Represents the signature-related information that a visitor captures as part of a visit. 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()`

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the signature task.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the signature task.
`ParentTaskId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The assessment task that is associated with the signature task.

SignatureTaskLineItem

Represents a junction between a signature task and a digital signature captured in a visit. This object is available in API version 50.0 and later.

Supported Calls

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

Fields

Field	Details
`DigitalSignatureId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the digital signature collected in a visit.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the signature task line item.
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Assessment task or signature task associated with this line item.

Associated Objects

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

SignatureTaskLineItemFeed **on page 826**
Feed is available for the object.

SignatureTaskLineItemHistory **on page 835**
History is available for the object.

TagCategory

Group similar interest tags together into tag categories.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A detailed description of the tag category.
`Icon`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. Icon to visually represent your tag category.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Required. Indicates whether the tag category is still active (`true`) or has been dismissed (`false`). The default value is '`false`'.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Level`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Create a hierarchy of levels of tag categories.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the tag category.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the tag category. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentCategoryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user, account, or contact associated with the tag category. This is a relationship field. **Relationship Name** ParentCategory

Field	Details
	Relationship Type Lookup **Refers To** TagCategory

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.

TagCategoryFeed on page 826
Feed tracking is available for the object.

TagCategoryHistory on page 835
History is available for tracked fields of the object.

TagCategoryShare on page 825
Sharing is available for the object.

TimeSlot

Represents a range of time on a specified day of the week during which a provider or practitioner offers service. Operating hours consist of one or more time slots. Operating hours consist of one or more time slots.

Supported Calls

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

Special Access Rules

This object is available if Provider Management is enabled in your org. To access the object, you need the Provider Management Access permission set or the Provider Management permission set license. Partner users need the Provider Management for Partner permission set or permission set license.

Fields

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

Field Name	Details
	Description The day of the week when the time slot takes place.
`EndTime`	**Type** time **Properties** Create, Filter, Sort, Update **Description** The time when the time slot ends.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`OperatingHoursId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The operating hours that the time slot belongs to. An operating hours' time slots appear in the Operating Hours related list. This is a relationship field. **Relationship Name** OperatingHours **Relationship Type** Lookup **Refers To** OperatingHours

Field Name	Details
`StartTime`	**Type** time **Properties** Create, Filter, Sort, Update **Description** The time when the time slot starts.
`TimeSlotNumber`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the time slot. The name is auto-populated to a day and time format—for example, `Monday 9:00 AM - 10:00 PM`—but you can manually update it if you wish.
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of time slot. Possible values are *`Normal`* and *`Extended`*. You may choose to use *`Extended`* to represent overtime shifts.

Usage

Operating hours are composed of time slots, which indicate the hours of operation for a particular day. After you create operating hours, create time slots for each day. For example, if the operating hours should be 8 AM to 5 PM Monday through Friday, create five time slots, one per day. To reflect breaks such as lunch hours, create multiple time slots in a day: for example, *`Monday 8:00 AM - 12:00 PM`* and *`Monday 1:00 PM - 5:00 PM`*.

Tip: Time slots don't come with any built-in rules, but you can create Apex triggers that limit time slot settings in your org. For example, you may want to restrict the start and end times on time slots to half-hour increments, or to prohibit end times later than 8 PM.

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.

TimeSlotChangeEvent **on page 837**

Change events are available for the object.

TrainingCourseParticipant

Represents the trainings completed by a person. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the contact record of the individual taking the training.
`CourseOfferingId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the course offered.
`InstituitionName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the institution offereing the training.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the training course participant.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner.
`Result`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Result of the training course. Possible values are: • `Completed`

Associated Objects

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

TrainingCourseParticipantHistory
History is available for the object.

TrainingCourseParticipantShare
Share is available for the object.

TrainingCourseParticipantOwnerSharingRule **on page 832**
Sharing rule is available for the object.

TrainingCourseParticipantFeed
Feed tracking is available for the object.

TrnCourse

Represents information about the authorized trainings that qualify a license or permit. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the course.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the course.

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of this record.
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the course. Possible values are: • Active • Inactive
TotalCredits	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total credits offered for the course.
TotalHours	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Total hours needed to complete the course.

Associated Objects

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

TrnCourseOwnerSharingRule
Sharing rules are available for the object.

TrnCourseShare
Sharing is available for the object.

TrnCourseFeed **on page 826**
Feed is available for the object.

TrnCourseHistory on page 835
History is available for the object.

VettingEvaluation

Represents the evaluation of a candidate based on a vetting procedure. 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 if Talent Recruitment Management is enabled in your org. To access the object, you need one of these permission sets.

User Type	Permission Set
Internal Users	Talent Recruitment Management Specialist Access
Salesforce Platform Users	Talent Recruitment Management Hiring Manager Access OR Talent Recruitment Management Employee Access
Customer and Partner Community Users	Talent Recruitment Management Applicant Access

Fields

Field	Details
`ActionPlanId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the action plan for the vetting procedure that the vetting evaluation is based on. This field is a relationship field. **Relationship Name** ActionPlan **Refers To** ActionPlan

Field	Details
ApplicationFormId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the application form associated with the vetting evaluation. This field is a relationship field. **Relationship Name** ApplicationForm **Refers To** ApplicationForm
CandidateId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The vetted candidate. This field is a polymorphic relationship field. **Relationship Name** Candidate **Refers To** Account, Employee2
EffectiveEndDate	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the vetting evaluation is no longer effective.
EffectiveStartDate	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date when the vetting evaluation is effective.
LastReferencedDate	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the vetting evaluation.
`Outcome`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the outcome of the vetting evaluation. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User

Field	Details
ReferenceRecordId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reference record associated with the vetting evaluation. This field is a polymorphic relationship field. **Relationship Name** ReferenceRecord **Refers To** JobPosition, Position, RecruitmentRequisition
Status	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the status of the vetting evaluation. Picklist values for this field aren't predefined. Before you create a record, ensure that your Salesforce admin has defined picklist values according to your organization's requirements.
VettingEndDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The end date and time of the vetting evaluation. Available in API version 63.0 and later.
VettingStartDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The start date and time of the vetting evaluation. Available in API version 63.0 and later.

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.

VettingEvaluationFeed on page 826
Feed tracking is available for the object.

VettingEvaluationHistory on page 835
History is available for tracked fields of the object.

VettingEvaluationOwnerSharingRule on page 832
Sharing rules are available for the object.

VettingEvaluationShare on page 825
Sharing is available for the object.

ViolationEnforcementAction

Represents the action that a regulatory authority takes to address violations. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

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.

Field	Details
`CaseProceedingResultId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The outcome of a legal case for a participant. This field is a relationship field. **Relationship Name** CaseProceedingResult **Relationship Type** Lookup **Refers To** CaseProceedingResult

Field	Details
ComplianceDueDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Last date for compliance.
ComplianceDueDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Last date for compliance.
DateCreated	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Date when the action was created.
DateResolved	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Date when the action was resolved.
DaysOpen	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** Number of days the action was open.
Description	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of the enforcement action.

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the enforcement action.
`Priority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Priority of the enforcement action. Possible values are: • `Critical` • `High` • `Low` • `Medium`
`ResolutionNotes`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Notes related to the action resolution.

Field	Details
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Status of the enforcement action. Possible values are: • `Open` • `Resolved`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Type of the enforcement action. Possible values are: • `Citation` • `Citation warning` • `Civil Penalty` • `Corrected During Inspection` • `Notice of Violation`
`ViolationId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the violation. This field is a relationship field. **Relationship Name** Violation **Relationship Type** Master-detail **Refers To** RegulatoryCodeViolation

Associated Objects

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

ViolationEnforcementActionFeed on page 826
Feed tracking is available for the object.

ViolationEnforcementActionHistory on page 835
History is available for the object.

ViolationType

Represents violations types for licenses and permits. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Description of violation.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.

Field	Details
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the violation.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the owner of the record.
`Severity`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Severity of the violation. Possible values are: • `Issue` • `Major Violation` • `Minor Violation`
`Type`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The violation type. This field is unique within your organization. Possible values are: • `Building` • `Electrical` • `Health and Safety`

Associated Objects

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

ViolationTypeChangeEvent on page 837 (API Version 58.0)
Change events are available for the object.

ViolationTypeFeed
Feed tracking is available for the object.

ViolationTypeHistory on page 835
History is available for the object.

ViolationTypeOwnerSharingRule
Sharing rules are available for the object.

ViolationTypeShare
Sharing is available for the object.

ViolationTypeUse

Represents a junction between a set of assessment questions and the violation type associated with them. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description The name of the violation type use record.
`ReferenceObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The record associated with violation type use. This is a relationship field. **Relationship Name** ReferenceObject **Relationship Type** Lookup **Refers To** AssessmentQuestionVersion
`ViolationTypeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The violation type associated with the assessment question version. This is a relationship field. **Relationship Name** ViolationType **Relationship Type** Lookup **Refers To** ViolationType

ViolationTypeAssessmentInd

Represents violation types associated with assessment indicator definitions. This object is available in API version 49.0 and later.

Supported Calls

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

Fields

Field	Details
AssessmentIndDefinitionId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the assessment indicator definition.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the violation type assessment indicator.
ViolationTypeId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the violation type.

Associated Objects

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

ViolationTypeAssessmentIndFeed on page 826
Feed is available for the object. This object is available in API version 51.0 and later.

ViolationTypeAssessmentIndHistory on page 835
History is available for the object. This object is available in API version 51.0 and later.

Visit

Represents a visit to inspect, assess compliance, or assess an applicant's ability to get a license or permit or inspect. This object is available in API version 47.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountID`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The account that is associated with a visit. This field is available in API versions 48.0 and later.
`ActualVisitEndTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort **Description** The date and time when the visit ended.
`ActualVisitStartTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort **Description** The date and time when the visit started.
`ContextId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The purpose of a visit, such as business license application, or complaint. This field is available in API versions 48.0 and later.
`InspectionOverview`	**Type** textarea **Properties** Create, Nillable, Update **Description** The Einstein-generated historical overview of current and previous inspection visits. Available in API versions 62.0 and later. Einstein Generative AI for Public Sector Solutions must be enabled.
`InstructionDescription`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Special instructions provided by a compliance manager or an administrator.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort

Field	Details
	Description Unique identifier for the visit record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the visit record owner.
ParentVisitId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent visit associated with the current visit. This field is a relationship field. Available in API version 61.0 and later. **Relationship Name** ParentVisit **Relationship Type** Lookup **Refers To** Visit
PlaceId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the place that inspector visits.
PlannedVisitEndTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the visit is expected to end.
PlannedVisitStartTime	**Type** dateTime

Field	Details
	Properties Create, Filter, Sort, Update **Description** The date and time when the visit is expected to start.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The status of the visit. Possible values are: • `Abandoned` • `Completed` • `InProgress` • `Planned`
`StatusRemarks`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The reasons for abandoning or completing the visit as provided by the inspector.
`VisitPriority`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The priority of the visit. Possible values are: • `High` • `Low` • `Medium`
`VisitorId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description ID of the inspector visiting the store.

Associated Objects

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

VisitFeed on page 826
Feed tracking is available for the object.

VisitHistory on page 835
History is available for tracked fields of the object.

VisitShare on page 825
Sharing is available for the object.

Visitor

Represents the inspectors performing inspection visits. 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
`AssigneeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Lookup to the person assigned as the visitor. This field is a polymorphic relationship field. **Relationship Name** Assignee **Relationship Type** Lookup **Refers To** Contact, User

Field	Details
`IsPrimaryResource`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the visitor is the primary visitor for a visit. The default value is `false`.
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the user is a required visitor for the visit. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the visitor.
`VisitId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description Lookup to the Visit record this visitor is associated with. This field is a relationship field. **Relationship Name** Visit **Relationship Type** Lookup **Refers To** Visit

VisitedParty

Represents the contact person at the account that's being visited. 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
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. Lookup to the person assigned as the contact at an account. This field references the `Contact` object.
`IsPrimaryContact`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the person is the primary visited party.
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the visited party.
`VisitId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. Lookup to the `Visit` record this person is associated with.

Associated Objects

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

VisitedPartyHistory
History is available for the object.

VisitedPartyFeed
Feed tracking is available for the object.

VolunteerProject

Represents information about activities that must be carried out within a certain time frame, at a specified location, by one or more volunteers.

Supported Calls

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

Fields

Field	Details
`CancelationReason`	**Type** textarea **Properties** Create, Nillable, Update **Description** The reason why this volunteer opportunity was canceled.
`CanceledById`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** Lookup to the user, person account, or contact who canceled this volunteer project.
`CanceledTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date and time when the volunteer opportunity was canceled.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the volunteer project.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Required. The date and time when the volunteer project ended.

Field	Details
ExternalDescription	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description that appears when this volunteer project is published on the community.
IsPublishedOnWeb	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the volunteer project is published on the community.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user accessed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
LocationId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Lookup to the location of this volunteer project.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the volunteer project.

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Lookup to the user who owns this volunteer project.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Required. The date and time when the volunteer project starts.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. The current status of the volunteer project. Possible values are: • `Active` • `Canceled` • `Completed`
`VolunteersRequired`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** Required. The number of volunteers required for the volunteer project.

WorkerCompCoverageClass

Represents the compensation coverage class that a worker belongs to. 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

To access this object on your Public Sector Solutions org, Benefit Disbursement must be enabled and you must have the Benefit Disbursement Access permission set or the Benefit Disbursement permission set license.

Fields

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

Field	Details
	Description The name of the compensation coverage class.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the record owner. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Premium`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The premium for the insurance policy that covers this compensation coverage class.
`TotalExposure`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The payroll that the employees of this compensation coverage class belong to.
`WorkerClass`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The code that represents the compensation class of the employees. Possible values are: • `1701 Abrasive Wheel Mfg. & Drivers` • `1748 Abrasive Wheel Mfg. & Drivers` • `1860 Abrasive Paper or Cloth Preparation`

Field	Details
`WorkerCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of employees in this compensation coverage class.
`WorkerLocationId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location where the worker is employed. This field is a relationship field. **Relationship Name** WorkerLocation **Relationship Type** Lookup **Refers To** AssociatedLocation

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.

WorkerCompCoverageClassFeed on page 826
Feed tracking is available for the object.

WorkerCompCoverageClassHistory on page 835
History is available for tracked fields of the object.

WorkerCompCoverageClassOwnerSharingRule on page 832
Sharing rules are available for the object.

WorkerCompCoverageClassShare on page 825
Sharing is available for the object.

CHAPTER 3 PublicSectrSltn Namespace

In this chapter ...

- AssessmentResponses Class
- BenefitDisbursementAdjDetail Class
- BenefitDisbursementDetail Class
- BenefitDisbursementIAOutput Class
- CreateOutboundReferral Class
- GetAccountsAndContacts Class

The `PublicSectrSltn` namespace provides classes for Public Sector Solutions.

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

AssessmentResponses Class

Use this class to store dynamic assessment responses Public Sector Solutions in the Assessment and AssessmentQuestionResponse standard objects.

Namespace

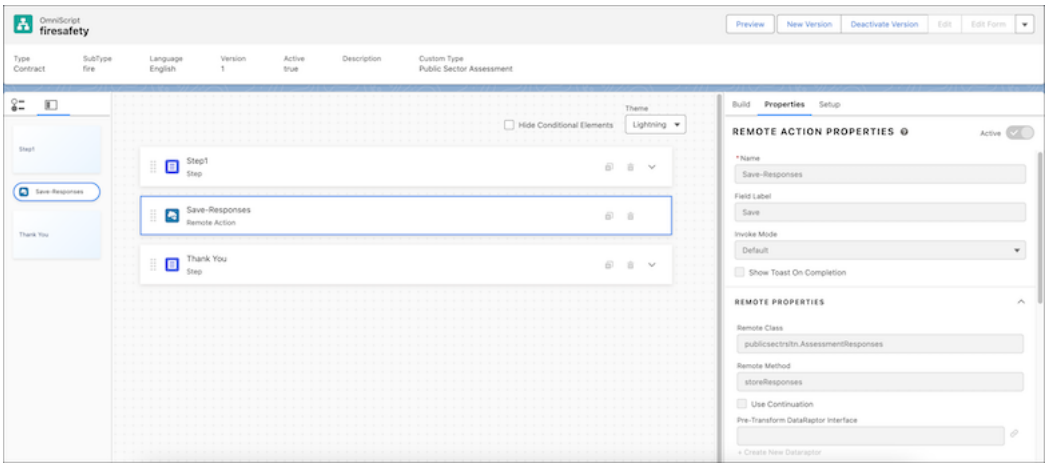
PublicSectrSltn

Usage

To save assessment responses from the runtime Omniscript on the Omni Assessment Task page to the `AssessmentResponses` class, implement the `VlocityOpenInterface` interface.

Specify the implemented Apex class name in the Remote Actions section of the OmniScript page. A Remote Action calls the specified Apex class and its method to save the assessment form in the Assessment and AssessmentQuestionResponse Salesforce objects.

This screenshot shows the Apex class name and its method as specified in the Omniscript Remote Action Properties section:



Special Access Rules

Public Sector and Dynamic Assessment permission sets are required to use this Apex class.

Example

```
global class OmniSave implements <Vlocity_Namespace>.VlocityOpenInterface {
   public Boolean invokeMethod(String methodName, Map<String,Object> input,
Map<String,Object> output, Map<String,Object> options){
      PublicSectrSltn.AssessmentResponses.storeResponses(input,output,options);
      return true;
   }
}
```

For more information on the `VlocityOpenInterface` interface, see OmniStudio Foundation Guide.

AssessmentResponses Methods

AssessmentResponses Methods

The following is a method for `AssessmentResponses`.

storeResponses(input, output, options)
Stores the assessment responses.

`storeResponses(input, output, options)`

Stores the assessment responses.

Signature

```
public static void storeResponses(Map<String,Object> input, Map<String,Object> output,
Map<String,Object> options)
```

Parameters

input
Type: Map<String,Object>

Contains the context ID, assessment response in JSON format, and extra payload details from configurations from Vlocity OmniScript.

output
Type: Map<String,Object>

Reserved for future use.

options
Type: Map<String,Object>

Contains the assessment name and assessment status that are configured in OmniScript.

Return Value

Type: Void

BenefitDisbursementAdjDetail Class

This class contains the benefit disbursement adjustment details for the eligible benefit assignment.

Namespace

PublicSectrSltn

BenefitDisbursementAdjDetail Properties

BenefitDisbursementAdjDetail Properties

`BenefitDisbursementAdjDetail` has these properties.

adjustmentAmount
The adjustment amount of the benefit disbursement adjustment.

adjustmentReason
The reason for the benefit disbursement adjustment.

baaId
The ID of the benefit assignment adjustment record that the record is being created for or previewed against.

id
The ID of the benefit disbursement adjustment record that is created.

adjustmentAmount

The adjustment amount of the benefit disbursement adjustment.

Signature

```
public Double adjustmentAmount {get; set;}
```

Property Value

Type: Double

adjustmentReason

The reason for the benefit disbursement adjustment.

Signature

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

Property Value

Type: String

baaId

The ID of the benefit assignment adjustment record that the record is being created for or previewed against.

Signature

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

Property Value

Type: String

`id`

The ID of the benefit disbursement adjustment record that is created.

If the `isPreviewMode` parameter is set to `true`, the value of this field is null.

Signature

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

Property Value

Type: String

BenefitDisbursementDetail Class

This class contains the benefit disbursement details for an eligible benefit assignment.

Namespace

PublicSectrSltn

BenefitDisbursementDetail Properties

BenefitDisbursementDetail Properties

`BenefitDisbursementDetail` has these properties.

adjustmentAmount
The adjustment amount of the benefit disbursement, which is the total of all the adjustment amounts for the benefit disbursement adjustment records.

approvalStatus
The approval status of the benefit disbursement that is created or previewed.

benefitDisbursementAdjs
Lists the benefit disbursement adjustment details.

category
The category of the benefit assignment.

endDate
The end date of the benefit disbursement.

entitlementAmount
The entitlement amount of the benefit disbursement.

id
The ID of the benefit disbursement record that is created.

payoutAmount
The payout amount of the benefit disbursement, which is the total of the entitlement and adjustment amounts.

recipientId
The ID of the recipient of the benefit disbursement.

startDate
The start date of the benefit disbursement.

adjustmentAmount

The adjustment amount of the benefit disbursement, which is the total of all the adjustment amounts for the benefit disbursement adjustment records.

Signature

```
public Double adjustmentAmount {get; set;}
```

Property Value

Type: Double

approvalStatus

The approval status of the benefit disbursement that is created or previewed.

The default values are:

- `Approved`
- `In Review`
- `Not Applicable`
- `Pending`
- `Rejected`

Salesforce administrators can define these values.

Signature

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

Property Value

Type: String

benefitDisbursementAdjs

Lists the benefit disbursement adjustment details.

Signature

```
public List<publicsectrsltn.BenefitDisbursementAdjDetail> benefitDisbursementAdjs {get;
set;}
```

Property Value

Type: List<publicsectrsltn.BenefitDisbursementAdjDetail>

category

The category of the benefit assignment.

Signature

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

Property Value

Type: String

endDate

The end date of the benefit disbursement.

Signature

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

Property Value

Type: Datetime

entitlementAmount

The entitlement amount of the benefit disbursement.

Signature

```
public Double entitlementAmount {get; set;}
```

Property Value

Type: Double

id

The ID of the benefit disbursement record that is created.

If the `isPreviewMode` parameter is set to `true`, the value of this field is null.

Signature

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

Property Value

Type: String

payoutAmount

The payout amount of the benefit disbursement, which is the total of the entitlement and adjustment amounts.

Signature

```
public Double payoutAmount {get; set;}
```

Property Value

Type: Double

recipientId

The ID of the recipient of the benefit disbursement.

Signature

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

Property Value

Type: String

startDate

The start date of the benefit disbursement.

Signature

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

Property Value

Type: Datetime

BenefitDisbursementIAOutput Class

This class contains details about the disbursement for the eligible benefit assignment that is created or is to be previewed.

Namespace

PublicSectrSltn

Usage

The CreateBenefitDisbursement action returns the `BenefitDisbursementIAOutput` class, an Apex output type that contains nested arrays . This output representation contains an array of the `BenefitDisbursementDetail` fields. An array of `BenefitDisbursementAdjDetail` is contained in `BenefitDisbursementDetail`.

BenefitDisbursementIAOutput Properties

BenefitDisbursementIAOutput Properties

`BenefitDisbursementIAOutput` has these properties.

benefitAssignmentId
The ID of the eligible benefit assignment that is specified in the CreateBenefitDisbursement action.

benefitDisbursements
The details of the benefit disbursement for the specified benefit assignment.

isPreviewMode
Indicates whether preview disbursement details are available (`true`) or whether disbursement records are created (`false`), as specified in the CreateBenefitDisbursement action.

`benefitAssignmentId`

The ID of the eligible benefit assignment that is specified in the CreateBenefitDisbursement action.

Signature

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

Property Value

Type: String

`benefitDisbursements`

The details of the benefit disbursement for the specified benefit assignment.

Signature

```
public List<publicsectrsltn.BenefitDisbursementDetail> benefitDisbursements {get; set;}
```

Property Value

Type: List<publicsectrsltn.BenefitDisbursementDetail>

`isPreviewMode`

Indicates whether preview disbursement details are available (`true`) or whether disbursement records are created (`false`), as specified in the CreateBenefitDisbursement action.

Signature

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

Property Value

Type: Boolean

CreateOutboundReferral Class

Use this class to create an outbound referral record.

Namespace

PublicSectrSltn

Special Access Rules

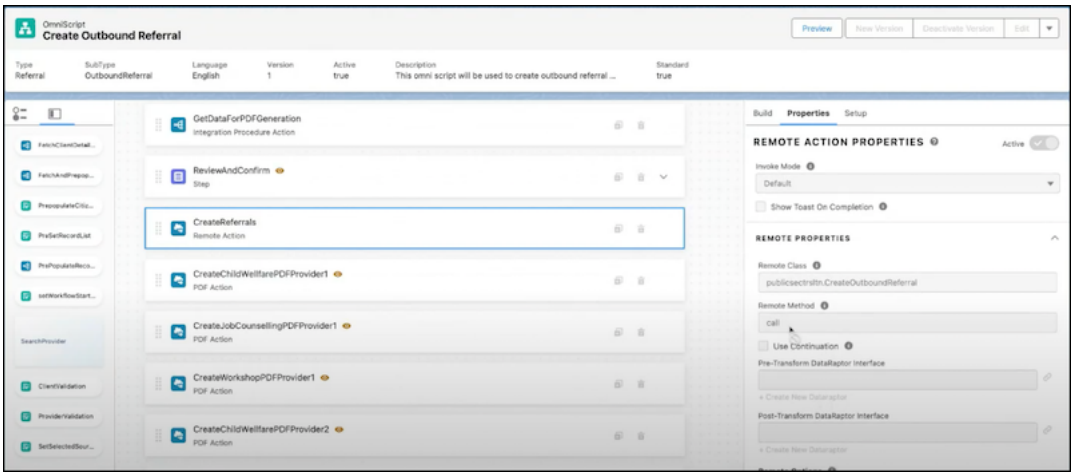
This Apex class is available to use with the Provider Management and Provider Search features enabled in your Salesforce org.

Usage

The `CreateOutboundReferral` class uses the default `call(String action, Map<String, Object> args)` method of the `Callable` interface. For more information on the `Callable` interface and its methods, see Callable Interface.

Specify the implemented `CreateOutboundReferral` class name in the CreateReferrals Remote Actions section of the Create Outbound Referral OmniScript page. A Remote Action calls the specified Apex class and its method to create the outbound referral records. This Apex class can create a maximum of up to three outbound referral records.

This screenshot shows how the Apex class name and its method are specified in Omniscript Remote Action:



Example

The `CreateOutboundReferral` remote action accepts a JSON object with the following format as an input:

```
{
  "$schema": "http://json-schema.org/draft-04/schema#",
  "type": "object",
  "properties": {
    "ReferralInformation": {
      "type": "object",
      "properties": {
        "ReferrerName": {
          "type": "string | name of the User creating Referral"
        },
        "ReferrerEmail": {
          "type": "string | email of the user creating Referral"
        },
        "ClientId": {
          "type": "string | AccountId of the client"
        },
        "ClientPhone": {
          "type": "string | Phone number of the client"
        },
        "ClientName": {
          "type": "string | Client name"
        },
        "IsSelfReferred": {
          "type": "boolean | True if Referral referring to own provider"
        },
        "ResultCategory": {
          "type": "string | Referral.ResultCategory picklist option"
        },
        "UsageType": {
          "type": "string | Referral.UsageType picklist option"
        },
        "ReferrerOrg": {
          "type": "string | Current Organization nickname, autofilled by omniscript"
        },
```

```
        "Title": {
          "type": "string | Title of the Referral"
        },
        "ReferralType": {
          "type": "string | Referral.ReferralType picklist option"
        },
        "Priority": {
          "type": "string | Referral.Priority picklist option"
        },
        "Description": {
          "type": "string | Referral.Description"
        },
        "Category": {
          "type": "string | Referral.Category picklist option"
        },
        "ReferralDate": {
          "type": "string | Referral.ReferralDate value"
        },
        "Status": {
          "type": "string | Referral.Status picklist option"
        }
      }
    },
    "ProviderInfoForReferral": {
      "type": "array",
      "items": [
        {
          "type": "object",
          "properties": {
            "ProviderFacilityId": {
              "type": "string | Selected Healthcare Practitioner Facility record id"
            },
            "ProviderPhone": {
              "type": "string | Provider phone in case unregistered provider is referred"

            },
            "ProviderId": {
              "type": "string | Selected Healthcare Provider record id"
            },
            "ProviderEmail": {
              "type": "string | Provider email in case unregistered provider is referred"

            }
          }
        }
      ]
    },
    "ReferralDetails": {
      "type": "object",
      "properties": {
        "ReferralTitle": {
          "type": "string | Title of the Referral"
        },
        "Priority": {
```

```
          "type": "string | Referral.Priority picklist option"
        },
        "Status": {
          "type": "string | Referral.Status picklist option"
        },
        "Category": {
          "type": "string | Referral.Category picklist option"
        },
        "Date": {
          "type": "string | Referral.ReferralDate value"
        },
        "ReferralDescription": {
          "type": "string | Referral.Description value"
        },
        "File1": {
          "type": "array",
          "items": [
            {
              "type": "object",
              "properties": {
                "data": {
                  "type": "string | ContentDocument record id for uploaded file"
                },
                "deleteLabel": {
                  "type": "string"
                },
                "filename": {
                  "type": "string | filename of uploaded file"
                },
                "size": {
                  "type": "string | size of uploaded file"
                },
                "vId": {
                  "type": "string | ContentDocument Version record Id"
                }
              }
            }
          ]
        }
      }
    },
    "SourceDocuments": {
      "type": "array",
      "items": [
        {
          "type": "object",
          "properties": {
            "Id": {
              "type": "string | ContentDocument record id for attached file"
            },
            "Title": {
              "type": "string | ContentDocument Title record id for attached file"
            },
            "FileExtension": {
```

```
              "type": "string | ContentDocument file extension for attached file"
            },
            "DocumentFullName": {
              "type": "string | ContentDocument filename for attached file."
            }
          }
        }
      ]
    }
  },
  "required": [
    "ReferralInformation",
    "ProviderInfoForReferral",
    "ReferralDetails",
    "SourceDocuments"
  ]
}
```

Here's an example of the JSON object that the `CreateOutboundReferral` Apex class receives as input.

```
{
  "ReferralInformation": {
    "ReferrerName": "Admin User",
    "ReferrerEmail": "robert.l@xyz.com",
    "ClientId": "001B000001UFMjcIAH",
    "ClientPhone": "4159017000",
    "ClientName": "Glen Marshal",
    "IsSelfReferred": false,
    "ResultCategory": "Pending",
    "UsageType": "PublicSectorSolutions",
    "ReferrerOrg": "pssdevgs0",
    "Title": "Referral Title",
    "ReferralType": "Outbound",
    "Priority": "Critical",
    "Description": "Referral Description",
    "Category": "Child Abuse",
    "ReferralDate": "2024-01-15",
    "Status": "In Review"
  },
  "ProviderInfoForReferral": [
    {
      "ProviderFacilityId": "0bSB00000009L8rMAE",
      "ProviderPhone": "practitioner-phone",
      "ProviderId": "0cmB0000000DxpxIAC"
    },
    {
      "ProviderFacilityId": "0bSB00000009Q2mMAE",
      "ProviderPhone": "practitioner-phone",
      "ProviderId": "0cmB0000000E64nIAC"
    },
    {
      "ProviderEmail": "provilder@email.test.com",
      "ProviderPhone": "1111111111"
    }
  ],
```

```
  "ReferralDetails": {
    "ReferralTitle": "Referral Title",
    "Priority": "Critical",
    "Status": "In Review",
    "Category": "Child Abuse",
    "Date": "2024-01-15",
    "ReferralDescription": "Referral Description",
    "File1": [
      {
        "data": "069xx0000004C92AAE",
        "deleteLabel": "Delete TestPDF_For_Upload.pdf",
        "filename": "TestPDF_For_Upload.pdf",
        "size": "103266",
        "vId": "068xx0000004C92AAE"
      },
      {
        "data": "069xx0000004CAeAAM",
        "deleteLabel": "Delete SchemeInfo.pdf",
        "filename": "SchemeInfo.pdf",
        "size": "555524",
        "vId": "068xx0000004CAeAAM"
      }
    ]
  },
  "SourceDocuments": [
    {
      "Id": "0691Q00000YWEmUQAX",
      "Title": "TestPDF_For_Upload",
      "FileExtension": "pdf",
      "DocumentFullName": "TestPDF_For_Upload.pdf"
    }
  ]
}
```

Here's an example of the JSON object that the `CreateOutboundReferral` Apex class response returns, which contain an array of referral IDs.

```
{
  "referralIds": [
    "0wi1Q0000008VraQAE",
    "0wi1Q0000008VrbQAE",
    "0wi1Q0000008VrcQAE"
  ]
}
```

GetAccountsAndContacts Class

This class contains a method that returns a list of the person accounts, business accounts, and contacts.

Namespace

PublicSectrSltn

Special Access Rules

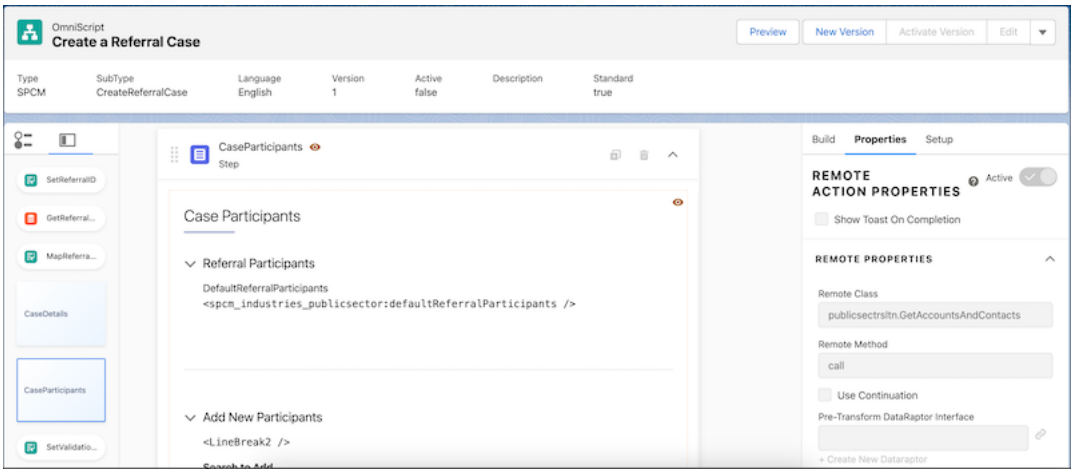
Case Referral and Complaints Management Access permission sets are required to use this Apex class. Person Accounts must be enabled to retrieve the person accounts.

Usage

The `GetAccountsAndContacts` class is implemented in the Case Participants section of the Create a Referral Case page in OmniScript.

Specify the Apex class name in the Remote Actions section of the OmniScript page. A Remote Action calls the specified Apex class and its method to retrieve the accounts and contacts.

This screenshot shows how to specify the Apex class name in Remote Actions:



GetAccountsAndContacts Methods

GetAccountsAndContacts Methods

The following are methods for `GetAccountsAndContacts`.

invokeMethod(methodName, input, output, options)

Returns a list of person accounts, business accounts, and contacts based on the specified first name, last name, and city. The method performs a partial or full search based on the input to return the list that matches the criteria.

`invokeMethod(methodName, input, output, options)`

Returns a list of person accounts, business accounts, and contacts based on the specified first name, last name, and city. The method performs a partial or full search based on the input to return the list that matches the criteria.

Signature

```
public static Boolean invokeMethod(String methodName, Map<String,ANY> input,
Map<String,ANY> output, Map<String,ANY> options)
```

Parameters

`methodName`

Type: String

Reserved for future use.

`input`

Type: Map<String,ANY>

Reserved for future use.

`output`

Type: Map<String,ANY>

Contains the list of person accounts, business accounts, and contacts that are returned by the method.

`options`

Type: Map<String,ANY>

Contains partial or full search terms to find for the matched person accounts, business accounts, and contacts.

Valid search terms for accounts and contacts:

- BusinessAccount—`Name` and `ShippingCity`
- Contact—`FirstName`, `LastName`, and `MailingCity`
- PersonAccount—`FirstName`, `LastName`, and `ShippingCity`

Return Value

Type: Boolean

Returns a Boolean value indicating whether the method returned the list of accounts and contacts (`true`) or not (`false`).

CHAPTER 4 Public Sector Solutions APIs

In this chapter ...

- REST Reference

Use the Public Sector Solutions Business APIs to create care plan templates and care plans.

Special Access Rules

To use care plans, users need the Care Plans Access and Benefit Management Access permission sets.

Available Resources

Resource	Description
`/connect/careplan/care-plans`	Use the POST request to create care plan records.
`/connect/careplan/care-plans/${carePlanId}`	Use the PATCH request to update a care plan record.
`/connect/careplan/care-plans/${carePlanId}`	Use the GET request to retrieve the care plan details.
`/connect/careplan/careplan-templates/${carePlanTemplateId}/actions/${actionType}`	Use the POST request to create care plan template records.
`/connect/careplan/careplan-templates/${carePlanTemplateId}`	Use the GET request to retrieve the care plan template details.
`/connect/careplan/definitions/${definitionId}`	Use the GET request to retrieve details about a specified definition record that is related to goal definition and the benefits of a care plan.

REST Reference

You can access Public Sector Solutions 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 Public Sector Solutions API resources.

Request Bodies
Here's a list of Public Sector Solutions API request bodies.

Response Bodies
Here's a list of Public Sector Solutions API response bodies.

Resources

Here's a list of Public Sector Solutions API resources.

Action Plan Templates (GET, POST)
API to create and get Action Plan Template items. An Action Plan Template has a default set of parameters required to create an Action Plan.

Care Plans (GET, PATCH)
Retrieve the care plan details. Fetches benefit assignments and goal assignments associated with the given care plan. Update a care plan record.

Care Plans (POST)
Create care plan records. Associate benefit assignments and goal assignments when creating a care plan.

Care Plan Definitions (GET)
Retrieve details about a specified definition record that is related to goal definition and the benefits of a care plan.

Care Plan Templates (GET)
Retrieve the care plan template details. Fetches the care plan template benefits and care plan template goals associated with the given care plan template.

Care Plan Templates (POST)
Create care plan template records. Associate the benefits and goals with the care plan template.

Benefit Disbursements (POST)
Create benefit disbursements for a benefit session to disburse benefits to participants enrolled in the benefit session.

Benefit Sessions of a Care Plan (GET)
Get the details of benefit sessions enrolled by participants in a care plan.

Action Plan Templates (GET, POST)

API to create and get Action Plan Template items. An Action Plan Template has a default set of parameters required to create an Action Plan.

Resource

```
/connect/action-plan/actionplantemplateversion/${actionPlantemplateId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/63.0/connect/action-plan/actionplantemplateversion/0PTS60000004C9DOAU?allowOverrides=true
```

Available version

57.0

Requires Chatter

No

HTTP methods

GET, POST

Response body for GET

Action Plan Template Items

Request parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
`shouldAllowOverride`	Boolean	Indicates whether the Action Plan to be created from the Action Plan Template overrides the default parameters of the template (`true`) or not (`false`).	Optional	57.0

Request body for POST

JSON example

```
{
   "targetId":"07rS60000004CAUIA2",
   "name":"Goal Assignment Action Demo",
   "excludedItems":{
      "records":[
         "0PJS60000004CA1OAM"
      ]
   },
   "updateableItems":{
      "tasks":{
         "records":[
            {
               "id":"BSHS60000004CA1OQA",
               "subject":"Onboarding Mandatory Training",
               "dueDate":"30-01-2022",
               "status":"Completed",
               "priority":"High",
               "comment":"Mandatory trainings for the new hires",
               "assignedTo":"0YwS60000004IByKAM"
            }
         ]
      }
```

```
    },
    "adhocItems":{
       "tasks":{
          "records":[
             {
                "subject":"Salesforce Platform Basics Training",
                "dueDate":"20-02-2023",
                "status":"In Progress",
                "priority":"Normal",
                "comment":"Learn the Salesforce Platform basics",
                "assignedTo":"0BsS60000004IByRAM",
                "isRequired":"False"
             }
          ]
       }
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`adhocItems`	Action Plan Item Tasks Input	Details of the action plan items to be created. Note: Applicable only when the `shouldAllowOverride` is set to true.	Optional	57.0
`excludedItems`	String[]	IDs of the action plan items to be removed. Note: Applicable only when the `shouldAllowOverride` is set to true.	Optional	57.0
`name`	String	Name of the action plan.	Required	57.0
`targetId`	String	Target ID of the action plan.	Required	57.0
`updateableItems`	Action Plan Item Tasks Input	Action plan items to be updated. Note: Applicable only when the `shouldAllowOverride` is set to true.	Optional	57.0

Response body for POST

Action Plan Output

Care Plans (GET, PATCH)

Retrieve the care plan details. Fetches benefit assignments and goal assignments associated with the given care plan. Update a care plan record.

Resource

```
/connect/careplan/care-plans/${carePlanId}
```

Resource example

```
https://yourInstance.salesforce.com/services/data/63.0
/connect/careplan/care-plans/1spRM0000004CDZYA2
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET, PATCH

PATCH is available in version 56.0 and later.

Response body for GET

Care Plan Output

Request body for PATCH

Root XML tag

`<CarePlan>`

Properties

Name	Type	Description	Required or Optional	Available Version
benefitAssignments	Benefit Assignment Input[]	Details of the benefit assignment information of the care plan.	Optional	55.0
carePlanTasks	Care Plan Tasks Input	Task details of a care plan.	Optional	56.0
carePlanTemplateId	String	ID of the service plan template associated with the care plan.	Optional	55.0
caseId	String	Case associated with the care plan.	Required	55.0
customFields	Custom Field Input[]	Custom fields details of a care plan.	Optional	56.0
description	String	Description of the care plan record.	Optional	55.0
endDate	String	Date until when the care plan is effective.	Optional	55.0
goalAssignments	Goal Assignment Input[]	Represents the goal assignment information of the care plan.	Optional	55.0
id	String	ID of the care plan record.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
name	String	Name of the care plan record.	Required	55.0
participantId	String	ID of the account associated with the care plan.	Optional	55.0
problems	Problem Definition Input[]	Details of the problems associated with the care plan.	Required	57.0
startDate	String	Date from when the care plan is effective.	Optional	55.0
status	String	Status of the care plan.	Required	55.0

JSON example

```
{
  "id": "1spxx000000026fAAA",
  "name": "CP-(-678",
  "participantId": "001xx000003HTqdAAG",
  "status": "Draft",
  "description": "CP Created from workbench",
  "startDate": "2022-04-15T20:00:00.000Z",
  "endDate": "2025-04-15T20:00:00.000Z",
  "caseId": "500xx000000d0SXAAY",
  "carePlanTemplateId": "1stxx0000000149AAA",
  "goalAssignments": {
    "records": [
      {
        "startDate": "2022-07-05T00:00:00.000Z",
        "targetCompletionDate": "2022-07-09T00:00:00.000Z",
        "completionPercentage": 34,
        "status": "In Progress",
        "goalDefinitionId": "1gdxx0000000G1ZAAU",
        "id": "1pgxx00000000zJAAQ",
        "priority": "High",
        "customFields": {
          "records": []
        },
        "goalAssignmentTasks": {
          "excludedTasks": {
            "tasks": [
              "00Txx000003rMTaEAM",
              "00Txx000003rMTxEAM",
              "00Txx000003rMTdEAM"
            ]
          },
          "adhocTasks": {
            "records": [
              {
                "subject": "GA Adhoc Task 14567deesfdf",
                "dueDate": "2022-09-08T00:00:00.000Z",
                "status": "Not Started",
```

```
          "priority": "Low",
          "comment": "First BA Adhoc task 34567",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "GA Adhoc Task 2345sdsd",
          "dueDate": "2022-12-08T00:00:00.000Z",
          "status": "In Progress",
          "priority": "High",
          "comment": "Second Adhoc task 5678asdsfdas",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "GA Adhoc Task 34567sadsd",
          "dueDate": "2022-11-08T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Medium",
          "comment": "Third Adhoc task 123456sadadasdasd",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "GA Adhoc Task 44567sadwqdwqd",
          "dueDate": "2022-08-10T00:00:00.000Z",
          "status": "Not Started",
          "priority": "High",
          "comment": "Fourth Adhoc task 34567sdsadasdasd",
          "assignedTo": "005xx000001YkA1AAK"
        }
      ]
    },
    "tasks": {
      "records": [
        {
          "subject": "Update CP Edit GOAL ASSIGNEMENT Task 990",
          "dueDate": "2022-19-08T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Low",
          "comment": "Update CP Edit GOAL ASSIGNEMENT Task 990",
          "assignedTo": "005xx000001YkA1AAK",
          "id": "00Txx000003rMTcEAM"
        },
        {
          "subject": "Update CP Edit GOAL ASSIGNMENT ADHOC TASK Task 7686970",

          "dueDate": "2022-19-08T00:00:00.000Z",
          "status": "In Progress",
          "priority": "High",
          "comment": "Update CP Edit GOAL ASSIGNMENT ADHOC TASK Task 7686970",

          "assignedTo": "005xx000001YkA1AAK",
          "id": "00Txx000003rMTuEAM"
        }
      ]
    }
```

```
      }
    },
    {
      "startDate": "2022-07-05T00:00:00.000Z",
      "targetCompletionDate": "2022-07-09T00:00:00.000Z",
      "completionPercentage": 78,
      "goalAssigneeId": "001xx000003HTqdAAG",
      "goalDefinitionId": "1gdxx0000000FzxAAE",
      "id": "1pgxx00000000zKAAQ",
      "priority": "Medium",
      "customFields": {
        "records": []
      },
      "goalAssignmentTasks": {
        "excludedTasks": {
          "tasks": [
            "00Txx000003rMTyEAM",
            "00Txx000003rMTXEA2",
            "00Txx000003rMTZEA2"
          ]
        },
        "adhocTasks": {
          "records": [
            {
              "subject": " GA Adhoc Task 14567dawasfdasf",
              "dueDate": "2022-09-08T00:00:00.000Z",
              "status": "Not Started",
              "priority": "Low",
              "comment": "First GA Adhoc task 34567asdasdfdasfdaf",
              "assignedTo": "005xx000001YkA1AAK"
            },
            {
              "subject": "BA Adhoc Task 2345wewrw",
              "dueDate": "2022-12-08T00:00:00.000Z",
              "status": "In Progress",
              "priority": "High",
              "comment": "Second Adhoc task 5678",
              "assignedTo": "005xx000001YkA1AAK"
            },
            {
              "subject": "BA Adhoc Task 3456713eqasdasfddf",
              "dueDate": "2022-11-08T00:00:00.000Z",
              "status": "Not Started",
              "priority": "Medium",
              "comment": "Third Adhoc task 123456",
              "assignedTo": "005xx000001YkA1AAK"
            },
            {
              "subject": "BA Adhoc Task 44567wqewqewqr",
              "dueDate": "2022-08-10T00:00:00.000Z",
              "status": "Not Started",
              "priority": "High",
              "comment": "Fourth Adhoc task 34567",
              "assignedTo": "005xx000001YkA1AAK"
```

```
            }
          ]
        },
        "tasks": {
          "records": [
            {
              "subject": "Update CP Edit GOAL ASSIGNEMENT Task 123124334",
              "dueDate": "2022-19-08T00:00:00.000Z",
              "status": "Not Started",
              "priority": "Low",
              "comment": "Update CP Edit GOAL ASSIGNEMENT Task 213213414",
              "assignedTo": "005xx000001YkA1AAK",
              "id": "00Txx000003rMTYEA2"
            },
            {
              "subject": "Update CP Edit GOAL ASSIGNMENT ADHOC TASK Task 7686970",

              "dueDate": "2022-19-08T00:00:00.000Z",
              "status": "In Progress",
              "priority": "High",
              "comment": "Update CP Edit GOAL ASSIGNMENT ADHOC TASK Task 7686970",

              "assignedTo": "005xx000001YkA1AAK",
              "id": "00Txx000003rMU1EAM"
            }
          ]
        }
      }
    }
  ]
},
"benefitAssignments": {
  "records": [
    {
      "enrollmentCount": 5,
      "entitlementAmount": 100,
      "participantId": "001xx000003HTqdAAG",
      "id": "0nDxx00000000uTEAQ",
      "benefitId": "0jixx00000000JNAAY",
      "customFields": {
        "records": []
      },
      "benefitAssignmentTasks": {
        "excludedTasks": {
          "tasks": [
            "00Txx000003rMTeEAM",
            "00Txx000003rMTfEAM",
            "00Txx000003rMTgEAM"
          ]
        },
        "adhocTasks": {
          "records": [
            {
              "subject": " BA Adhoc Task Rec1",
```

```
          "dueDate": "2022-09-08T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Low",
          "comment": "First BA Adhoc task Rec 1234",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "BA Adhoc Task Rec 232143",
          "dueDate": "2022-12-08T00:00:00.000Z",
          "status": "In Progress",
          "priority": "High",
          "comment": "Second Adhoc task Rec 121324325",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "BA Adhoc Task Rec 21325346457",
          "dueDate": "2022-11-08T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Medium",
          "comment": "Third Adhoc task Rec 2324234235",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "BA Adhoc Task Rec 1342432423",
          "dueDate": "2022-08-10T00:00:00.000Z",
          "status": "Not Started",
          "priority": "High",
          "comment": "Fourth Adhoc task Rec 2343242345",
          "assignedTo": "005xx000001YkA1AAK"
        }
      ]
    },
    "tasks": {
      "records": [
        {
          "subject": "Update CP Edit Benefit Task 440",
          "dueDate": "2022-19-08T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Low",
          "comment": "Update CP Edit Task 123243124 comment",
          "assignedTo": "005xx000001YkA1AAK",
          "id": "00Txx000003rMTiEAM"
        },
        {
          "subject": "Update CP Edit Benefit Task 900",
          "dueDate": "2022-19-08T00:00:00.000Z",
          "status": "In Progress",
          "priority": "High",
          "comment": "Update CP Edit Benefit Task 12312312321 comment",
          "assignedTo": "005xx000001YkA1AAK",
          "id": "00Txx000003rMThEAM"
        }
      ]
    }
```

```
        }
      }
    ]
  },
  "customFields": {
    "records": []
  },
  "carePlanTasks": {
    "excludedTasks": {
      "tasks": [
        "00Txx000003rMTnEAM",
        "00Txx000003rMTUEA2",
        "00Txx000003rMTVEA2"
      ]
    },
    "adhocTasks": {
      "records": [
        {
          "subject": "Adhoc Task Update CP 121312321",
          "dueDate": "2022-08-09T00:00:00.000Z",
          "status": "In Progress",
          "priority": "Low",
          "comment": "Adhoc Task Update CP 121312321",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "Adhoc Task Update CP wdsf12312321",
          "dueDate": "2022-08-31T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Low",
          "comment": "Adhoc Task Update CP wdsf12312321",
          "assignedTo": "005xx000001YkA1AAK"
        },
        {
          "subject": "Adhoc Task Update CP 21321312sdsd",
          "dueDate": "2022-08-08T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Low",
          "comment": "Adhoc Task Update CP 21321312sdsd",
          "assignedTo": "005xx000001YkA1AAK"
        }
      ]
    },
    "tasks": {
      "records": [
        {
          "subject": "Update CP Edit Task One",
          "dueDate": "2022-19-08T00:00:00.000Z",
          "status": "Completed",
          "priority": "High",
          "comment": "Update CP Edit Task One",
          "assignedTo": "005xx000001YkA1AAK",
          "id": "00Txx000003rMTWEA2"
        }
```

```
        ]
      }
    }
  }
```

Response body for PATCH

Generic Output

Care Plans (POST)

Create care plan records. Associate benefit assignments and goal assignments when creating a care plan.

Resource

```
/connect/careplan/care-plans
```

Resource example

```
https://yourInstance.salesforce.com/services/data/vXX.X
/connect/careplan/care-plans
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

`<CarePlan>`

Properties

Name	Type	Description	Required or Optional	Available Version
benefitAssignments	Benefit Assignment Input[]	Details of the benefit assignment information of the care plan.	Optional	55.0
carePlanTasks	Care Plan Tasks Input	Task details of a care plan.	Optional	56.0
carePlanTemplateId	String	ID of the service plan template associated with the care plan.	Optional	55.0
caseId	String	Case associated with the care plan.	Required	55.0
customFields	Custom Field Input[]	Custom fields details of a care plan.	Optional	56.0
description	String	Description of the care plan record.	Optional	55.0
endDate	String	Date until when the care plan is effective.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
goalAssignments	Goal Assignment Input[]	Represents the goal assignment information of the care plan.	Optional	55.0
id	String	ID of the care plan record.	Optional	55.0
name	String	Name of the care plan record.	Required	55.0
participantId	String	ID of the account associated with the care plan.	Optional	55.0
problems	Problem Definition Input[]	Details of the problems associated with the care plan.	Required	57.0
startDate	String	Date from when the care plan is effective.	Optional	55.0
status	String	Status of the care plan.	Required	55.0

JSON example

```
{
  "id": "",
  "name": "Care Plan Success Demo",
  "participantId": "001x0000008mGwlAAE",
  "status": "Active",
  "description": "CP Created from workbench",
  "startDate": "2022-04-15T20:00:00.000Z",
  "endDate": "2025-04-15T20:00:00.000Z",
  "caseId": "500x0000004mPTVAA2",
  "carePlanTemplateId": "1stx0000000002vAAA",
  "goalAssignments": {
    "records": [
      {
        "startDate": "2022-07-05T00:00:00.000Z",
        "targetCompletionDate": "2022-07-09T00:00:00.000Z",
        "completionPercentage": 34,
        "status": "In Progress",
        "goalDefinitionId": "1gdx000000000OLAAY",
        "goalAssigneeId": "001x0000008mGwlAAE",
        "priority": "High",
        "customFields": {
          "records": [
            {
              "fieldName": "BirthDate__c",
              "fieldValue": "1996-01-01"
            },
            {
              "fieldName": "RequestedAmount__c",
              "fieldValue": 5
            }
          ]
        },
```

```
      "goalAssignmentTasks": {
        "adhocTasks": {
          "records": [
            {
              "subject": " GA Adhoc Task 14567deesfdf",
              "dueDate": "2022-09-08T00:00:00.000Z",
              "status": "Not Started",
              "priority": "Low",
              "comment": "First BA Adhoc task 34567",
              "assignedTo": "005x0000000DecJ"
            },
            {
              "subject": "GA Adhoc Task 2345sdsd",
              "dueDate": "2022-12-08T00:00:00.000Z",
              "status": "In Progress",
              "priority": "High",
              "comment": "Second Adhoc task 5678asdsfdas",
              "assignedTo": "005x0000000DecJ"
            },
            {
              "subject": "GA Adhoc Task 34567sadsd",
              "dueDate": "2022-11-08T00:00:00.000Z",
              "status": "Not Started",
              "priority": "Medium",
              "comment": "Third Adhoc task 123456sadadasdasd",
              "assignedTo": "005x0000000DecJ"
            },
            {
              "subject": "GA Adhoc Task 44567sadwqdwqd",
              "dueDate": "2022-08-10T00:00:00.000Z",
              "status": "Not Started",
              "priority": "High",
              "comment": "Fourth Adhoc task 34567sdsadasdasd",
              "assignedTo": "005x0000000DecJ"
            }
          ]
        }
      }
    },
    {
      "startDate": "2022-07-05T00:00:00.000Z",
      "targetCompletionDate": "2022-07-09T00:00:00.000Z",
      "completionPercentage": 78,
      "goalAssigneeId": "001x0000008mGwlAAE",
      "goalDefinitionId": "1gdx00000000QnKAAU",
      "priority": "Medium",
      "customFields": {
        "records": [
          {
            "fieldName": "BirthDate__c",
            "fieldValue": "1998-01-01"
          },
          {
            "fieldName": "RequestedAmount__c",
```

```
            "fieldValue": 5
          }
        ]
      },
      "goalAssignmentTasks": {
        "adhocTasks": {
          "records": [
            {
              "subject": " GA Adhoc Task 14567dawasfdasf",
              "dueDate": "2022-09-08T00:00:00.000Z",
              "status": "Not Started",
              "priority": "Low",
              "comment": "First GA Adhoc task 34567asdasdfdasfdaf",
              "assignedTo": "005x0000000DecJ"
            },
            {
              "subject": "BA Adhoc Task 2345wewrw",
              "dueDate": "2022-12-08T00:00:00.000Z",
              "status": "In Progress",
              "priority": "High",
              "comment": "Second Adhoc task 5678",
              "assignedTo": "005x0000000DecJ"
            },
            {
              "subject": "BA Adhoc Task 3456713eqasdasfddf",
              "dueDate": "2022-11-08T00:00:00.000Z",
              "status": "Not Started",
              "priority": "Medium",
              "comment": "Third Adhoc task 123456",
              "assignedTo": "005x0000000DecJ"
            },
            {
              "subject": "BA Adhoc Task 44567wqewqewqr",
              "dueDate": "2022-08-10T00:00:00.000Z",
              "status": "Not Started",
              "priority": "High",
              "comment": "Fourth Adhoc task 34567",
              "assignedTo": "005x0000000DecJ"
            }
          ]
        }
      }
    }
  ]
},
"benefitAssignments": {
  "records": [
    {
      "enrollmentCount": 5,
      "entitlementAmount": 100,
      "participantId": "001x0000008mGwlAAE",
      "benefitId": "0jix000000000LgAAI",
      "associatedGoalAssignment": {
        "goalDefinitionId": "1gdx000000000ItAAI",
```

```
    "startDate": "2022-07-05T00:00:00.000Z",
    "targetCompletionDate": "2022-07-09T00:00:00.000Z",
    "completionPercentage": "83",
    "status": "Active",
    "goalAssigneeId": "001x0000008mGwlAAE",
    "priority": "High",
    "goalAssignmentTasks": {
      "adhocTasks": {
        "records": [
          {
            "subject": " GA Adhoc Task 14567dawasfdasf",
            "dueDate": "2022-09-08T00:00:00.000Z",
            "status": "Not Started",
            "priority": "Low",
            "comment": "First GA Adhoc task 34567asdasdfdasfdaf",
            "assignedTo": "005x0000000DecJ"
          },
          {
            "subject": "BA Adhoc Task 2345wewrw",
            "dueDate": "2022-12-08T00:00:00.000Z",
            "status": "In Progress",
            "priority": "High",
            "comment": "Second Adhoc task 5678",
            "assignedTo": "005x0000000DecJ"
          },
          {
            "subject": "BA Adhoc Task 3456713eqasdasfddf",
            "dueDate": "2022-11-08T00:00:00.000Z",
            "status": "Not Started",
            "priority": "Medium",
            "comment": "Third Adhoc task 123456",
            "assignedTo": "005x0000000DecJ"
          },
          {
            "subject": "BA Adhoc Task 44567wqewqewqr",
            "dueDate": "2022-08-10T00:00:00.000Z",
            "status": "Not Started",
            "priority": "High",
            "comment": "Fourth Adhoc task 34567",
            "assignedTo": "005x0000000DecJ"
          }
        ]
      }
    },
    "customFields": {
      "records": [
        {
          "fieldName": "BirthDate__c",
          "fieldValue": "1998-01-01"
        },
        {
          "fieldName": "RequestedAmount__c",
          "fieldValue": 5
        }
```

```
        ]
      }
    },
    "customFields": {
      "records": [
        {
          "fieldName": "cust_date__c",
          "fieldValue": "1998-01-01"
        },
        {
          "fieldName": "cust_amount__c",
          "fieldValue": 5
        }
      ]
    },
    "benefitAssignmentTasks": {
      "adhocTasks": {
        "records": [
          {
            "subject": " BA Adhoc Task Rec1",
            "dueDate": "2022-09-08T00:00:00.000Z",
            "status": "Not Started",
            "priority": "Low",
            "comment": "First BA Adhoc task Rec 1234",
            "assignedTo": "005x0000000DecJ"
          },
          {
            "subject": "BA Adhoc Task Rec 232143",
            "dueDate": "2022-12-08T00:00:00.000Z",
            "status": "In Progress",
            "priority": "High",
            "comment": "Second Adhoc task Rec 121324325",
            "assignedTo": "005x0000000DecJ"
          },
          {
            "subject": "BA Adhoc Task Rec 21325346457",
            "dueDate": "2022-11-08T00:00:00.000Z",
            "status": "Not Started",
            "priority": "Medium",
            "comment": "Third Adhoc task Rec 2324234235",
            "assignedTo": "005x0000000DecJ"
          },
          {
            "subject": "BA Adhoc Task Rec 1342432423",
            "dueDate": "2022-08-10T00:00:00.000Z",
            "status": "Not Started",
            "priority": "High",
            "comment": "Fourth Adhoc task Rec 2343242345",
            "assignedTo": "005x0000000DecJ"
          }
        ]
      }
    }
  }
```

```
    ]
  },
  "customFields": {
    "records": [
      {
        "fieldName": "tests1234__c",
        "fieldValue": "demo text"
      }
    ]
  },
  "medicationTherapyReview": "",
  "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": "005x0000000DecJ"
        },
        {
          "subject": "Adhoc Task 290889999",
          "dueDate": "2022-08-31T00:00:00.000Z",
          "status": "Not Started",
          "priority": "High",
          "comment": "Second Adhoc task 29083424324",
          "assignedTo": "005x0000000DecJ"
        },
        {
          "subject": "Adhoc Task 390821324324",
          "dueDate": "2022-08-08T00:00:00.000Z",
          "status": "Not Started",
          "priority": "Low",
          "comment": "Third Adhoc task 39082343243245",
          "assignedTo": "005x0000000DecJ"
        }
      ]
    }
  }
}
```


Response body for POST

Generic Output

Care Plan Definitions (GET)

Retrieve details about a specified definition record that is related to goal definition and the benefits of a care plan.

Resource

```
/connect/careplan/definitions/${definitionId}
```

Resource example

Note: You can either specify the benefit ID or goal definition ID.

```
https://yourInstance.salesforce.com/services/data/v63.0/
connect/careplan/definitions/0jiRM00000000JwYAI
```

Available version

56.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Care Plan Definition Output

Care Plan Templates (GET)

Retrieve the care plan template details. Fetches the care plan template benefits and care plan template goals associated with the given care plan template.

Resource

```
/connect/careplan/careplan-templates/${carePlanTemplateId}
```

Resource example

```
https://yourInstance.salesforce.com/services/data/63.0
/connect/careplan/careplan-templates/1stRM000000000pYAA
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Care Plan Template

Care Plan Templates (POST)

Create care plan template records. Associate the benefits and goals with the care plan template.

Resource

```
/connect/careplan/careplan-templates/${carePlanTemplateId}/actions/${actionType}
```

Resource example

```
https://yourInstance.salesforce.com/services/data/vXX.X
/connect/careplan/careplan-templates/${carePlanTemplateId}/actions/${actionType}
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

`<CarePlanTemplateAssociationsInput>`

JSON example

```
{
  "carePlanTemplateGoals": {
    "records": [
      {
        "goalDefinitionId": "1gdRN0000000006YAA",
        "priority": "High"
      },
      {
        "goalDefinitionId": "1gdRN0000000001YAA",
        "priority": "Medium"
      },
      {
        "goalDefinitionId": "1gdRN000000000GYAQ",
        "priority": "Low"
      }
    ]
  },
  "carePlanTemplateBenefits": {
    "records": [
      {
        "benefitId": "0jiRN000000000kYAA",
        "priority": "High"
      },
      {
        "benefitId": "0jiRN000000000fYAA",
        "priority": "Low"
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`carePlanTemplateBenefits`	Care Plan Template Benefit Input[]	Represents a junction between a care plan template and a benefit. This object stores the benefit details of a care plan template.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
carePlanTemplateGoals	Care Plan Template Goal Input[]	Represents a junction between a care plan template and a goal definition. This object stores the goal details of a care plan template.	Optional	55.0

Response body for POST

Generic Output

Benefit Disbursements (POST)

Create benefit disbursements for a benefit session to disburse benefits to participants enrolled in the benefit session.

Resource

```
/connect/benefit-assignment/${benefitAssignmentId}/benefit-disbursements
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/benefit-assignment/0nDxx0000000001FAA/benefit-disbursements
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "benefitDisbursements": {
    "records": [
      {
        "actualCompletionDate": "02-12-2024",
        "benefitCategory": "Monetary",
        "benefitSessionId": "0nDDD0000000EVj2AM",
        "description": "This is a monetary benefit to be disbursed",
        "disbursementStatus": "Completed",
        "endDate": "15-03-2023",
        "startDate": "01-01-2022"
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
benefitDisbursements	Benefit Disbursement for Benefit Session Input[]	Details of benefit disbursements to be created for a benefit session.	Required	58.0

Response body for POST

Generic Output

Benefit Sessions of a Care Plan (GET)

Get the details of benefit sessions enrolled by participants in a care plan.

Resource

```
/connect/careplan/benefit-session/${carePlanId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/careplan/benefit-session/1spxx0000000001AAA
```

Available version

58.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Care Plan Benefit Session Output

Request Bodies

Here's a list of Public Sector Solutions API request bodies.

Action Plan Template Items Input

Input representation for an Action Plan record.

Action Plan Template Item Task Input

Input representation for the task assigned to an action plan template item.

Action Plan Item Tasks Input

Input representation of the tasks assigned to an action plan item.

Benefit Assignment Input

Input representation of the assignment of a benefit.

Benefit Disbursements for Benefit Session Input

Input representation of the request to create benefit disbursements for a benefit session.

Benefit Disbursement for Benefit Session Input

Input representation of a benefit disbursement.

Care Plan Input

Input representation of the care plan request.

Care Plan Task Input

Input representation for the task assigned to the care plan.

Care Plan Tasks Input

Input representation of the care plan tasks.

Care Plan Template Associations Input

Input representation of the association of the care plan template benefit and care plan template goal records with the care plan template.

Care Plan Template Benefit Input

Input representation of the care plan template benefit.

Care Plan Template Goal Input

Input representation of the care plan template goal.

Custom Field Input

Input representation for the custom field.

Excluded Care Plan Task Input

Input representation for the excluded care plan tasks.

Goal Assignment Input

Input representation of the assignment of a goal.

Problem Definition Input

Input representation for the problem definition.

Action Plan Template Items Input

Input representation for an Action Plan record.

JSON example

```
{
   "targetId":"07rS60000004CAUIA2",
   "name":"Goal Assignment Action Demo",
   "excludedItems":{
      "records":[
         "0PJS60000004CA1OAM"
      ]
   },
   "updateableItems":{
      "tasks":{
         "records":[
            {
               "id":"BSHS60000004CA1OQA",
               "subject":"Onboarding Mandatory Training",
```

```
                "dueDate":"30-01-2022",
                "status":"Completed",
                "priority":"High",
                "comment":"Mandatory trainings for the new hires",
                "assignedTo":"0YwS60000004IByKAM"
            }
        ]
    }
},
"adhocItems":{
    "tasks":{
        "records":[
            {
                "subject":"Salesforce Platform Basics Training",
                "dueDate":"20-02-2023",
                "status":"In Progress",
                "priority":"Normal",
                "comment":"Learn the Salesforce Platform basics",
                "assignedTo":"0BsS60000004IByRAM",
                "isRequired":"False"
            }
        ]
    }
}
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`adhocItems`	Action Plan Item Tasks Input	Details of the action plan items to be created. Note: Applicable only when the `shouldAllowOverride` is set to true.	Optional	57.0
`excludedItems`	String[]	IDs of the action plan items to be removed. Note: Applicable only when the `shouldAllowOverride` is set to true.	Optional	57.0
`name`	String	Name of the action plan.	Required	57.0
`targetId`	String	Target ID of the action plan.	Required	57.0
`updateableItems`	Action Plan Item Tasks Input	Action plan items to be updated. Note: Applicable only when the `shouldAllowOverride` is set to true.	Optional	57.0

Action Plan Template Item Task Input

Input representation for the task assigned to an action plan template item.

Properties

Name	Type	Description	Required or Optional	Available Version
`assignedTo`	String	ID of the user to whom you want to assign the task.	Optional	57.0
`comment`	String	Comments on the task.	Optional	57.0
`dueDate`	String	Due date of the task.	Optional	57.0
`id`	String	ID of the task record.	Optional	57.0
`isRequired`	Boolean	Indicates whether the task is required (`true`) or not (`false`).	Optional	57.0
`priority`	String	Priority of the task. Possible values are: • `High` • `Low` • `Normal`	Required	57.0
`status`	String	Status of the task. Possible values are: • `Completed` • `Deferred` • `In Progress` • `Not Started` • `Waiting on someone else`	Optional	57.0
`subject`	String	The subject line of the task.	Required	57.0

Action Plan Item Tasks Input

Input representation of the tasks assigned to an action plan item.

Properties

Name	Type	Description	Required or Optional	Available Version
`tasks`	Action Plan Template Item Task Input	Details of the tasks to be assigned to an action plan item.	Optional	57.0

Benefit Assignment Input

Input representation of the assignment of a benefit.

Root XML tag

```
<BenefitAssignment>
```

Properties

Name	Type	Description	Required or Optional	Available Version
benefitDisbursements	Benefit Disbursement for Benefit Session Input[]	Details of benefit disbursements to be created for a benefit assignment in a benefit session.	Optional	58.0
benefitFrequency	String	Frequency at which the benefit is applied.	Optional	55.0
benefitId	String	ID of the benefit record associated with the assignment.	Required	55.0
customFields	Custom Field Input[]	The custom fields details of the goal assignment plan.	Optional	56.0
endDate	String	End date up to when the assignment is valid.	Optional	55.0
enrollmentCount	Integer	Number of times the benefit is applicable to an individual.	Optional	55.0
entitlementAmount	Double	Amount a participant is entitled to from the assignment.	Optional	55.0
id	String	ID of the benefit assignment record.	Optional	55.0
maximumAmount	Double	Maximum amount that can be disbursed during an assignment period.	Optional	55.0
participantId	String	ID of the account associated with the assignment.	Optional	55.0
priority	String	Priority of the benefit assignment record.	Optional	55.0
startDate	String	Start date from when the assignment begins.	Optional	55.0
status	String	Status of the benefit assignment,	Optional	56.0

Benefit Disbursements for Benefit Session Input

Input representation of the request to create benefit disbursements for a benefit session.

JSON example

```
{
  "benefitDisbursements": {
```

```
    "records": [
      {
        "actualCompletionDate": "02-12-2024",
        "benefitCategory": "Monetary",
        "benefitSessionId": "0nDDD0000000EVj2AM",
        "description": "This is a monetary benefit to be disbursed",
        "disbursementStatus": "Completed",
        "endDate": "15-03-2023",
        "startDate": "01-01-2022"
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
benefitDisbursements	Benefit Disbursement for Benefit Session Input[]	Details of benefit disbursements to be created for a benefit session.	Required	58.0

Benefit Disbursement for Benefit Session Input

Input representation of a benefit disbursement.

JSON example

```
    "records": [
      {
        "actualCompletionDate": "02-12-2024",
        "benefitCategory": "Monetary",
        "benefitSessionId": "0nDDD0000000EVj2AM",
        "description": "This is a monetary benefit to be disbursed",
        "disbursementStatus": "Completed",
        "endDate": "15-03-2023",
        "startDate": "01-01-2022"
      }
    ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
actualCompletionDate	String	Date the benefit was disbursed.	Required	58.0
benefitCategory	String	Category of the benefit.	Optional	58.0
benefitSessionId	String	ID of the benefit session record associated with the benefit disbursement.	Required	58.0

Name	Type	Description	Required or Optional	Available Version
`description`	String	Description for the benefit disbursement.	Optional	58.0
`disbursementStatus`	String	Disbursement status of the benefit. Possible values are: • `Absent` • `Completed` • `Enrolled` • `Excused`	Optional	58.0
`endDate`	String	Date the disbursement of the benefit ends.	Optional	58.0
`startDate`	String	Date the disbursement of the benefit starts.	Optional	58.0

Care Plan Input

Input representation of the care plan request.

Root XML tag

```
<CarePlan>
```

Properties

Name	Type	Description	Required or Optional	Available Version
`benefitAssignments`	Benefit Assignment Input[]	Details of the benefit assignment information of the care plan.	Optional	55.0
`carePlanTasks`	Care Plan Tasks Input	Task details of a care plan.	Optional	56.0
`carePlanTemplateId`	String	ID of the service plan template associated with the care plan.	Optional	55.0
`caseId`	String	Case associated with the care plan.	Required	55.0
`customFields`	Custom Field Input[]	Custom fields details of a care plan.	Optional	56.0
`description`	String	Description of the care plan record.	Optional	55.0
`endDate`	String	Date until when the care plan is effective.	Optional	55.0
`goalAssignments`	Goal Assignment Input[]	Represents the goal assignment information of the care plan.	Optional	55.0
`id`	String	ID of the care plan record.	Optional	55.0
`name`	String	Name of the care plan record.	Required	55.0
`participantId`	String	ID of the account associated with the care plan.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
problems	Problem Definition Input[]	Details of the problems associated with the care plan.	Required	57.0
startDate	String	Date from when the care plan is effective.	Optional	55.0
status	String	Status of the care plan.	Required	55.0

Care Plan Task Input

Input representation for the task assigned to the care plan.

Root XML tag

```
<CarePlanTask>
```

Properties

Name	Type	Description	Required or Optional	Available Version
assignedTo	String	ID of the user to whom the task is assigned.	Optional	56.0
comment	String	Comments made on the care plan task.	Optional	56.0
dueDate	String	Due date of the task assigned to the care plan.	Optional	56.0
id	String	ID of the task record assigned to the care plan.	Optional	56.0
isRequired	Boolean	Indicates whether the task field is required (true) or not (false).	Required	57.0
priority	String	Priority 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. The status comes from the Status field of the Task object.	Optional	56.0
subject	String	Subject of the care plan task.	Optional	56.0
taskDefinitionId	String	ID of the task definition assigned to the care plan.	Optional	57.0
taskId	String	Task record ID associated with the care plan.	Optional	57.0

Care Plan Tasks Input

Input representation of the care plan tasks.

Root XML tag

```
<CarePlanTasks>
```

Properties

Name	Type	Description	Required or Optional	Available Version
adhocTasks	Care Plan Task Input[]	List of adhoc tasks for a care plan.	Optional	56.0
excludedTasks	Excluded Care Plan Task Input	List of tasks to be excluded for a care plan.	Optional	56.0
tasks	Care Plan Task Input[]	List of tasks assigned to a care plan.	Optional	56.0

Care Plan Template Associations Input

Input representation of the association of the care plan template benefit and care plan template goal records with the care plan template.

Root XML tag

```
<CarePlanTemplateAssociationsInput>
```

JSON example

```
{
  "carePlanTemplateGoals": {
    "records": [
      {
        "goalDefinitionId": "1gdRN0000000006YAA",
        "priority": "High"
      },
      {
        "goalDefinitionId": "1gdRN0000000001YAA",
        "priority": "Medium"
      },
      {
        "goalDefinitionId": "1gdRN000000000GYAQ",
        "priority": "Low"
      }
    ]
  },
  "carePlanTemplateBenefits": {
    "records": [
      {
        "benefitId": "0jiRN000000000kYAA",
        "priority": "High"
      },
      {
        "benefitId": "0jiRN000000000fYAA",
        "priority": "Low"
      }
    ]
```

```
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
carePlanTemplateBenefits	Care Plan Template Benefit Input[]	Represents a junction between a care plan template and a benefit. This object stores the benefit details of a care plan template.	Optional	55.0
carePlanTemplateGoals	Care Plan Template Goal Input[]	Represents a junction between a care plan template and a goal definition. This object stores the goal details of a care plan template.	Optional	55.0

Care Plan Template Benefit Input

Input representation of the care plan template benefit.

Root XML tag

```
<CarePlanTemplateBenefitInput>
```

Properties

Name	Type	Description	Required or Optional	Available Version
benefitId	String	Benefit ID associated with the care plan template benefit record.	Optional	55.0
priority	String	Priority of the care plan template benefit.	Optional	55.0

Care Plan Template Goal Input

Input representation of the care plan template goal.

Root XML tag

```
<CarePlanTemplateGoalInput>
```

Properties

Name	Type	Description	Required or Optional	Available Version
goalDefinitionId	String	Goal definition ID associated with the care plan template goal.	Optional	55.0
priority	String	Priority of the care plan template goal.	Optional	55.0

Custom Field Input

Input representation for the custom field.

Root XML tag

```
<CustomField>
```

Properties

Name	Type	Description	Required or Optional	Available Version
`dataType`	String	The data type of the custom field. Possible values are: • `Boolean` • `DateOnly` • `DateTime` • `MultiEnum` • `Number` • `String` • `TimeOnly`	Optional	56.0
`fieldName`	String	The name of the custom field.	Optional	56.0
`fieldValue`	Object	The value of the custom field.	Optional	56.0

Excluded Care Plan Task Input

Input representation for the excluded care plan tasks.

Root XML tag

```
<ExcludedCarePlanTasks>
```

Properties

Name	Type	Description	Required or Optional	Available Version
`tasks`	String[]	Tasks to be excluded from the care plan.	Optional	56.0

Goal Assignment Input

Input representation of the assignment of a goal.

Root XML tag

```
<GoalAssignment>
```

Properties

Name	Type	Description	Required or Optional	Available Version
associatedBenefitAssignments	Benefit Assignment Input[]	Associated sub benefit assignments.	Required	57.0
associatedSubGoalAssignments	Goal Assignment Input[]	Associated sub goal assignments.	Required	57.0
completionDate	String	Completion date of the assignment of a goal.	Optional	56.0
completionPercentage	Double	Indicates the progress made on the assigned goal in percentage.	Optional	55.0
customFields	Custom Field Input[]	Custom field details of the goal assignment plan.	Optional	56.0
description	String	Description of a goal assignment.	Optional	56.0
goalAssigneeId	String	ID of the assignee associated with the goal assignment.	Optional	55.0
goalAssignmentTasks	Care Plan Tasks Input	Task details for a goal assignment.	Optional	56.0
goalDefinitionId	String	ID of the goal definition associated with the goal assignment.	Required	55.0
id	String	ID of the goal assignment record.	Required	55.0
priority	String	Priority of the assigned goal.	Optional	55.0
startDate	String	Start date of the assigned goal.	Optional	55.0
status	String	Status of the assigned goal.	Optional	55.0
targetCompletionDate	String	Date when the assigned goal is expected to be completed.	Optional	55.0

Problem Definition Input

Input representation for the problem definition.

Properties

Name	Type	Description	Required or Optional	Available Version
associatedGoalAssignments	Goal Assignment Input[]	Associated goal assignments for the problem.	Required	57.0
category	String	Category of the problem.	Required	57.0

Name	Type	Description	Required or Optional	Available Version
codeId	String	Code ID of the problem.	Required	57.0
description	String	Description of the problem.	Required	57.0
id	String	ID of the problem.	Required	57.0
priority	String	Priority of the problem.	Required	57.0
problemDefinitionId	String	Problem definition ID of the problem.	Required	57.0
problemTasks	Care Plan Tasks Input	Details of the care plan tasks for the problem.	Required	57.0
sequenceNumber	Integer	Sequence number of the problem.	Required	57.0
title	String	Title of the problem.	Required	57.0
usageType	String	Usage type of the problem.	Required	57.0

Response Bodies

Here's a list of Public Sector Solutions API response bodies.

Action Plan Output
Output representation of an Action Plan record.

Action Plan Template
Output representation for the action plan template record.

Action Plan Template Items
Output representation for the list of the action plan template items.

Action Plan Template Item
Output representation of an item on an action plan template version.

Action Plan Template List
Output representation for the list of action plan templates.

Benefit Assignment List
Output representation of the benefit assignments.

Benefit Assignment
Output representation of the benefit assignment details.

Benefit List
Output representation of the benefit records.

Benefit Output
Output representation of the benefit assignment details.

Care Plan Output
Output representation of the care plan and the associated benefit assignment and goal assignment records.

Care Plan Benefit Session Output

Output representation of benefits and their associated benefit sessions in a care plan.

Care Plan Benefit Session Info List

Output representation of benefit sessions associated with a benefit in a care plan.

Care Plan Benefit Session Info

Output representation of the details of a benefit and its enrolled benefit sessions in a care plan.

Care Plan Session Enrollee Info List

Output representation of the details of benefit session enrollees.

Care Plan Session Enrollee Info

Output representation of the details of a benefit session enrollee.

Care Plan Definition Output

Output representation of the care plan definition record and its related goal definition and benefits.

Care Plan Generic Output

Output representation of the created care plan record or care plan template record.

Care Plan Task

Output representation for a care plan task.

Care Plan Tasks

Output representation for the care plan tasks.

Care Plan Task List

Output representation for the list of care plan tasks.

Care Plan Template

Input representation of the care plan template benefit and care plan template goal records associated with the care plan template.

Care Plan Template Benefit

Output representation of the care plan template benefit.

Care Plan Template Benefit List

Output representation of the care plan template benefits.

Care Plan Template Goal

Output representation of the care plan template goal.

Care Plan Template Goal List

Output representation of the care plan template goals.

Custom Field

Output representation of the custom fields.

Custom Field List

Output representation of the list of the custom fields.

Goal Assignment List

Output representation of the goal assignments.

Goal Assignment

Output representation of the goal assignment details.

Goal Definition List

Output representation of the goal definition records.

Goal Definition Output
Output representation of the goal definition.

Problem Definition Output
Output representation of the problem definition.

Action Plan Output

Output representation of an Action Plan record.

JSON example

```
{
   "statusCode":"200",
   "actionPlanId":"1stTP000000000aYAA",
   "message":"Action plan created successfully",
   "isSuccess":true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`actionPlanId`	String	ID of the created action plan.	Small, 57.0	57.0
`isSuccess`	Boolean	Indicates whether the create request is successful (`true`) or not (`false`).	Small, 57.0	57.0
`message`	String	Message of the request that provides information about the request execution status.	Small, 57.0	57.0
`statusCode`	String	Status code of the create request.	Small, 57.0	57.0

Action Plan Template

Output representation for the action plan template record.

Property Name	Type	Description	Filter Group and Version	Available Version
`actionPlanTemplateItems`	Action Plan Template Items	List of the action plan template items.	Small, 56.0	56.0
`id`	String	ID of the action plan template record.	Small, 56.0	56.0
`name`	String	Name of this action plan template version.	Small, 56.0	56.0
`status`	String	Status of the action plan template version. Possible values are: • `Draft` • `Obsolete` • `Published`	Small, 56.0	56.0

Action Plan Template Items

Output representation for the list of the action plan template items.

Property Name	Type	Description	Filter Group and Version	Available Version
`records`	Action Plan Template Item[]	An item on an action plan template version.	Small, 56.0	56.0

Action Plan Template Item

Output representation of an item on an action plan template version.

Property Name	Type	Description	Filter Group and Version	Available Version
`actionPlanTemplateVersion`	String	Version of the action plan template item.	Small, 56.0	56.0
`displayOrder`	Integer	Order in which this item is displayed within the action plan template version.	Small, 56.0	56.0
`id`	String	Unique identifier for this action plan template item record.	Small, 56.0	56.0
`isRequired`	Boolean	Indicates whether the task created from this template item is required (`true`) or not (`false`).	Small, 56.0	56.0
`itemEntityType`	String	Type of action plan template item entity. Always set to Task. Possible values are: • `AssessmentTask` • `RecordAction` • `SignatureTask` • `Task`	Small, 56.0	56.0
`name`	String	Name of the action plan template item record.	Small, 56.0	56.0

Action Plan Template List

Output representation for the list of action plan templates.

Property Name	Type	Description	Filter Group and Version	Available Version
`records`	Action Plan Template[]	List of the associated action plan templates.	Small, 56.0	56.0

Benefit Assignment List

Output representation of the benefit assignments.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Benefit Assignment[]	List of the assigned benefits.	Small, 55.0	55.0

Benefit Assignment

Output representation of the benefit assignment details.

Property Name	Type	Description	Filter Group and Version	Available Version
benefitFrequency	String	Frequency at which the benefit is applied.	Small, 55.0	55.0
benefitId	String	ID of the benefit record associated with the assignment.	Small, 55.0	55.0
benefitName	String	Name of the benefit record associated with the assignment.	Small, 55.0	55.0
endDate	String	End date up to when the benefit assignment is valid.	Small, 55.0	55.0
enrollmentCount	Integer	Number of times the benefit is applicable to an individual.	Small, 55.0	55.0
entitlementAmount	Double	Amount a participant is entitled to from the benefit assignment.	Small, 55.0	55.0
id	String	ID of the benefit assignment record.	Small, 55.0	55.0
maximumAmount	Double	Maximum amount that can be disbursed during an assignment period.	Small, 55.0	55.0
participantId	String	ID of the account associated with the assignment.	Small, 55.0	55.0
priority	String	Priority of the benefit assignment record.	Small, 55.0	55.0
startDate	String	Start date from when the assignment begins.	Small, 55.0	55.0

Benefit List

Output representation of the benefit records.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Benefit Output[]	Details of the benefit records.	Small, 57.0	57.0

Benefit Output

Output representation of the benefit assignment details.

Property Name	Type	Description	Filter Group and Version	Available Version
associatedActionPlanTemplates	Action Plan Template List	Action plan templates associated with the benefit.	Small, 56.0	56.0
benefitFrequency	String	Frequency at which the benefit is applied.	Small, 55.0	55.0
description	String	Description of the benefit.	Small, 56.0	56.0
enrollmentCount	Integer	Number of times the benefit is applicable to an individual.	Small, 55.0	55.0
id	String	ID of the benefit record.	Small, 55.0	55.0
isActive	Boolean	Indicates whether the benefit record is active (true) or not (false).	Small, 55.0	55.0
maximumAmount	Double	Maximum amount that can be disbursed during an assignment period.	Small, 55.0	55.0
name	String	Name of the benefit record.	Small, 55.0	55.0
programId	String	ID of the program associated with the benefit.	Small, 57.0	57.0
status	String	Status of the benefit record.	Small, 55.0	55.0

Care Plan Output

Output representation of the care plan and the associated benefit assignment and goal assignment records.

JSON example

```
{
  "benefitAssignments": {
    "records": [
      {
        "benefitAssignmentTasks": {
          "tasks": {
            "records": [
              {
                "dueDate": "2022-09-20",
                "id": "00TRM00000Jxna72AB",
                "priority": "Low",
                "relatedTo": "0nDRM0000004CGJ2A2",
                "status": "Not Started",
                "subject": "Benefit Task 1"
              },
              {
                "id": "00TRM00000K3a3c2AB",
                "priority": "Normal",
```

```
                "relatedTo": "0nDRM0000004CGJ2A2",
                "status": "In Progress",
                "subject": "test task 0"
              }
            ]
          }
        },
        "benefitId": "0jiRM00000000KGYAY",
        "benefitName": "Test Benefit 1",
        "customFields": {
          "records": [
            {
              "dataType": "Boolean",
              "fieldName": "CustomCheckbox__c",
              "fieldValue": false
            }
          ]
        },
        "id": "0nDRM0000004CGJ2A2",
        "participantId": "001RM000005LXQcYAO",
        "priority": "Low"
      }
    ]
  },
  "carePlanTasks": {
    "tasks": {
      "records": [
        {
          "dueDate": "2022-09-10",
          "id": "00TRM00000Jxna62AB",
          "priority": "Low",
          "relatedTo": "1spRM0000004CDZYA2",
          "status": "Not Started",
          "subject": "Test CPT task"
        }
      ]
    }
  },
  "carePlanTemplateId": "1stRM000000001nYAA",
  "carePlanTemplateName": "Test CPT_2",
  "caseId": "500RM000003nux7YAA",
  "customFields": {
    "records": [
      {
        "dataType": "Boolean",
        "fieldName": "CustomCheckBox__c",
        "fieldValue": false
      },
      {
        "dataType": "Boolean",
        "fieldName": "CustomCheckbox3__c",
        "fieldValue": false
      },
      {
```

```
        "dataType": "Boolean",
        "fieldName": "isChecked__c",
        "fieldValue": false
      },
      {
        "dataType": "Double",
        "fieldName": "testNum__c",
        "fieldValue": 433
      }
    ]
  },
  "goalAssignments": {
    "records": [
      {
        "completionPercentage": 0,
        "customFields": {
          "records": [
            {
              "dataType": "Boolean",
              "fieldName": "CustomCheckbox2__c",
              "fieldValue": false
            }
          ]
        },
        "goalAssignmentTasks": {
          "tasks": {
            "records": [
              {
                "dueDate": "2022-10-01",
                "id": "00TRM00000Jxna32AB",
                "priority": "Low",
                "relatedTo": "1pgRM0000004CCCYA2",
                "status": "Not Started",
                "subject": "Goal Task 1"
              }
            ]
          }
        },
        "goalDefinitionId": "1gdRM0000004CBTYA2",
        "goalDefinitionName": "Test Stra Goal 1",
        "goalType": "Strategic",
        "id": "1pgRM0000004CCCYA2",
        "status": "Active"
      },
      {
        "completionPercentage": 0,
        "customFields": {
          "records": [
            {
              "dataType": "Boolean",
              "fieldName": "CustomCheckbox2__c",
              "fieldValue": false
            }
          ]
```

```
        },
        "goalAssigneeId": "001RM000005MZefYAG",
        "goalAssignmentTasks": {
          "tasks": {
            "records": [
              {
                "dueDate": "2022-10-01",
                "id": "00TRM00000Jxna52AB",
                "priority": "Low",
                "relatedTo": "1pgRM0000004CCDYA2",
                "status": "Not Started",
                "subject": "Goal Task 1"
              }
            ]
          }
        },
        "goalDefinitionId": "1gdRM000000001OYAQ",
        "goalDefinitionName": "Test Ind Goal 1",
        "goalType": "Individual",
        "id": "1pgRM0000004CCDYA2",
        "priority": "Low",
        "status": "Active"
      }
    ]
  },
  "id": "1spRM0000004CDZYA2",
  "name": "test CP",
  "participantId": "001RM000005LXQcYAO",
  "status": "Started",
  "taskJobStatus": "Completed"
}
```


Property Name	Type	Description	Filter Group and Version	Available Version
benefitAssignments	Benefit Assignment List	List of benefit assignments associated with the care plan record.	Small, 55.0	55.0
carePlanTasks	Care Plan Tasks	Tasks for a care plan.	Small, 56.0	56.0
carePlanTemplateId	String	ID of the service plan template associated with the care plan.	Small, 55.0	55.0
carePlanTemplateName	String	Name of the service plan template associated with the care plan.	Small, 55.0	55.0
caseId	String	Case associated with the care plan record.	Small, 55.0	55.0
customFields	Custom Field List	Custom fields details of the care plan.	Small, 56.0	56.0
description	String	Description of the care plan record.	Small, 55.0	55.0
endDate	String	Date until when the care plan is effective.	Small, 55.0	55.0
goalAssignments	Goal Assignment List	List of goal assignments associated with this care plan record.	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the care plan record.	Small, 55.0	55.0
name	String	Name of the care plan record.	Small, 55.0	55.0
participantId	String	ID of the account associated with the care plan.	Small, 55.0	55.0
startDate	String	Date from when the care plan is effective.	Small, 55.0	55.0
status	String	Status of the care plan.	Small, 55.0	55.0
taskJobAggregatedStatus	String	The aggregated status of the tasks associated with the care plan record.	Small, 57.0	58.0
taskJobStatus	String	Reserved for internal use.	Small, 56.0	56.0
taskJobStatusReason	String	Reserved for internal use.	Small, 56.0	56.0

Care Plan Benefit Session Output

Output representation of benefits and their associated benefit sessions in a care plan.

JSON Example

```
{
   "carePlanId":"1spxx0000000001AAA",
   "benefitSessionInfo":{
      "records":[
         {
            "assignmentCount":2,
            "benefitId":"0jixx0000000001AAA",
            "benefitName":"LIHEAP Assistance",
            "sessionEnrolleeInfo":{
               "records":[
                  {
                     "benefitAssignmentId":"0nDxx0000000001EAA",
                     "benefitEndDate":"2023-06-30T19:00:00.000Z",
                     "enrolleeId":"001xx000003GYp9AAG",
                     "enrolleeName":"acc1",
                     "sessionsEnrolled":10
                  },
                  {
                     "benefitAssignmentId":"0nDxx000000003FEAQ",
                     "benefitEndDate":"2023-05-30T19:00:00.000Z",
                     "enrolleeId":"001xx000003GYp9AAG",
                     "enrolleeName":"acc1",
                     "sessionsEnrolled":1
                  }
               ]
            }
         },
```

```
            {
               "assignmentCount":2,
               "benefitId":"0jixx0000000001AAA",
               "benefitName":"Child Education",
               "sessionEnrolleeInfo":{
                  "records":[
                     {
                        "benefitAssignmentId":"0nDxx0000000001EAA",
                        "benefitEndDate":"2023-06-30T19:00:00.000Z",
                        "enrolleeId":"001xx000003GYp9AAG",
                        "enrolleeName":"acc2",
                        "sessionsEnrolled":1
                     },
                     {
                        "benefitAssignmentId":"0nDxx000000001dEAA",
                        "benefitEndDate":"2022-12-23T20:00:00.000Z",
                        "enrolleeId":"001xx000003GYp9AAG",
                        "enrolleeName":"acc2",
                        "sessionsEnrolled":2
                     }
                  ]
               }
            }
         ]
      }
}
```


Property Name	Type	Description	Filter Group and Version	Available Version
benefitSessionInfo	Care Plan Benefit Session Info List	List of benefits and their associated benefit sessions in a care plan.	Small, 58.0	58.0
carePlanId	String	ID of the care plan to get details of its associated benefit sessions.	Small, 58.0	58.0

Care Plan Benefit Session Info List

Output representation of benefit sessions associated with a benefit in a care plan.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Care Plan Benefit Session Info[]	Details of benefit sessions associated with a benefit in a care plan.	Small, 58.0	58.0

Care Plan Benefit Session Info

Output representation of the details of a benefit and its enrolled benefit sessions in a care plan.

Property Name	Type	Description	Filter Group and Version	Available Version
assignmentCount	Integer	Number of participants enrolled to the benefit.	Small, 58.0	58.0
benefitId	String	ID of the benefit record.	Small, 58.0	58.0
benefitName	String	Name of the benefit.	Small, 58.0	58.0
sessionEnrolleeInfo	Care Plan Session Enrollee Info List	List of participants enrolled to benefit sessions of the specified benefit.	Small, 58.0	58.0

Care Plan Session Enrollee Info List

Output representation of the details of benefit session enrollees.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Care Plan Session Enrollee Info[]	Details of benefit session enrollees.	Small, 58.0	58.0

Care Plan Session Enrollee Info

Output representation of the details of a benefit session enrollee.

Property Name	Type	Description	Filter Group and Version	Available Version
benefitAssignmentId	String	ID of the benefit assignment.	Small, 58.0	58.0
benefitEndDate	String	End date of the benefit enrolled.	Small, 58.0	58.0
benefitStartDate	String	Start date of the benefit enrolled.	Small, 58.0	58.0
enrolleeId	String	ID of the participant enrolled to the benefit.	Small, 58.0	58.0
enrolleeName	String	Name of the enrollee.	Small, 58.0	58.0
sessionsEnrolled	Integer	Number of benefit sessions enrolled by the enrollee.	Small, 58.0	58.0

Care Plan Definition Output

Output representation of the care plan definition record and its related goal definition and benefits.

JSON example

```
{
  "benefitDefinition": {
    "associatedActionPlanTemplates": {
      "records": [
```

```
    {
      "actionPlanTemplateItems": {
        "records": [
          {
            "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
            "id": "0PJRM00000001fV4AQ",
            "isRequired": false,
            "itemEntityType": "Task",
            "name": "benefit task 3"
          },
          {
            "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
            "id": "0PJRM0000004DpS4AU",
            "isRequired": false,
            "itemEntityType": "Task",
            "name": "benefit task 2"
          },
          {
            "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
            "id": "0PJRM00000001fU4AQ",
            "isRequired": false,
            "itemEntityType": "Task",
            "name": "benefit task 1"
          }
        ]
      },
      "id": "0PTRM0000004DIK4A2",
      "name": "Benefit Tasks",
      "status": "Final"
    },
    {
      "actionPlanTemplateItems": {
        "records": [
          {
            "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
            "id": "0PJRM00000001fV4AQ",
            "isRequired": false,
            "itemEntityType": "Task",
            "name": "benefit task 3"
          },
          {
            "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
            "id": "0PJRM0000004DpS4AU",
            "isRequired": false,
            "itemEntityType": "Task",
            "name": "benefit task 2"
          },
          {
            "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
            "id": "0PJRM00000001fU4AQ",
            "isRequired": false,
            "itemEntityType": "Task",
            "name": "benefit task 1"
          }
```

```
            ]
          },
          "id": "0PTRM0000004DIK4A2",
          "name": "Benefit Tasks",
          "status": "Final"
        },
        {
          "actionPlanTemplateItems": {
            "records": [
              {
                "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
                "id": "0PJRM00000001fV4AQ",
                "isRequired": false,
                "itemEntityType": "Task",
                "name": "benefit task 3"
              },
              {
                "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
                "id": "0PJRM0000004DpS4AU",
                "isRequired": false,
                "itemEntityType": "Task",
                "name": "benefit task 2"
              },
              {
                "actionPlanTemplateVersion": "0PTRM0000004DIK4A2",
                "id": "0PJRM00000001fU4AQ",
                "isRequired": false,
                "itemEntityType": "Task",
                "name": "benefit task 1"
              }
            ]
          },
          "id": "0PTRM0000004DIK4A2",
          "name": "Benefit Tasks",
          "status": "Final"
        }
      ]
    },
    "id": "0jiRM00000000JwYAI",
    "isActive": true,
    "name": "benefit 1"
  },
  "id": "0jiRM00000000JwYAI"
}
```


Property Name	Type	Description	Filter Group and Version	Available Version
benefitDefinition	Benefit Output	Benefit assignment details of the care plan template benefit. Note: When goal definition ID is specified in the API request, this property is unspecified.	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
goalDefinition	Goal Definition Output	Goal assignment details of the care plan template goal. Note: When benefit ID is specified in the API request, this property is unspecified.	Small, 56.0	56.0
id	String	ID of the definition record specified in the request.	Small, 56.0	56.0
problemDefinition	Problem Definition Output	Details of the problem definition records.	Small, 57.0	57.0

Care Plan Generic Output

Output representation of the created care plan record or care plan template record.

JSON example

```
{
  "code": "200",
  "id": "1stRN000000000aYAA",
  "isSuccess": true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Code of the create request.	Small, 55.0	55.0
id	String	ID of the record created after the request was successful.	Small, 55.0	55.0
isSuccess	Boolean	Indicates whether the create request was successful (true) or not (false).	Small, 55.0	55.0
message	String	Message of the request in case of failure.	Small, 55.0	55.0

Care Plan Task

Output representation for a care plan task.

Property Name	Type	Description	Filter Group and Version	Available Version
assignedTo	String	ID of the user who is assigned the task.	Small, 56.0	56.0
comment	String	Comments made on the care plan task.	Small, 56.0	56.0
dependentTasks	Care Plan Task List	Details of the dependent tasks.	Small, 57.0	57.0

Property Name	Type	Description	Filter Group and Version	Available Version
`displayOrder`	Integer	The order in which the dependent tasks are displayed.	Small, 57.0	57.0
`dueDate`	String	Due date of the task assigned to the care plan.	Small, 56.0	56.0
`id`	String	ID of the task record assigned to the care plan.	Small, 56.0	56.0
`isRequired`	Boolean	Indicates whether the task record is required (`true`) or not (`false`).	Small, 57.0	57.0
`priority`	String	Priority of the task assigned to the care plan.	Small, 56.0	56.0
`relatedTo`	String	Name of the user to whom the care plan is related.	Small, 56.0	56.0
`status`	String	Status of the task assigned to the care plan, such as In Progress or Completed. The status comes from the `Status` field of the Task object.	Small, 56.0	56.0
`subject`	String	Subject of the task assigned to the care plan.	Small, 56.0	56.0

Care Plan Tasks

Output representation for the care plan tasks.

Property Name	Type	Description	Filter Group and Version	Available Version
`tasks`	Care Plan Task List	List of the care plan tasks.	Small, 56.0	56.0

Care Plan Task List

Output representation for the list of care plan tasks.

Property Name	Type	Description	Filter Group and Version	Available Version
`records`	Care Plan Task[]	Details of a care plan task.	Small, 56.0	56.0

Care Plan Template

Input representation of the care plan template benefit and care plan template goal records associated with the care plan template.

JSON example


```
{
  "carePlanTemplateBenefits": {
    "records": [
      {
        "associatedBenefit": {
          "id": "0jiRN000000000pYAA",
          "isActive": true,
          "name": "Rehab benefit"
        },
        "id": "1tbRN000000000VYAQ",
        "priority": "Low"
      },
      {
        "associatedBenefit": {
          "id": "0jiRN000000000fYAA",
          "isActive": true,
          "maximumAmount": 5000,
          "name": "Meditation benefit"
        },
        "id": "1tbRN0000000019YAA",
        "priority": "Low"
      }
    ]
  },
  "carePlanTemplateGoals": {
    "records": [
      {
        "associatedGoalDefinition": {
          "id": "1gdRN0000000006YAA",
          "name": "Career goal",
          "status": "Active",
          "type": "Individual"
        },
        "id": "1tgRN000000001JYAQ",
        "priority": "Low"
      },
      {
        "associatedGoalDefinition": {
          "id": "1gdRN000000000GYAQ",
          "name": "Goal with benefit",
          "status": "Active",
          "type": "Strategic"
        },
        "id": "1tgRN0000000027YAA",
        "priority": "Low"
      }
    ]
  },
  "id": "1stRN0000000006YAA",
  "name": "CPT 2",
  "status": "Published"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
associatedActionPlanTemplates	Action Plan Template List	List of the associated action plan template records.	Small, 56.0	56.0
carePlanTemplateBenefits	Care Plan Template Benefit List	List the benefit details of a care plan template.	Small, 55.0	55.0
carePlanTemplateGoals	Care Plan Template Goal List	List the goal details of a care plan template.	Small, 55.0	55.0
id	String	ID of the care plan template record.	Small, 55.0	55.0
name	String	Name of the care plan template record.	Small, 55.0	55.0
status	String	Status of the care plan template record.	Small, 55.0	55.0

Care Plan Template Benefit

Output representation of the care plan template benefit.

Property Name	Type	Description	Filter Group and Version	Available Version
associatedBenefit	Benefit Output	Benefit assignment details of the care plan template benefit.	Small, 55.0	55.0
id	String	ID of the care plan template benefit record.	Small, 55.0	55.0
priority	String	Priority of the care plan template benefit record.	Small, 55.0	55.0

Care Plan Template Benefit List

Output representation of the care plan template benefits.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Care Plan Template Benefit[]	List of the care plan template benefit records.	Small, 55.0	55.0

Care Plan Template Goal

Output representation of the care plan template goal.

Property Name	Type	Description	Filter Group and Version	Available Version
associatedGoalDefinition	Goal Definition Output	Goal assignment details of the care plan template goal.	Small, 55.0	55.0
id	String	ID of the care plan template goal record.	Small, 55.0	55.0
priority	String	Priority of the care plan template goal record.	Small, 55.0	55.0

Care Plan Template Goal List

Output representation of the care plan template goals.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Care Plan Template Goal[]	List of the care plan template goal records.	Small, 55.0	55.0

Custom Field

Output representation of the custom fields.

Property Name	Type	Description	Filter Group and Version	Available Version
dataType	String	The data type of the custom field.	Small, 56.0	56.0
fieldName	String	The name of the custom field.	Small, 56.0	56.0
fieldValue	Object	The value of the custom field.	Small, 56.0	56.0

Custom Field List

Output representation of the list of the custom fields.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Custom Field[]	List of the custom fields.	Small, 56.0	56.0

Goal Assignment List

Output representation of the goal assignments.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Goal Assignment[]	List of the assigned goals.	Small, 55.0	55.0

Goal Assignment

Output representation of the goal assignment details.

Property Name	Type	Description	Filter Group and Version	Available Version
associatedBenefitAssignments	Benefit Assignment List	Associated benefit assignments for the goal assignment.	Small, 57.0	57.0
associatedSubGoalAssignments	Goal Assignment List	Associated sub goals for the goal assignment.	Small, 57.0	57.0
completionDate	String	Completion date of the assignment of a goal.	Small, 56.0	56.0
completionPercentage	Double	Indicates the progress made on the assigned goal in percentage.	Small, 55.0	55.0
customFields	Custom Field Input[]	Custom field details of the goal assignment plan.	Small, 56.0	56.0
description	String	Description of a goal assignment.	Small, 56.0	56.0
goalAssigneeId	String	ID of the assignee associated with the goal assignment.	Small, 55.0	55.0
goalAssignmentTasks	Care Plan Tasks Input	Task details for a goal assignment.	Small, 56.0	56.0
goalDefinitionId	String	ID of the goal definition associated with the goal assignment record.	Small, 55.0	55.0
goalDefinitionName	String	Name of the goal definition associated with the goal assignment record.	Small, 55.0	55.0
goalType	String	Type of goal associated with the goal assignment record. Valid values are: • Group • Individual	Small, 55.0	55.0
id	String	ID of the goal assignment record.	Small, 55.0	55.0
priority	String	Priority of the assigned goal.	Small, 55.0	55.0
startDate	String	Start date of the assigned goal.	Small, 55.0	55.0
status	String	Status of the assigned goal.	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
targetCompletionDate	String	Date when the assigned goal is expected to be completed.	Small, 55.0	55.0
taskJobStatus	String	Reserved for internal use.	Small, 56.0	56.0
taskJobStatusReason	String	Reserved for internal use.	Small, 56.0	56.0

Goal Definition List

Output representation of the goal definition records.

Property Name	Type	Description	Filter Group and Version	Available Version
records	Goal Definition Output[]	Details of the goal definition records.	Small, 57.0	57.0

Goal Definition Output

Output representation of the goal definition.

Property Name	Type	Description	Filter Group and Version	Available Version
associatedActionPlanTemplates	Action Plan Template List	Action plan templates associated with the goal definition.	Small, 56.0	56.0
associatedBenefits	Benefit List	List of the associated benefit records.	Small, 57.0	57.0
associatedSubGoals	Goal Definition List	List of the associated goal definition records.	Small, 57.0	57.0
category	String	Category of the goal definition.	Small, 56.0	56.0
description	String	Description of the goal definition.	Small, 56.0	56.0
id	String	ID of the goal definition record.	Small, 55.0	55.0
name	String	Name of the goal definition.	Small, 55.0	55.0
status	String	Status of the goal definition.	Small, 55.0	55.0
type	String	Type of the goal definition applied to a group or an individual.	Small, 55.0	55.0
usageType	String	Usage type of the goal definition.	Small, 56.0	56.0

Problem Definition Output

Output representation of the problem definition.

Property Name	Type	Description	Filter Group and Version	Available Version
`associatedActionPlanTemplates`	Action Plan Template List	Details of associated action plan template records.	Small, 57.0	57.0
`associatedGoalDefinitions`	Goal Definition List	Details of the associated goal definition records.	Small, 57.0	57.0
`category`	String	Category of the problem definition.	Small, 57.0	57.0
`codeId`	String	Code ID of the problem definition.	Small, 57.0	57.0
`description`	String	Description of the problem definition.	Small, 57.0	57.0
`id`	String	Record ID of the problem definition.	Small, 57.0	57.0
`isActive`	Boolean	Indicates whether the status of the problem definition is active (`true`) or not (`false`).	Small, 57.0	57.0
`name`	String	Name of the problem definition.	Small, 57.0	57.0
`priority`	String	Priority of the problem definition. Possible values are: • `High` • `Low`	Small, 57.0	57.0
`usageType`	String	Usage type of the problem definition.	Small, 57.0	57.0

CHAPTER 5 Public Sector Solutions Standard Invocable Actions

In this chapter ...

- Benefit Disbursement Action
- Run Record Aggregation Batch Processing Definition Action

Use invocable actions to create benefit disbursement records for an eligible benefit assignment.

SEE ALSO:

Actions Developer Guide: Introducing Actions

REST API Developer Guide: Invocable Actions Standard

Benefit Disbursement Action

Create a benefit disbursement for an eligible benefit assignment. For example, create a benefit disbursement request to offer monetary benefits through direct cash assistance or subsidies.

This action is available in API version 57.0 and later.

Special Access Rules

To access the Benefit Disbursement action, your org must have the `Program and Benefit Management Access` and `Benefit Disbursement Access` permission set licenses.

Supported REST HTTP Methods

URI

`/services/data/v57.0/actions/standard/createBenefitDisbursement`

Formats

JSON

HTTP Methods

GET, POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
`benefitAssignmentId`	**Type** ID **Description** Required. The ID of the benefit assignment to be disbursed.
`defaultApprovalStatus`	**Type** string **Description** Required. Approval status of the benefit disbursement that's created or previewed. Possible values are: • `Approved` • `In Review` • `Not Applicable` • `Pending` • `Rejected`

Input	Details
`disbursementType`	**Type** string **Description** Number of disbursements to be previewed. Possible values are: • `SINGLE` • `ALL` A `SINGLE` disbursement type creates a preview of a single or one-time disbursement, whereas an `ALL` disbursement type creates a preview of a recurring disbursement.
`isPreview`	**Type** boolean **Description** Required. Indicates whether a preview of the disbursement details is created (`false`) or not (`true`).

Outputs

Output	Details
`benefitDisbursementIaOutput`	**Type** string **Description** The Apex output type that contains nested arrays in JSON format with details of the disbursement that's created or is to be previewed for the benefit assignment. The `benefitDisbursementIaOutput` output type contains an array of the `BenefitDisbursementIAOutput` Apex class. This output representation contains an array of the `BenefitDisbursementDetail` fields, while an array of `BenefitDisbursementAdjDetail` is contained in `BenefitDisbursementDetail`.

Example

GET

This example shows how to get the details of the Benefit Disbursement action type.

```
curl --include --request GET \
--header "Authorization: Authorization: Bearer 00DR...xyz" \
--header "Content-Type: application/json" \
"https://instance.salesforce.com/services/data/v57.0/actions/standard/createBenefitDisbursement"
```

POST

Here's a request for the Benefit Disbursement action.

```
{
   "inputs":[{
      "benefitAssignmentId" : "0nDxx0000000001EAA",
      "isPreview" : true,
      "disbursementType" : "SINGLE",
      "defaultApprovalStatus" : "Approved"
   }]
}
```

Here's a response for the Benefit Disbursement action.

```
[
   {
      "actionName" : "createBenefitDisbursement",
      "errors" : null,
      "isSuccess" : true,
      "outputValues" : {
          "resultantDisbursements": {
             "benefitAssignmentId": "0nDxx0000000001EAA",
             "benefitDisbursements": [{
                  "approvalStatus": "Approved",
                  "benefitDisbursementAdjs": [{
                      "adjustmentAmount": 100.0,
                      "adjustmentReason": "sample reason",
                      "benefitAssignmentAdjustmentId": "baaId",
                      "id": "bdAdj"
                   }],
                   "entitlementAmount": 800.0,
                   "id": "bdAdj",
                   "paymentStatus": null
              }],
              "previewMode": true
          }
       }
   }]
```

SEE ALSO:

Salesforce Help: Assign and Disburse Benefits to Eligible Applicants

Run Record Aggregation Batch Processing Definition Action

Runs a Data Processing Engine definition to process an asynchronous batch job that creates or updates record aggregation results.

This action is available in API version 59.0 and later.

Special Access Rules

To access the Run Record Aggregation Batch Processing Definition action, you must have the Record Aggregation permission set license, and you must have the Record Aggregation Access permission.

Supported REST HTTP Methods

URI

`/services/data/v59.0/actions/standard/runRecordAggrBatchProcDef`

Formats

JSON

HTTP Methods

GET, POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
`executionReferenceId`	**Type** ID **Description** Required. The ID of a record aggregation definition or a Data Processing Engine definition to run to refresh data aggregation.

Outputs

Output	Details
`accepted`	**Type** boolean **Description** Indicates whether the specified Data Processing Engine definition was accepted for processing (`true`) or not (`false`).
`batchJobId`	**Type** string **Description** The ID of the batch job that was created.

Example

GET

This example shows how to get the details of the Run Record Aggregation Batch Processing Definition action type.

```
curl --include --request GET \
--header "Authorization: Authorization: Bearer 00DR...xyz" \
--header "Content-Type: application/json" \
"https://instance.salesforce.com/services/data/v59.0/actions/standard/runRecordAggrBatchProcDef"
```

POST

Here's a request for the Run Record Aggregation Batch Processing Definition action.

```
{
   "inputs":[
      {
         "executionReferenceId": "16ySB000000003FYAQ"
      }
   ]
}
```

Here's a response for the Run Record Aggregation Batch Processing Definition action.

```
[
  {
    "actionName": "runRecordAggrBatchProcDef",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "batchJobId": "0mdSB0000000dSnYAI",
      "accepted": true
    },
    "version": 1
  }
]
```

CHAPTER 6 Public Sector Solutions Tooling API Objects

In this chapter ...

- ApplicationRecordTypeConfig

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**.

ApplicationRecordTypeConfig

Configuration that maps object record types to an application. This object is available in API version 50.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`ApplicationUsageType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Count of application records used. Possible values are: • Benefit Assistance • Composable Case Management • Education Cloud • Grantmaking • Health Cloud • Others • Public Sector Application Forms
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The developer name for ApplicationRecordTypeConfig.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description The language of the account record type configuration.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Name of the application record type configuration.
`ObjectName`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Objects used by Licensing and Permitting Management and Emergency Response Management. Possible values are: • Business License Application • Individual Application
`RecordTypeName`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of RecordType that was created for Individual Application.

CHAPTER 7 Public Sector Solutions Metadata API Types

In this chapter ...

- ApplicationRecordTypeConfig
- DocumentChecklistSettings
- Flow for Public Sector Solutions
- IndustriesSettings

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**.

ApplicationRecordTypeConfig

Configuration that maps object record types to an application. This object is available in API version 57.0 and later.

Parent Type

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

File Suffix and Directory Location

ApplicationRecordTypeConfig components have the suffix `.applicationRecordTypeConfig` and are stored in the `ApplicationRecordTypeConfig` folder.

Version

ApplicationRecordTypeConfig components are available in API version 57.0 and later.

Special Access Rules

You must have ApplicationRecordTypeConfigAccess org access to use this metadata type.

Fields

Field Name	Description
`applicationObjectName`	**Field Type** ApplicationObjectName (enumeration of type string) **Description** Required. Objects used by Licensing and Permitting Management and Emergency Response Management. Valid values are: • `BusinessLicenseApplication` • `IndividualApplication`
`applicationUsageType`	**Field Type** ApplicationUsageType (enumeration of type string) **Description** Required. Count of application records used. Values are: • `BA`- Benefit Assistance • `CCM`- Composable Case Management • `EDU`- Education Cloud

Field Name	Description
	• `ERM`- Emergency Response Management • `Grantmaking` • `HC`- Health Cloud • `LPI`- Licensing, Permitting, and Inspections
`recordTypeName`	**Field Type** string **Description** Required. The name of the record type that was created for Individual Application.

Declarative Metadata Sample Definition

The following is an example of an ApplicationRecordTypeConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ApplicationRecordTypeConfig xmlns="http://soap.sforce.com/2006/04/metadata">

    <applicationUsageType>LPI</applicationUsageType>
    <applicationObjectName>IndividualApplication</applicationObjectName>
    <recordTypeName>IADriversLicense</recordTypeName>
</ApplicationRecordTypeConfig>
```

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

```
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>ApplicationRecordTypeConfig</name>
    </types>
    <version>57.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

DocumentChecklistSettings

Represents an org's DocumentChecklistItem settings. This type extends the Metadata metadata type and inherits its `fullName` field.

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

File Suffix and Directory Location

DocumentChecklistSettings components are stored in the `DocumentChecklist.settings` file in the `settings` folder. The `.settings` files are different from other named components because there's only one settings file for each settings component.

Version

DocumentChecklistSettings components are available in API versions 55.0 and later.

Fields

Field Name	Field Type	Description
`dciCustomSharing`	boolean	Indicates whether the custom sharing rule for document checklist items is enabled for your org (`true`) or not (`false`). The default value is `false`.
`deleteDCIWithFiles`	boolean	Indicates whether deletion of document checklist items is enabled for your org (`true`) or not (`false`). The default value is `false`.

Declarative Metadata Sample Definition

The following is an example of a DocumentChecklistSettings.settings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DocumentChecklistSettings
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <dciCustomSharing>true</dciCustomSharing>
 <deleteDCIWithFiles>true</deleteDCIWithFiles>
</DocumentChecklistSettings>
```

Example Package Manifest

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>DocumentChecklist</members>
  <name>Settings</name>
 </types>
 <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

The wildcard character `*` (asterisk) in the `package.xml` manifest file doesn't apply to metadata types for feature settings. The wildcard applies only when retrieving all settings, not for an individual setting. For details, see Settings. For information about using the manifest file, see Deploying and Retrieving Metadata with the Zip File.

Flow for Public Sector Solutions

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

Public Sector Solutions exposes additional actionType values for the FlowActionCall Metadata type. For more information on Flow and FlowActionCall Metadata Type, see Flow.

Field Name	Field Type	Description
`actionType`	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Public Sector Solutions include: • `createBenefitDisbursement`—Create a benefit disbursement for an eligible benefit assignment. For example, create a benefit disbursement request to offer monetary benefits through direct cash assistance or subsidies. Available in API version 57.0 and later. • `runRecordAggrBatchProcDef`—Runs a Data Processing Engine definition to process an asynchronous batch job that creates or updates record aggregation results. Available in API version 59.0 and later.

IndustriesSettings

Represents settings for Public Sector Solutions Cloud.

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

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

File Suffix and Directory Location

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

Version

Industries settings for Public Sector Solutions Cloud are available in API version 57.0 and later.

Fields

Field Name	Field Type	Description
enableBenefitAndGoalSharingPref	boolean	Indicates whether the benefit and goal sharing feature is enabled for your org. The default is false. Available in editions where Public Sector Solutions is enabled.
enableBenefitManagementPreference	boolean	Indicates whether the program and benefit management feature is enabled for your org. The default is false. Available in editions where Public Sector Solutions is enabled.
enableCarePlansPreference	boolean	Indicates whether the care plan feature is enabled for your org. The care plan feature lets you create and edit care plans. The default is false. Available in editions where Public Sector Solutions is enabled. This field is available in API version 58.0 and later.
enableEnhancedUIForISPref		Indicates whether the enhanced interaction note interface feature is enabled for your org. The enhanced interaction note interface is a single guided flow that enables you to seamlessly create meeting notes; add interaction details, attendees, and interest tags; and share the notes with other users. The default is false. Available in editions where Public Sector Solutions is enabled. This field is available in API version 61.0 and later.

Declarative Metadata Sample Definition

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

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesSettings xmlns="http://soap.sforce.com/2006/04/metadata">
   <enableBenefitAndGoalSharingPref>true</enableMultipleTopicsForShiftsOrgPref>
   <enableBenefitManagementPreference>true</enableMultipleTopicsForShiftsOrgPref>
   <enableCarePlansPreference>true</enableCarePlansPreference>
</IndustriesSettings>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
   <types>
       <members>Industries</members>
       <name>Settings</name>
   </types>
   <version>57.0</version>
</Package>
```

CHAPTER 8 Public Sector Solutions Associated Objects

In this chapter ...

- StandardObjectNameShare
- StandardObjectNameFeed
- StandardObjectNameOwnerSharingRule
- StandardObjectNameHistory
- StandardObjectNameChangeEvent

This section provides a list of objects associated to Public Sector Solutions standard objects with their standard fields.

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

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

*StandardObjectName*Share

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field Name	Details
`AccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The level of access allowed. Values are: • `All` (owner) • `Edit` (read/write) • `Read` (read only)
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the parent record.
`RowCause`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort

Field Name	Details
	Description Reason that the sharing entry exists.
`UserOrGroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the user or group that has been given access to the object.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- AssessmentIndicatorDefinitionShare
- AssessmentTaskDefinitionShare
- BusinessLicenseShare
- CourseOfferingShare
- ExaminationShare
- InspectionTypeShare
- PersonExaminationShare
- PartyFinancialAsset
- PreliminaryApplicationRefShare
- RegulatoryAuthorityShare
- RegulatoryAuthorizationTypeShare
- RegulatoryCodeViolationShare
- TrainingCourseParticipantShare
- TrnCourseShare
- ViolationTypeShare
- RegulatoryTrxnFeeShare
- BusinessTypeShare

*StandardObjectName*Feed

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

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

Supported Calls

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

Special Access Rules

In the internal org, users can delete all feed items they created. This rule varies in Experience Cloud sites where threaded discussions and delete-blocking are enabled. Site 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.

Fields

Field	Details
`BestCommentId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the comment marked as best answer on a question post.
`Body`	**Type** textarea **Properties** Nillable, Sort **Description** The body of the post. Required when `Type` is `TextPost`. Optional when `Type` is `ContentPost` or `LinkPost`.
`CommentCount`	**Type** int **Properties** Filter, Group, Sort

Field	Details
	Description The number of comments associated with this feed item.
`ConnectionId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** When a PartnerNetworkConnection modifies a record that is tracked, the `CreatedBy` field contains the ID of the system administrator. The `ConnectionId` contains the ID of the PartnerNetworkConnection. Available if Salesforce to Salesforce is enabled for your organization.
`InsertedById`	**Type** reference **Properties** Group, Nillable, Sort **Description** ID of the user who added this item to the feed. For example, if an application migrates posts and comments from another application into a feed, the `InsertedBy` value is set to the ID of the context user.
`isRichText`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the feed item `Body` contains rich text. If you post a rich text feed comment using SOAP API, set `IsRichText` to `true` and escape HTML entities from the body. Otherwise, the post is rendered as plain text. Rich text supports the following HTML tags: • `<p>` Tip: Though the ` ` tag isn't supported, you can use `<p> </p>` to create lines. • `<a>` • `<b>` • `<code>` • `<i>` • `<u>` • `<s>` • `<ul>`

Field	Details
	• `<ol>` • `<li>` • `<img>` The `<img>` tag is accessible only through the API and must reference files in Salesforce similar to this example: `<img src="sfdc://069B0000000omjh"></img>` Note: In API version 35.0 and later, the system replaces special characters in rich text with escaped HTML. In API version 34.0 and prior, all rich text appears as a plain-text representation.
`LikeCount`	**Type** int **Properties** Filter, Group, Sort **Description** The number of likes associated with this feed item.
`LinkUrl`	**Type** url **Properties** Nillable, Sort **Description** The URL of a `LinkPost`.
`NetworkScope`	**Type** picklist **Properties** Group, Nillable, Restricted picklist, Sort **Description** Specifies whether this feed item is available in the default Experience Cloud site, a specific Experience Cloud site, or all sites. This field is available in API version 26.0 and later, if digital experiences is enabled for your org. `NetworkScope` can have the following values: • `NetworkId`—The ID of the Experience Cloud site in which the FeedItem is available. If left empty, the feed item is only available in the default Experience Cloud site. • `AllNetworks`—The feed item is available in all Experience Cloud sites. Note the following exceptions for `NetworkScope`: • Only feed items with a Group or User parent can set a `NetworkId` or a null value for `NetworkScope`. • For feed items with a record parent, users can set `NetworkScope` only to `AllNetworks`.

Field	Details
	• You can't filter a feed item on the `NetworkScope` field.
`ParentId`	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the record that is tracked in the feed. The detail page for the record displays the feed.
`RelatedRecordId`	**Type** reference **Properties** Group, Nillable, Sort **Description** ID of the ContentVersion record associated with a `ContentPost`. This field is null for all posts except `ContentPost`.
`Title`	**Type** string **Properties** Group, Nillable, Sort **Description** The title of the feed item. When the `Type` is `LinkPost`, the `LinkUrl` is the URL and this field is the link name.
`Type`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of feed item. Values are: • `ActivityEvent`—indirectly generated event when a user or the API adds a Task associated with a feed-enabled parent record (excluding email tasks on cases). Also occurs when a user or the API adds or updates a Task or Event associated with a case record (excluding email and call logging). For a recurring Task with CaseFeed disabled, one event is generated for the series only. For a recurring Task with CaseFeed enabled, events are generated for the series and each occurrence. • `AdvancedTextPost`—created when a user posts a group announcement and, in Lightning Experience as of API version 39.0 and later, when a user shares a post. • `AnnouncementPost`—Not used. • `ApprovalPost`—generated when a user submits an approval.

Field	Details
	• `BasicTemplateFeedItem`—Not used. • `CanvasPost`—a post made by a canvas app posted on a feed. • `CollaborationGroupCreated`—generated when a user creates a public group. • `CollaborationGroupUnarchived`—Not used. • `ContentPost`—a post with an attached file. • `CreatedRecordEvent`—generated when a user creates a record from the publisher. • `DashboardComponentAlert`—generated when a dashboard metric or gauge exceeds a user-defined threshold. • `DashboardComponentSnapshot`—created when a user posts a dashboard snapshot on a feed. • `LinkPost`—a post with an attached URL. • `PollPost`—a poll posted on a feed. • `ProfileSkillPost`—generated when a skill is added to a user's Chatter profile. • `QuestionPost`—generated when a user posts a question. • `ReplyPost`—generated when Chatter Answers posts a reply. • `RypplePost`—generated when a user creates a Thanks badge in WDC. • `TextPost`—a direct text entry on a feed. • `TrackedChange`—a change or group of changes to a tracked field. • `UserStatus`—automatically generated when a user adds a post. Deprecated.
`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 digital experiences is enabled for your org. `Visibility` can have the following values: • `AllUsers`—The feed item is available to all users who have permission to see the feed item. • `InternalUsers`—The feed item is available to internal users only. Note the following exceptions for `Visibility`: • For record posts, `Visibility` is set to `InternalUsers` for all internal users by default. • External users can set `Visibility` only to `AllUsers`. • On user and group posts, only internal users can set `Visibility` to `InternalUsers`.

Usage

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

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

Objects That Follow This Model

These objects follow the standard pattern for associated objects.

- AssessmentTaskDefinition
- AssessmentTaskIndDefinition
- BusinessLicense
- BusinessLicenseApplication
- BusinessProfile
- BusinessType
- BusRegAuthorizationType
- BusRegAuthTypeDependency
- CourseOffering
- IndividualApplication
- InspectionAssessmentInd
- RegulatoryAuthorizationType
- RegulatoryCodeViolationFeed
- RegulatoryTrxnFee
- RegulatoryTrxnFeeItem
- TrainingCourseParticipant
- ViolationEnforcementAction
- ViolationType
- ViolationTypeAssessmentInd
- Visit
- Visitor

*StandardObjectName*OwnerSharingRule

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

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field Name	Details
`AccessLevel`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Determines the level of access users have to records. Values are: • `Read` (read only) • `Edit` (read/write)
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** Description of the sharing rule. Maximum length is 1000 characters.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the

Field Name	Details
	object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance slows down while Salesforce generates one for each record.
`GroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the source group. Records that are owned by users in the source group trigger the rule to give access.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Label of the sharing rule as it appears in the UI. Maximum length is 80 characters.
`UserOrGroupId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the user or group that you are granting access to.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- AssessmentTaskContentDocumentOwnerSharingRule
- AssessmentIndicatorDefinitionOwnerSharingRule
- AssessmentTaskDefinitionOwnerSharingRule
- BusinessLicenseOwnerSharingRule
- CourseOfferingOwnerSharingRule
- ExaminationOwnerSharingRule
- InspectionTypeOwnerSharingRule
- PersonExaminationOwnerSharingRule

- PartyFinancialAsset
- PreliminaryApplicationRefOwnerSharingRule
- PublicComplaintOwnerSharingRule
- RegulatoryAuthorityOwnerSharingRule
- RegulatoryAuthorizationTypeOwnerSharingRule
- RegulatoryCodeViolationOwnerSharingRule
- TrainingCourseParticipantOwnerSharingRule
- TrnCourseOwnerSharingRule
- ViolationTypeOwnerSharingRule
- RegulatoryTrxnFeeOwnerSharingRule
- BusinessTypeOwnerSharingRule

*StandardObjectName*History

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

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

Supported Calls

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

Special Access Rules

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

Fields

Field Name	Details
*StandardObjectName*Id	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the standard object.
DataType	**Type** picklist

Field Name	Details
	Properties Filter, Group, Nillable, Restricted picklist, Sort **Description** Data type of the field that was changed.
`Field`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Name of the field that was changed.
`NewValue`	**Type** anyType **Properties** Nillable, Sort **Description** New value of the field that was changed.
`OldValue`	**Type** anyType **Properties** Nillable, Sort **Description** Old value of the field that was changed.

Objects That Follow This Model

These objects follow the standard pattern for associated feed objects.

- BusinessLicenseHistory
- BusinessLicenseApplicationHistory
- BusinessProfileHistory
- BusinessTypeHistory
- BusRegAuthorizationTypeHistory
- BusRegAuthTypeDependencyHistory
- CourseOfferingHistory
- IndividualApplicationHistory
- InspectionAssessmentIndHistory
- PartyExpenseHistory
- PartyFinancialAssetHistory

- PartyIncomeHistory
- PublicApplicationParticipantHistory
- TrainingCourseParticipantHistory
- RegulatoryAuthorizationTypeHistory
- RegulatoryTrxnFeeHistory
- RegulatoryTrxnFeeItemHistory
- ViolationTypeAssessmentIndHistory
- VisitorHistory

*StandardObjectName*ChangeEvent

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

Supported Calls

`describeSObjects()`

Special Access Rules

- 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.

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

API Version and Schema

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

Usage

For more information about Change Data Capture, see Change Data Capture Developer Guide.

Objects That Support Change Events

The following objects have associated ChangeEvent objects.

- Accreditation
- Award
- BoardCertification
- BusinessLicense
- BusinessLicenseApplication
- CareProviderAdverseAction
- CareProviderFacilitySpecialty
- CodeSet
- CodeSetBundle
- HealthcareProvider
- HealthcareProviderNpi
- HealthcareProviderSpecialty
- IndividualApplication
- InsurancePolicy
- OperatingHours
- PartyIncome
- PartyExpense
- PartyFinancialAsset
- PersonEmployment
- ReceivedDocumentType
- RegulatoryCode
- RegulatoryCodeViolation
- TimelineObjectDefinition
- TimeSlot
- ViolationType

CHAPTER 9 StandardValueSet Names and Standard Picklist Fields

This table lists the names of standard picklists as standard value sets and their corresponding field names.

Note: The names of standard value sets and picklist fields are case-sensitive.

Standard Value Set Name	Field Name
DataType	AssessmentIndicatorDefinition.DataType
AssessmentTaskStatus	AssessmentTask.Status
AssessmentTaskType	AssessmentTask.TaskType
ATDTaskType	AssessmentTaskDefinition.TaskType
WorkDay	AuthLocationAccessSchedule.WorkDay
BLicenseJurisdictionType	BusinessLicense.JurisdictionType
BusinessLicenseStatus	BusinessLicense.Status
BLicenseVerificationStatus	BusinessLicense.VerificationStatus
LPIAppInCategory	BusinessLicenseApplication.ApplicationCategory
LPIAppInType	BusinessLicenseApplication.ApplicationType
RegAuthCategory	BusinessLicenseApplication.Category
LPIAppInStatus	BusinessLicenseApplication.Status
BusinessStructure	BusinessProfile.BusinessStructure
AuthorizationActivityType	BusinessType.AuthorizationActivityType
LPIIndustry	BusinessType.Industry
ComplaintParticipantRole	ComplaintParticipant.Role
ComplaintParticipantStatus	ComplaintParticipant.Status
LPIExaminationStatus	Examination.Status
LPIAppInCategory	IndividualApplication.ApplicationCategory
LPIAppInType	IndividualApplication.ApplicationType
IaAuthCategory	IndividualApplication.Category

Standard Value Set Name	Field Name
IaAppInStatus	IndividualApplication.Status
AssessmentIndResult	InspectionAssessmentInd.Result
EducationLevel	PersonEducation.EducationLevel
EducationStatusType	PersonEducation.Status
VerificationStatusType	PersonEducation.VerificationStatus
LPIPXMInstitutionNameEnum	PersonExamination.InstituitionName
LPIPXMResultTypeEnum	PersonExamination.Result
LPIPXMVerificationStatusTypeEnum	PersonExamination.VerificationStatus
PreliminaryApplicationType	PreliminaryApplicationRef.ApplicationType
BenefitEligibilityEnum	PublicApplicationParticipant.BenefitEligibilityStatus
RelationshipWithPrimaryEnum	PublicApplicationParticipant.RelationshipType
PublicAppParticipantRole	PublicApplicationParticipant.Role
PublicAppParticipantStatus	PublicApplicationParticipant.Status
PolygonDataType	Polygon.DataType
LPIPubCmpltSubType	PublicComplaint.ComplaintSubType
LPIPubCmpltType	PublicComplaint.ComplaintType
LPIPubCmpltPrty	PublicComplaint.Priority
LPIPubCmpltStatus	PublicComplaint.Status
ProcessingDurationType	RegulatoryAuthorizationType.DurationType
RegulatoryAuthCategoryType	RegulatoryAuthorizationType.RegulatoryAuthCategory
RegulatoryCodeType	RegulatoryCode.Type
RegCodeViolationPriority	RegulatoryCodeViolation.Priority
RegCodeViolationStatus	RegulatoryCodeViolation.Status
RegulatoryTrxnFeeStatus	RegulatoryTrxnFee.Status
InstitutionNameType	TrainingCourseParticipant.InstituitionName
ResultType	TrainingCourseParticipant.Result
LPITrainingCourseStatus	TrnCourse.Status
LPIVltnEnfActPrty	ViolationEnforcementAction.Priority
LPIVltnEnfActStatus	ViolationEnforcementAction.Status
LPIVltnEnfActType	ViolationEnforcementAction.Type

Standard Value Set Name	Field Name
ViolationSeverity	ViolationType.Severity
CategoryType	ViolationType.Type
VisitStatus	Visit.Status
VisitPriority	Visit.VisitPriority

CHAPTER 10 Introduction to Accounting Subledger

In this chapter ...

- Accounting Subledger Data Model Overview
- Accounting Subledger Standard Objects
- Accounting Subledger Fields on Standard Objects
- Accounting Subledger Metadata Types
- Settings

Give accounting teams neatly packaged financial CRM data for record-keeping.

Accounting Subledger consolidates data between Salesforce CRM and your accounting system to help you manage your accounting department. This consolidation helps you understand how and where funds are received, paid, and allocated.

EDITIONS

Available in: Lightning Experience in **Performance**, **Enterprise**, **Developer**, and **Unlimited** editions that have Accounting Subledger enabled.

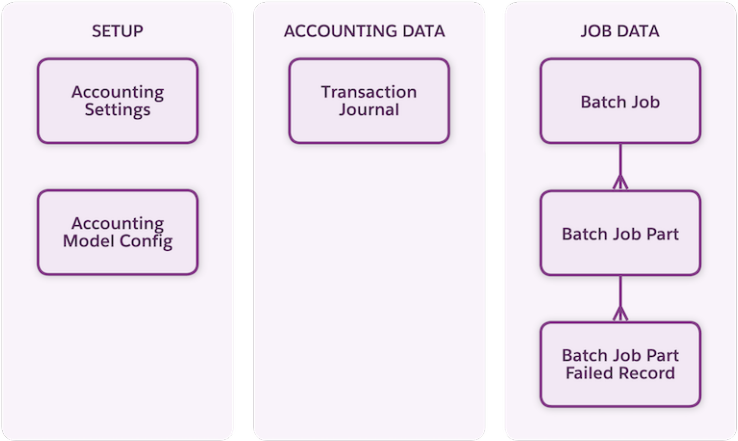
Accounting Subledger Data Model Overview

Learn about the objects and relationships within the Accounting Subledger data model.

EDITIONS

Available in: Lightning Experience in **Performance**, **Enterprise**, **Developer**, and **Unlimited** editions that have Accounting Subledger enabled.

Accounting Subledger: Overview



Accounting Subledger Standard Objects

This section lists standard objects available for use with Accounting Subledger.

Some fields may not be listed for some objects. To verify the complete list of fields for an object, you can use a describe call from the API, or inspect with an appropriate tool, for example, inspecting the WSDL or using a schema viewer.

EDITIONS

Available in: Lightning Experience in **Performance**, **Enterprise**, **Developer**, and **Unlimited** editions that have Accounting Subledger enabled.

AccountingFieldMapping
Represents the custom field mappings used to populate transaction journal records with other Salesforce data. This object is available in API version 58.0 and later.

AccountingModelConfig
Represents settings for the accounting models used with Accounting Subledger. Accounting models are based on accounting sets, which include details about what accounting data is used and how. This object is available in API version 57.0 and later.

AccountingFieldMapping

Represents the custom field mappings used to populate transaction journal records with other Salesforce data. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountingModelConfigId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The accounting set associated with the accounting field mapping record. This field is a relationship field. **Relationship Name** AccountingModelConfig **Relationship Type** Lookup **Refers To** AccountingModelConfig
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the person who created the accounting field mapping.
`IsForAllocationType`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether this supplemental mapping applies to transaction journal records of allocation type (true) or not (false). The default value is `false`.
`IsForPaymentType`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether this supplemental mapping applies to transaction journal records of payment type (true) or not (false). The default value is `false`.

Field	Details
`IsForTransactionType`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether this supplemental mapping applies to transaction journal records of transaction type (true) or not (false). The default value is `false`.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the language used. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`MappingBehavior`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description If set to PointInTime, the target field's data is mapped from the source field only when the transaction journal record is created. If set to CurrentValue, Accounting Subledger reverses and replaces the generated transaction journal records when the value on the transaction journal record is different from the source field value (for example, when you update the source field or the generated record). Possible values are: • `CurrentValue`—Current Value • `PointInTime`—Point-in-Time The default value is `PointInTime`.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The standard name of the accounting set on the UI.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix of the accounting set.
`SourceField`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The API name of the field on the source object that is mapped to the target field. Possible values are: • `OM_1_Primary__c.Amount__c` • `OM_1_Primary__c.Check_Reference_Number__c` • `OM_1_Primary__c.CloneSourceId` • `OM_1_Primary__c.Committed_Date__c` • `OM_1_Primary__c.CreatedById` • `OM_1_Primary__c.CreatedDate` • `OM_1_Primary__c.Fund_Account_Name__c` • `OM_1_Primary__c.Generate_Expected__c`

Field	Details
	• OM_1_Primary__c.Id • OM_1_Primary__c.IsDeleted • OM_1_Primary__c.LastModifiedById • OM_1_Primary__c.LastModifiedDate • OM_1_Primary__c.LastReferencedDate • OM_1_Primary__c.LastViewedDate • OM_1_Primary__c.Name • OM_1_Primary__c.OwnerId • OM_1_Primary__c.Paid__c • OM_1_Primary__c.Payment_Date__c • OM_1_Primary__c.Payment_Method__c • OM_1_Primary__c.RecordTypeId • OM_1_Primary__c.RecordVisibilityId • OM_1_Primary__c.Scheduled_Date__c • OM_1_Primary__c.SystemModstamp • OM_1_Primary__c.Transaction_Date__c • OM_1_Primary__c.UserRecordAccessId • OM_1_Primary__c.Written_Off__c • OM_1_Primary__c.temp__c
TargetField	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The API name of the field on the transaction journal record for this mapping. Possible values are: • CreatedDate

AccountingModelConfig

Represents settings for the accounting models used with Accounting Subledger. Accounting models are based on accounting sets, which include details about what accounting data is used and how. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountingType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of accounting. Possible values are: • `Expense` • `Revenue` The default value is `Revenue`.
`DefaultAccrualAccountCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the default accrual account.
`DefaultWriteOffAccountCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the account for payments that are written off.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the person who created the accounting set.
`EarliestCreatedDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** Source records with a primary record Created Date that is older than this date are not considered part of this mapping set.

Field	Details
`ExpectedCashFlowGrouping`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Determines how transaction journal records are generated for expected revenue scenarios. Possible values are: • `GroupByFundAccount`—Group by Fund Account • `GroupByFundAndDueDate`—Group by Fund Account and Due Date The default value is `GroupByFundAccount`.
`FullName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique name for the accounting set record.
`InternalMappingDetails`	**Type** textarea **Properties** Create, Nillable, Update **Description** JSON that is used to transmit financial data to Accounting Subledger for processing.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether Accounting Subledger processes this accounting set (true) or not (false). The default value is `false`.
`IsUsed`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether the accounting set was used or activated at least once. If it was, you can't select another object for the object model, or change its number of objects.

Field	Details
	The default value is `false`.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the language used. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The standard name of the accounting set on the UI.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description The namespace prefix of the accounting set.
`PaidCashFlowGrouping`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies how journal entries are generated for expense scenarios. Possible values are: • `GroupByFundAccount`—Group by Fund Account • `GroupBySummary`—Group by Summary The default value is `GroupBySummary`.
`RecordTypeFilter`	**Type** textarea **Properties** Create, Nillable, Update **Description** Information is generated only for records whose primary record's record type is listed. If no record types are defined, all source records are considered eligible. The value is case-sensitive, and a semicolon-delimited API name.
`RunOrder`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the sequence in which the accounting set is processed if there is more than one. The Accounting Subledger job processes the accounting set with the lower number first. For example, run order 1 is processed before run order 2.

Accounting Subledger Fields on Standard Objects

This section lists Accounting Subledger fields available with standard Salesforce objects. These fields are available only in orgs where Accounting Subledger is enabled.

TransactionJournal
Represents information about journal records. This object is available in API version 57.0 and later.

EDITIONS

Available in: Lightning Experience in **Performance**, **Enterprise**, **Developer**, and **Unlimited** editions that have Accounting Subledger enabled.

TransactionJournal

Represents information about journal records. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountingModelConfigName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the accounting set.
`Comment`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the transaction journal record.
`CreditAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The amount that is credited.

Field	Details
`CurrencyIsoCode`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of currency. Possible values are your personal (if set) or your corporate currency. The default value is your corporate currency.
`DebitAmount`	**Type** currency **Properties** Filter, Nillable, Sort **Description** The amount that is debited.
`DueDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the transaction is due.
`FundAccountRecordIdValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the fund account record identifier.
`FundAccountValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the fund account.
`GeneralLedgerCode`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The code of the associated general ledger.
`IsAccrualJournalEntry`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether the record is an accrual journal entry (true) or not (false). The default value is `false`.
`IsAdjustmentJournalEntry`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether the record is an adjustment journal entry (true) or not (false). The default value is `false`.
`IsHistoricalJournalEntry`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether the record is a historical journal entry (true) or not (false). The default value is `false`.
`IsRelatedJournalEntry`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether the record is a related journal entry (true) or not (false). The default value is `false`.
`IsWriteOffJournalEntry`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Determines whether the record is a write-off journal entry (true) or not (false).

Field	Details
	The default value is `false`.
`JournalReason`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the reason for the journal record. Possible values are: • `Credit` • `Debit`
`PaymentDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date of the payment.
`PrimaryRecordIdValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the primary record identifier.
`SecondaryRecordIdValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the secondary record identifier.
`TransactionAmount`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The amount in the transaction.

Field	Details
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the type of usage. Possible values are: • `AccountingSubledger`—Accounting Subledger • `Loyalty` • `Rebates`

Accounting Subledger Metadata Types

This section lists metadata types available for use with Accounting Subledger. Metadata API enables you to access some types and feature settings that you can customize in the user interface.

EDITIONS

Available in: Lightning Experience in **Performance**, **Enterprise**, **Developer**, and **Unlimited** editions that have Accounting Subledger enabled.

AccountingFieldMapping
Represents the accounting field mappings to organize your data and bring it to ledger entry records.

AccountingModelConfig
Represents the mapping of the financial data model to a logical data model and configuration for the generation of Transaction Journal records.

Flow for Accounting Subledger
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.

AccountingFieldMapping

Represents the accounting field mappings to organize your data and bring it to ledger entry records.

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

AccountingFieldMapping components have the suffix `.accountingFieldMapping` and are stored in the `accountingFieldMappings` folder.

Version

AccountingFieldMapping components are available in API version 58.0 and later.

Fields

Field Name	Description
`accountingModelConfig`	**Field Type** string **Description** Required. Record ID of the AccountingModelConfig record that the Field Mapping is associated with.
`isForAllocationType`	**Field Type** boolean **Description** Reserved for internal use.
`isForPaymentType`	**Field Type** boolean **Description** Reserved for internal use.
`isForTransactionType`	**Field Type** boolean **Description** Reserved for internal use.
`isProtected`	**Field Type** boolean **Description** Indicates whether this component is protected (`true`) or not protected (`false`). Default value is `false`.
`mappingBehavior`	**Field Type** MappingBehaviorType (enumeration of type string)

Field Name	Description
	Description Required. Specifies how the target's field data is mapped from the source field only when the journal entry is created. When set to `CurrentValue`, Subledger reverses and replaces journal entries whose value differs from the value in `sourceField`. Valid values are: • `CurrentValue` • `PointInTime`
`masterLabel`	**Field Type** string **Description** Required. A user-friendly name for AccountingFieldMapping, which is defined when the AccountingFieldMapping is created.
`sourceField`	**Field Type** string **Description** The API name of the field on the source object that is mapped to the target field.
`targetField`	**Field Type** string **Description** Required. The API name of the field on the Transaction Journal record for this mapping.

Declarative Metadata Sample Definition

The following is an example of an AccountingFieldMapping component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AccountingFieldMapping xmlns="http://soap.sforce.com/2006/04/metadata">
 <accountingModelConfig>ModelConfigOne</accountingModelConfig>
 <fullName>FieldMappingOne</fullName>
 <masterLabel>FieldMappingOne</masterLabel>
 <isForAllocationType>true</isForAllocationType>
 <isForPaymentType>true</isForPaymentType>
 <isForTransactionType>true</isForTransactionType>
 <mappingBehavior>PointInTime</mappingBehavior>
 <sourceField>TransactionJournal.MappingTargetOne__c</sourceField>
 <targetField>MappingTargetOne__c</targetField>
```

```
 <isProtected>false</isProtected>
</AccountingFieldMapping>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>FieldMappingOne</members>
  <name>AccountingFieldMapping</name>
 </types>
 <version>58.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

AccountingModelConfig

Represents the mapping of the financial data model to a logical data model and configuration for the generation of Transaction Journal records.

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

AccountingModelConfig components have the suffix `.accountingModelConfig` and are stored in the `accountingModelConfigs` folder.

Version

AccountingModelConfig components are available in API version 57.0 and later.

Fields

Field Name	Description
`accountingType`	**Field Type** AccountingType (enumeration of type string)

Field Name	Description
	Description Required. Determines whether the accounting set generates revenue or expense type transaction journal records. Valid values are: • `Expense` • `Revenue`
`defaultAccrualAccountCode`	**Field Type** string **Description** The code for your accounting system's default accrual account.
`defaultWriteOffAccountCode`	**Field Type** string **Description** Represents the name of your account for written off payments.
`earliestCreatedDate`	**Field Type** dateTime **Description** Required. The date used to filter source records for processing. The Accounting Subledger only considers records created on or after this date.
`expectedCashFlowGrouping`	**Field Type** ExpectedCashFlowGrouping (enumeration of type string) **Description** Determines whether Accounting Subledger groups transaction journal records by fund account or by a combination of fund account and due date. Note: Changing this setting doesn't impact existing records; it only affects records created or reversed afterward. Valid values are: • `GroupByFundAccount` • `GroupByFundAndDueDate`
`financeBook`	**Field Type** string **Description** Reserved for internal use.

Field Name	Description
`internalMappingDetails`	**Field Type** string **Description** Required. Represents the structure of your financial data in JSON format.
`isActive`	**Field Type** boolean **Description** Required. Indicates whether only records that are true are processed when the Subledger Job runs.
`isGroupedByFundAccount`	**Field Type** boolean **Description** Reserved for internal use.
`isUsed`	**Field Type** boolean **Description** Required. Indicates whether the Accounting Model has been used or activated at least once (`true`) or not (`false`). Note: If the value is set to `true`, you can't select another object for the object model or change the number of objects associated with that Accounting Model.
`jobFilterCriteria`	**Field Type** string **Description** Reserved for internal use.
`masterLabel`	**Field Type** string **Description** Required. A user-friendly name for AccountingModelConfig, which is defined when the AccountingModelConfig is created.

Field Name	Description
paidCashFlowGrouping	**Field Type** PaidCashFlowGrouping (enumeration of type string) **Description** Determines the level of detail for generated transaction journal records. Valid values are: • GroupByFundAccount—Accounting Subledger splits all transaction journal records into fund accounts. Secondary records are created for payment type records but not for transaction type records. • GroupBySummary—Accounting Subledger only splits credits for revenue and debits for expenses by fund accounts.
recordTypeFilter	**Field Type** string **Description** Specify the record type IDs from the primary object to be processed. This field is case-sensitive. Note: If no record type is specified in the filter, all records are processed.
runOrder	**Field Type** int **Description** Determines the load order sequence of the multiple Accounting Model. The lower number runs first. For example, load order 1 runs before load order 2.

Declarative Metadata Sample Definition

The following is an example of an AccountingModelConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AccountingModelConfig
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <fullName>ModelConfigOne</fullName>
 <masterLabel>ModelConfigOne</masterLabel>
 <defaultAccrualAccountCode>abc</defaultAccrualAccountCode>
 <defaultWriteOffAccountCode>abc</defaultWriteOffAccountCode>
 <isUsed>false</isUsed>
 <isActive>false</isActive>
 <runOrder>123</runOrder>
 <recordTypeFilter>abcabc</recordTypeFilter>
 <earliestCreatedDate>2021-12-01T00:00:00.000Z</earliestCreatedDate>
 <internalMappingDetails>abcabc</internalMappingDetails>
 <accountingType>Revenue</accountingType>
 <expectedCashFlowGrouping>GroupByFundAccount</expectedCashFlowGrouping>
```

```
 <paidCashFlowGrouping>GroupBySummary</paidCashFlowGrouping>
</AccountingModelConfig>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>ModelConfigOne</members>
  <name>AccountingModelConfig</name>
 </types>
 <version>57.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Flow for Accounting Subledger

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

Accounting Subledger exposes additional actionType values for the FlowActionCall Metadata type. For more information on Flow and FlowActionCall Metadata Type, see Flow.

Field Name	Field Type	Description
`actionType`	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Accounting Subledger include: • `generateTransactionJournals`—Generate transaction journal records. Available in API version 57.0 and later.

Settings

Represents the organization settings to control the update of non-qualifying points balance for members when points are credited.

AccountingSettings
Represents the settings for the Accounting Subledger feature.

AccountingSettings

Represents the settings for the Accounting Subledger feature.

Parent Type and Manifest Access

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

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

File Suffix and Directory Location

`AccountingSettings` values are stored in the `AccountingSettings.settings` file in the `settings` folder. The `.settings` files are different from other named components, because there is only one settings file for each settings component.

Version

AccountingSettings components are available in API version 57.0 and later.

Fields

Field Name	Description
`enableAccountingSubledger`	**Field Type** boolean **Description** Indicates whether Transaction Journal creation is enabled for the organization (`true`) or not (`false`).
`enableFinancePeriod`	**Field Type** boolean **Description** Reserved for internal use.
`enablePaymentMethodAdjust`	**Field Type** boolean **Description** Indicates whether changes to the Payment Method generate adjustments on Transaction Journal records (`true`) or not (`false`).
`enableScheduledJob`	**Field Type** boolean **Description** Reserved for internal use.

Field Name	Description
enableSkipReversalLogicEnabled	**Field Type** boolean **Description** Indicates whether Skip Reversal Logic is enabled (`true`) or not (`false`).

Declarative Metadata Sample Definition

The following is an example of an AccountingSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AccountingSettings
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <enableAccountingSubledger>true</enableAccountingSubledger>
 <enablePaymentMethodAdjust>true</enablePaymentMethodAdjust>
</AccountingSettings>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>Accounting</members>
  <name>Settings</name>
 </types>
 <version>57.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

CHAPTER 11 Action Launcher

In this chapter ...

- Action Launcher Tooling Objects
- Action Launcher Metadata Types

Add actions in the Action Launcher Lightning web component so that your users can search for and launch an action easily. So your users can now resolve customer requests and issues quickly and deliver better customer service. For example, users can initiate a fee-reversal flow or launch a service-order action from Action Launcher.

SEE ALSO:

Action Launcher

Action Launcher Tooling Objects

Tooling API exposes metadata used in developer tooling. You can access the metadata through REST or SOAP. Use Tooling API's SOQL capabilities for the various metadata types to retrieve smaller pieces of metadata.

For more information about Tooling API objects and supported objects, see Introducing Tooling API.

RecordActionDeployment
Represents configuration settings for the Actions & Recommendations, Action Launcher, and Bulk Action Panel components. RecordActionDeployment is available in API version 45.0 and later.

RecordActionDeployment

Represents configuration settings for the Actions & Recommendations, Action Launcher, and Bulk Action Panel components. RecordActionDeployment is available in API version 45.0 and later.

Supported SOAP Calls

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

Supported REST HTTP Methods

`GET, HEAD, PATCH, POST, DELETE`

Fields

Field	Details
`ChannelConfigurations`	**Type** mns:RecordActionDeploymentChannel **Properties** Not applicable. **Description** Channel default settings for the deployment. This field is visible only in the metadata for a record.
`ComponentName`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the name of the component used in the deployment. Possible values are: • `ActionsAndRecommendations`—0 • `ActionLauncher`—1

Field	Details
	• `BulkActionPanel`—2. This value is available in API version 60.0 and later. For example, a value of 1 indicates that 1 is stored in the database if Action Launcher is used to create a deployment. Available in API version 56.0 and later. Available in API version 56.0 and later.
`DeploymentContexts`	**Type** mns:RecordActionDeploymentContext **Properties** Not applicable. **Description** Object context for the deployment. This field is visible only in the metadata for a record. Available in API version 46.0 and later.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** A unique name for this record action deployment. 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. Provides a globally unique identifier for the record action deployment, which prevents conflicts with other record action deployments that have the same MasterLabel. Note: Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.
`FullName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name used as the record action deployment identifier for API access. The `fullName` can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. 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.
`HasGuidedActions`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort

Field	Details
	Description If `true`, indicates that the component shows standard actions; for example, flows and quick actions. Available in API version 46.0 and later.
`HasComponents`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record actions deployment includes components (`true`) or not (`false`).
`HasOmniscripts`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record actions deployment includes OmniScripts (`true`) or not (`false`). Available in API version 56.0 and later. The default value is `false`.
`HasRecommendations`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** If `true`, indicates that the component shows recommendations from a Next Best Action strategy. Available in API version 46.0 and later.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the record action deployment. The following values are supported: • Chinese (Simplified): `zh_CN` • Chinese (Traditional): `zh_TW` • Danish: `da` • Dutch: `nl_NL` • English: `en_US` • Finnish: `fi`

Field	Details
	• French: `fr` • German: `de` • Italian: `it` • Japanese: `ja` • Korean: `ko` • Norwegian: `no` • Portuguese (Brazil): `pt_BR` • Russian: `ru` • Spanish: `es` • Spanish (Mexico): `es_MX` Spanish (Mexico) defaults to Spanish for customer-defined translations. • Swedish: `sv` • Thai: `th` The Salesforce user interface is fully translated to Thai, but Help is in English.
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The name of the deployment.
`Metadata`	**Type** mns:RecordActionDeployment **Properties** Create, Nillable, Update

Field	Details
	Description Metadata that defines record action deployments. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with the record action deployment, which is assigned to the AppExchange package. 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. The namespace helps differentiate custom objects and fields from those in use by other record action deployments.
`Recommendation`	**Type** mns:RecordActionRecommendation **Properties** Not applicable. **Description** Settings for how Next Best Action recommendations appear. This field is visible only in the metadata for a record. Available in API version 46.0 and later.
`SelectableItems`	**Type** mns:RecordActionSelectableItem **Properties** Not applicable. **Description** A subset of actions that users can launch at runtime. This field is visible only in the metadata for a record.

Action Launcher Metadata Types

Use the Action Launcher metadata types to set up your Action Launcher deployment.

RecordActionDeployment

Represents configuration settings for the Actions & Recommendations, Action Launcher, and Bulk Action Panel components. For example, you can have a deployment that specifies which types of actions to display, default actions for channels, and the actions that users can add at runtime. If the component shows Next Best Action recommendations, the deployment configures which strategies to use and how recommendations appear. This type extends the Metadata metadata type and inherits its `fullName` field.

RecordActionDeployment

Represents configuration settings for the Actions & Recommendations, Action Launcher, and Bulk Action Panel components. For example, you can have a deployment that specifies which types of actions to display, default actions for channels, and the actions that users can add at runtime. If the component shows Next Best Action recommendations, the deployment configures which strategies to use and how recommendations appear. This type extends the Metadata metadata type and inherits its `fullName` field.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

File Suffix and Directory Location

RecordActionDeployment values are stored in the *`developer_name`*`.deployment` file in the `recordActionDeployments` directory.

Note: We don't recommend programmatically changing the API name of a RecordActionDeployment.

Version

RecordActionDeployment is available in API version 45.0 and later.

Fields

Field Name	Field Type	Description
`channelConfigurations`	RecordActionDeploymentChannel	Specifies configuration settings for different channels in an Actions & Recommendations deployment.
`componentName`	ComponentName (enumeration of type string)	Specifies the name of the component used in the deployment: • `ActionsAndRecommendations`—0 • `ActionLauncher`—1 • `BulkActionPanel`—2. This value is available in API version 60.0 and later For example, a value of 1 indicates that 1 is stored in the database if Action Launcher is used to create a deployment. Available in API version 56.0 and later.
`deploymentContexts`	RecordActionDeploymentContext	Specifies the object context for quick actions and Next Best Action strategies. Available in API version 46.0 and later.

Field Name	Field Type	Description
hasComponents	boolean	Indicates whether the record actions deployment includes components (true) or not (false). Available in API version 61.0 and later.
hasGuidedActions	boolean	Specifies that the component shows standard actions; for example, flows and quick actions. Available in API version 46.0 and later.
hasOmniscripts	boolean	Indicates whether the record actions deployment includes OmniScripts (true) or not (false). Available in API version 56.0 and later. The default value is false.
hasRecommendations	boolean	Specifies that the component shows recommendations from a Next Best Action strategy. Available in API version 46.0 and later.
masterLabel	string	Required. Specifies the name of the deployment.
recommendation	RecordActionRecommendation	Specifies settings for how Next Best Action recommendations appear in the component. Available in API version 46.0 and later.
selectableItems	RecordActionDeploymentSelectableItems	Specifies the actions that users can add at runtime.
shouldLaunchActionOnReject	boolean	Required. If true, launch the flow when the recommendation is rejected by the agent. Available in API version 48.0 and later.

RecordActionDefaultItem

Represents actions and attributes specified as channel defaults in a deployment.

Field Name	Field Type	Description
action	string	Required. Specifies the API name of an action. For example, the API name of a flow, such as Verify_Information.
isMandatory	boolean	Specifies whether the action is marked as mandatory. The default value is false.
isUiRemoveHidden	boolean	Specifies whether the remove option is hidden in the UI. The default value is false. If true, the UI hides the ability to remove the action from the list.
pinned	PinnedAction (enumeration of type string)	Required. Indicates whether the action is pinned to the Top or Bottom, or unpinned (None). The default value is None.
position	int	Required. Indicates the order of the action among all actions associated with this record.
type	RecordActionType (enumeration of type string)	Required. The type of action that's associated with the record. Valid values are: • Flow • QuickAction (Available in API version 46.0 and later.) • OmniScript (Available in API version 56.0 and later.) • LWC (Available in API version 62.0 and later.)

Field Name	Field Type	Description
		• `SvcCatalogItemDef` (Available in API version 62.0 and later.) • `WebLink` (Available in API version 62.0 and later.)

RecordActionDeploymentChannel

Specifies channel-specific defaults to show in the Actions & Recommendations component. The component displays the channel defaults when the list is otherwise empty.

Field Name	Field Type	Description
`channel`	ChannelSource (enumeration of type string)	Required. Specifies the channel. Valid values are `Phone`, `Chat`, or `Default`.
`channelItems`	RecordActionDefaultItem	Specifies default actions for a channel and attributes for each action, such as whether the action is pinned to the list top or bottom or whether an action is considered mandatory.
`isAutopopEnabled`	boolean	Specifies whether the first action in the list is launched when the record page opens. If `true`, the first action is launched. The default value is `false`.

RecordActionDeploymentContext

Specifies an object that provides context for quick actions and Next Best Action strategies. When the component appears on this type of page, it includes object-specific quick actions and uses an object-specific strategy to filter recommendations. Available in API version 46.0 and later.

Note: We support a maximum of 10 objects that provide context within a deployment.

Field Name	Field Type	Description
`entityName`	string	Required. Specifies the API name of an object to use as context.
`recommendationStrategy`	string	Specifies the API name of a Next Best Action strategy that overrides the default strategy on this page. A strategy is a metadata type RecommendationStrategy.

RecordActionRecommendation

Specifies settings to display Next Best Action recommendations in the component. Available in API version 46.0 and later.

Field Name	Field Type	Description
`defaultStrategy`	string	Specifies the API name of the default Next Best Action strategy, which is a metadata type, RecommendationStrategy.
`hasDescription`	boolean	Required. If `true`, display the description for the recommendation.
`hasImage`	boolean	Required. If `true`, display the image for the recommendation.

Field Name	Field Type	Description
hasRejectAction	boolean	Required. If true, display the label that the user clicks to reject the recommendation.
hasTitle	boolean	Required. If true, display the title for the recommendation.
maxDisplayRecommendations	int	Required. Specifies the maximum number of recommendations to display. Valid values are 1–4.

RecordActionSelectableItem

Represents the set of actions available for users to add to the component at runtime.

Field Name	Field Type	Description
action	string	Required. Specifies the API name of an action. For example, the API name of a flow, such as Verify_Information.
type	RecordActionType (enumeration of type string)	Required. The type of action that's associated with the record. Valid values are: • Flow • QuickAction (Available in API version 46.0 and later.) • OmniScript (Available in API version 56.0 and later.) • LWC (Available in API version 62.0 and later.) • SvcCatalogItemDef (Available in API version 62.0 and later.) • WebLink (Available in API version 62.0 and later.)
isFrequentAction	boolean	Indicates whether an action is frequently accessed by users (true) or not (false). Available in version 57.0 and later. This field applies only to Action Launcher.
frequentActionSequenceNbr	integer	The sequence number that's assigned to a frequently used action that's shown on Action Launcher. Available in version 57.0 and later. This field applies only to Action Launcher.

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.

Declarative Metadata Sample Definition

The following is a sample of a recordActionDeployment file.

```
<RecordActionDeployment xmlns="http://soap.sforce.com/2006/04/metadata">
    <channelConfigurations>
        <channel>Phone</channel>
```

```
        <channelItems>
            <action>Sample_Flow</action>
            <isMandatory>false</isMandatory>
            <isUiRemoveHidden>false</isUiRemoveHidden>
            <position>1</position>
            <pinned>Top</pinned>
            <type>Flow</type>
        </channelItems>
        <channelItems>
            <action>Another_Sample_Flow</action>
            <isMandatory>false</isMandatory>
            <isUiRemoveHidden>true</isUiRemoveHidden>
            <position>2</position>
            <pinned>Top</pinned>
            <type>Flow</type>
        </channelItems>
        <isAutopopEnabled>true</isAutopopEnabled>
    </channelConfigurations>
    <masterLabel>Sample Deployment</masterLabel>
    <selectableItems>
        <action>Sample_Flow</action>
        <type>Flow</type>
        <isFrequentAction>true</isFrequentAction>
        <frequentActionSequenceNbr>1</frequentActionSequenceNbr>
    </selectableItems>
    <selectableItems>
        <action>Sample_Flow_2</action>
        <type>Flow</type>
        <isFrequentAction>false</isFrequentAction>
    </selectableItems>
    <hasGuidedActions>true</hasGuidedActions>
    <hasRecommendations>true</hasRecommendations>
    <recommendation>
        <defaultStrategy>Sample_Global_Strategy</defaultStrategy>
        <maxDisplayRecommendations>4</maxDisplayRecommendations>
        <hasImage>true</hasImage>
        <hasDescription>true</hasDescription>
        <hasRejectAction>true</hasRejectAction>
        <hasTitle>true</hasTitle>
    </recommendation>
    <deploymentContexts>
        <entityName>Case</entityName>
        <recommendationStrategy>Sample_Case_Strategy</recommendationStrategy>
    </deploymentContexts>
    <deploymentContexts>
        <entityName>Account</entityName>
        <recommendationStrategy>Sample_Acc_Strategy</recommendationStrategy>
    </deploymentContexts>
</RecordActionDeployment>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <fullName>SecondTest</fullName>
```

```
    <types>
        <members>Sample_Flow</members>
        <members>Another_Sample_Flow</members>
        <members>Sample_Flow_2</members>
        <name>Flow</name>
    </types>
    <types>
        <members>SampleDeployment</members>
        <name>RecordActionDeployment</name>
    </types>
    <version>45.0</version>
</Package>
```

CHAPTER 12 Business Rules Engine

In this chapter ...

- Expression Set
- Decision Table
- Decision Explainer for Expression Set
- Lookup Tables

Business Rules Engine is a suite of services, components, and objects that can be used to create business rules that perform complex lookups and calculations. The key components of Business Rules Engine are expression sets, decision matrices, and decision tables.

SEE ALSO:

Salesforce Help: Permission Sets for Business Rules Engine

EDITIONS

Available in: Lightning Experience

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

Expression Set

Expression sets consist of a series of steps connected in a logical flow built from variables, constants, conditions, calculations, lookups, and aggregations.

Expression Set Standard Objects
Use standard objects to create, update, and activate Expression Set components.

Expression Set Business APIs
Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

Expression Set Invocable Actions
Use actions to invoke Expression Set actions in a flow.

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

Expression Set 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.

SEE ALSO:
Salesforce Help: Expression Sets

Expression Set Standard Objects

Use standard objects to create, update, and activate Expression Set components.

EDITIONS

Available in: Lightning Experience

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

ExpressionSet
Represents information about an expression set. An expression set performs a series of calculations using lookups and user-defined variables and constants. This object is available in API version 55.0 and later.

ExpressionSetDefinitionContextDefinition
Represents a relationship between an expression set definition and a context definition. This object is available in API version 58.0 and later.

ExpressionSetVersion
Represents information about a specific version of an expression set. This object is available in API version 55.0 and later.

ExpressionSetView
Represents a virtual object that provides a consolidated view of file-based expression set. File-based expression sets are read-only templates. To be able to modify file-based expression sets, you must clone them first. This object is available in API version 55.0 and later.

ExpsSetObjectAliasFieldVw
Represents the virtual object that provides a consolidated view of source object and its alias, and the source object fields and their aliases that are used in an expression set. This object is used to check the permission level required to access the underlying object fields associated with their field aliases. This object is available in API version 56.0 and later.

ExpressionSet

Represents information about an expression set. An expression set performs a series of calculations using lookups and user-defined variables and constants. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`ApiName`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The API name of the expression set. This field is unique within your organization. This is a required field.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the expression set.
`ExecutionScale`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the scale of the input that an expression set processes. The scale determines where the expression set is executed. Possible values are: • `High` • `Low`
`ExpressionSetDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The expression set definition record associated with this expression set. This is a required field. This is a relationship field. **Relationship Name** ExpressionSetDefinition **Relationship Type** Lookup **Refers To** ExpressionSetDefinition
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, it's possible the user only accessed this record or list view (LastReferencedDate) but didn't view it.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the expression set. This is a required field.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who currently owns this expression set. Default value is the user logged in to the API to perform the create action

Field	Details
	This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`UsageType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of industry that's using the expression set. Possible values are: • `Bre` Note: When Business Rules Engine is enabled for a Salesforce instance, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets.

ExpressionSetDefinitionContextDefinition

Represents a relationship between an expression set definition and a context definition. This object is available in API version 58.0 and later.

Note: You can't add records to this object.

Fields

Field	Details
`ContextDefinitionApiName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** API name of the context definition.
`ContextDefinitionId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** ID of the context definition. This field is a relationship field. **Relationship Name** ContextDefinition **Relationship Type** Lookup **Refers To** ContextDefinition
`ExecutableContextDefinition`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort **Description** Developer name of the file-based context definition.
`ExpressionSetApiName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** API name of the expression set.
`ExpressionSetDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the expression set definition. This field is a relationship field. **Relationship Name** ExpressionSetDefinition **Relationship Type** Lookup **Refers To** ExpressionSetDefinition

ExpressionSetVersion

Represents information about a specific version of an expression set. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`ApiName`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The API name of the expression set version. This is a required field and it requires a unique value.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the expression set version,
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the expression set version becomes inactive.
`ExpressionSetDefinitionVerId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The expression set definition version associated with this expression set version. This is a required field. This is a relationship field. **Relationship Name** ExpressionSetDefinitionVer

Field	Details
	Relationship Type Lookup **Refers To** ExpressionSetDefinitionVersion
`ExpressionSetId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the parent expression set record that's associated with this expression set version. This is a required field. This is a relationship field. **Relationship Name** ExpressionSet **Relationship Type** Lookup **Refers To** ExpressionSet
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the expression set version is active (`true`) or not (`false`). This is a required field. The default value is `false`.
`IsLoopingEnabled`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether looping is active for this expression set version (`true`) or not (`false`). The default value is `false`.
`LatestSimulationResult`	**Type** textarea **Properties** Create, Nillable, Update

Field	Details
	Description The result of the simulation service that processes the input variables defined for the expression set version, in JSON format.
`LoopEndVariableName`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the resource that's used to determine which resource can be processed last in the loop.
`LoopIncrementVariableName`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the variable that's used to determine which resource can be processed next in the loop.
`LoopStartVariableName`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the variable that's processed when the loop starts.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the expression set version. This is a required field.
`Rank`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The rank of the expression set version. An expression set version's rank is used to determine when the version is chosen for processing. When more than one enabled version matches

Field	Details
	an expression set call, and the start and end date time periods overlap, the version with the highest rank is chosen.
`ShouldShowExplExternally`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the decision explanation is exposed to external users (true) or not (false). The default value for this field is `false`. This field is available in API version 56.0 and later.
`StartDateTime`	**Type** dateTime **Properties** Create, Defaulted on create, Filter, Nillable, Sort, Update **Description** The date and time when the expression set version becomes active.
`VersionNumber`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The version number of this expression set. This is a required 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

ExpressionSetVersionFeed
Feed tracking is available for the object.

ExpressionSetVersionHistory
History is available for tracked fields of the object.

ExpressionSetView

Represents a virtual object that provides a consolidated view of file-based expression set. File-based expression sets are read-only templates. To be able to modify file-based expression sets, you must clone them first. This object is available in API version 55.0 and later.

Supported Calls

`describeSObjects(), query()`

Fields

Field	Details
`Description`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The description of an expression set.
`DurableId`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The ID of the expression set.
`ExpressionSetDetails`	**Type** textarea **Properties** Nillable **Description** The details of the expression set in JSON format, which includes information such as name, version, created date, and elements contained in the expression set.
`HasContextDefinitionRef`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the executable expression set template references an executable context definition (`true`) or not (`false`). The default value is False. Available in API version 60.0 and later. The default value is `false`.
`IsExecutable`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort

Field	Details
	Description Indicates whether the expression set template is executable (`true`) or not (`false`). Available in API version 60.0 and later. The default value is `false`.
`IsTemplate`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the expression set is a template (`true`) or not (`false`). When installed from managed packages, expression sets can't be viewed or cloned by subscribers because of intellectual property (IP) protection. But when those expression sets are templates, subscribers can open them in a builder, clone them, and customize the clones. The default value is `false`.
`LastModifiedBy`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the user that last updated the expression set view.
`Name`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the file-based or database expression set.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org 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.

Field	Details
	• In Developer Edition orgs, `NamespacePrefix` is set to the namespace prefix of the org for all objects that support it, unless 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 org of the package developer. • In orgs that aren't Developer Edition orgs, `NamespacePrefix` is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
`UsageType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of industry or the application within the industry that's using the template. Available in API version 60.0 and later. Possible value is: • Bre—Business Rules Engine When Business Rules Engine is enabled for a Salesforce instance, the default value is `Bre`. Other usage types may be available to you depending on your industry solution and permission sets.
`UsageTypeLabel`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Specifies the label of the usage type that's associated with an expression set template

Usage

Use expression set templates as reference to build your own expression sets. Expression set templates are read-only files that contain rules that can run end-to-end. Save a template as an expression set to use it as-is, or modify the expression set for your business requirement.

ExpsSetObjectAliasFieldVw

Represents the virtual object that provides a consolidated view of source object and its alias, and the source object fields and their aliases that are used in an expression set. This object is used to check the permission level required to access the underlying object fields associated with their field aliases. This object is available in API version 56.0 and later.

Supported Calls

`describeSObjects(), query()`

Special Access Rules

To view this object, users need access to the source object, the usage type, and the field level security associated with the object field aliases in the object.

Fields

Field	Details
`DurableId`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier for the field. Always retrieve this value before using it, as the value isn't guaranteed to stay the same from one release to the next. Simplify queries by using this field instead of making multiple queries.
`ExpsSetDefVerVarField`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Identifies the variable to which this field belongs. This is a required field.
`FieldAlias`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The alias associated with the object field that's used in the expression set. The field alias can be up to 30 characters in length. This is a required field.
`InstalledPackageName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the package used to add the record to the org. This is a required field.

Field	Details
`LastModifiedBy`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The unique identifier of the user who modified the alias last. This is a required field.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. This is a required field. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org 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. This is a required field. The namespace prefix can have one of the following values. • In Developer Edition orgs, `NamespacePrefix` is set to the namespace prefix of the org for all objects that support it, unless 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 org of the package developer.

Field	Details
	• In orgs that are not Developer Edition orgs, `NamespacePrefix` is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
`ObjectAlias`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The alias that corresponds to the source object whose fields are used in an expression set. In the context of an expression set, this alias is a group that contains the aliases for fields from the source object. This is a required field.
`ObjectApiName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The API name of the source object associated with the object field aliases that are used in an expression set.
`SourceFieldDataType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The data type of the source object for which the object alias is defined. This is a required field. Possible values are: • `ActionOutput` • `Boolean` • `Currency` • `Date` • `DateTime` • `DecisionMatrix` • `DecisionTable` • `Numeric` • `Percent` • `Sobject` • `SubExpression` • `Text`

Field	Details
	The default value is `Text`.
`SourceFieldDecimalScale`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The number of decimal places applied to the value in the source field that's of the type Currency, Percent, or Number.
`SourceFieldName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the source object field associated with a field alias that's used in an expression set. This is a required field.
`UsageType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of application associated with the industry that's using an expression set. Possible values are: • `Bre`–Default When Business Rules Engine is enabled for a Salesforce org, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets.

Expression Set Business APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

The runtime service for Expression Set is exposed through Connect APIs.

With Expression Set Connect APIs, you can:

- Invoke an expression set.
- Create an expression set.

Resources

Expression Set API includes these resources.

Request Bodies
Expression Set API includes these request bodies.

Response Bodies
Expression Set API includes these response bodies.

Resources

Expression Set API includes these resources.

Expression Set (POST)
Creates an expression set in Business Rules Engine. An expression set performs a series of calculations by using lookup tables and user-defined variables and constants.

Expression Set (DELETE, GET)
Input representation to read and delete expression set.

Expression Set (PATCH)
Endpoints to read, and update expression set.

Expression Set Invocation (POST)
Invokes expression sets in Business Rule Engine.

Expression Set Version Dependencies (GET)
Retrieve expression set version dependencies.

Guardrails (GET)
Fetches guardrails from the Business Rules Engine (BRE) to manage rate limits for BRE components.

Expression Set (POST)

Creates an expression set in Business Rules Engine. An expression set performs a series of calculations by using lookup tables and user-defined variables and constants.

Resource

```
/connect/business-rules/expression-set
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect
/business-rules/expression-set
```

Available version
58.0

Requires Chatter
No

HTTP methods
POST

Request body for POST

Root XML tag

```
<ExpressionSetInput>
```

JSON example

```
{
  "name": "CTX Mapping ES",
  "apiName": "CTX_Mapping_ES_1",
  "description": "...",
  "usageType": "Bre",
  "contextDefinitions": [
    {
      "id": "11Oxx0000006PcLEAU"
    }
  ],
  "versions": [
    {
      "name": "CTX_Mapping_ES_1 V1",
      "apiName": "CTX_Mapping_ES_1_V1",
      "description": "Sample CTX Mapping",
      "startDate": "2022-11-14T20:31:47.000+0000",
      "endDate": "2022-11-14T20:31:47.000+0000",
      "versionNumber": 1,
      "rank": 1,
      "enabled": true,
      "showExplExternally": false,
      "steps": [
        {
          "name": "Condition1",
          "description": "Condition step for conditions w.r.t product",
          "sequenceNumber": 1,
          "resultIncluded": true,
          "stepType": "Condition",
          "conditionExpression": {
            "expression": "productName == 'iPhone' && productColor == 'Red'",
            "resultParameter": "condition_output__1"
          }
        }
      ],
      "variables": [
        {
          "name": "productName",
          "collection": false,
          "dataType": "Text",
          "description": "productName",
          "input": true,
          "output": false,
          "type": "Variable"
        },
        {
          "name": "productColor",
          "collection": false,
          "dataType": "Text",
          "description": "productColor",
          "input": true,
          "output": false,
          "type": "Variable"
```

```
        },
        {
          "name": "condition_output__1",
          "dataType": "Boolean",
          "description": "condition_output__1",
          "input": false,
          "output": true,
          "resultStep": "Condition1",
          "type": "Variable"
        }
      ]
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`apiName`	String	Unique name of the expression set.	Required	58.0
`contextDefinitions`	Context Definition Input	List of context definitions in an expression set.	Optional	58.0
`description`	String	Description of the expression set.	Optional	58.0
`name`	String	Name of the expression set.	Required	58.0
`usageType`	String	Usage type of the expression set. Valid value is `Bre`. The default value is `Bre`. When Business Rules Engine is enabled for a Salesforce org, the default value is `Bre`. Other usage types may be available to you depending on your industry solution and permission sets.	Required	58.0
`versions`	Expression Set Version Input[]	List of the expression set versions.	Optional	58.0

Response body for POST

Expression Set Output

Expression Set (DELETE, GET)

Input representation to read and delete expression set.

Resource

```
/connect/business-rules/expression-set/${expressionSetId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect
            /business-rules/expressionSet/$11Oxx0000006PcLEAU
```

Available version

58.0

Requires Chatter

No

HTTP methods

DELETE, GET

Response body for GET

Expression Set Output

Response body for DELETE

None.

Expression Set (PATCH)

Endpoints to read, and update expression set.

Resource

```
/connect/business-rules/expression-set/${expressionSetId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect
            /business-rules/expressionSet/$11Oxx0000006PcLEAU
```

Available version

58.0

Requires Chatter

No

HTTP methods

PATCH

Request body for PATCH

Root XML tag

```
<ExpressionSetInput>
```

JSON example

```
{
  "name": "CTX Mapping ES",
  "apiName": "CTX_Mapping_ES_1",
  "description": "...",
  "usageType": "Bre",
  "contextDefinitions": [
    {
      "id": "11Oxx0000006PcLEAU"
    }
  ],
```

```
"versions": [
  {
    "name": "CTX_Mapping_ES_1 V1",
    "apiName": "CTX_Mapping_ES_1_V1",
    "description": "Sample CTX Mapping",
    "startDate": "2022-11-14T20:31:47.000+0000",
    "endDate": "2022-11-14T20:31:47.000+0000",
    "versionNumber": 1,
    "rank": 1,
    "enabled": true,
    "showExplExternally": false,
    "steps": [
      {
        "name": "Condition1",
        "description": "Condition step for conditions w.r.t product",
        "sequenceNumber": 1,
        "resultIncluded": true,
        "stepType": "Condition",
        "conditionExpression": {
          "expression": "productName == 'iPhone' && productColor == 'Red'",
          "resultParameter": "condition_output__1"
        }
      }
    ],
    "variables": [
      {
        "name": "productName",
        "collection": false,
        "dataType": "Text",
        "description": "productName",
        "input": true,
        "output": false,
        "type": "Variable"
      },
      {
        "name": "productColor",
        "collection": false,
        "dataType": "Text",
        "description": "productColor",
        "input": true,
        "output": false,
        "type": "Variable"
      },
      {
        "name": "condition_output__1",
        "dataType": "Boolean",
        "description": "condition_output__1",
        "input": false,
        "output": true,
        "resultStep": "Condition1",
        "type": "Variable"
      }
    ]
  }
```

```
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`apiName`	String	Unique name of the expression set.	Required	58.0
`contextDefinitions`	Context Definition Input	List of context definitions in an expression set.	Optional	58.0
`description`	String	Description of the expression set.	Optional	58.0
`name`	String	Name of the expression set.	Required	58.0
`usageType`	String	Usage type of the expression set. Valid value is `Bre`. The default value is `Bre`. When Business Rules Engine is enabled for a Salesforce org, the default value is `Bre`. Other usage types may be available to you depending on your industry solution and permission sets.	Required	58.0
`versions`	Expression Set Version Input[]	List of the expression set versions.	Optional	58.0

Response body for PATCH

Expression Set Output

Expression Set Invocation (POST)

Invokes expression sets in Business Rule Engine.

Resource

```
/connect/business-rules/expressionSet/${expressionSetName}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/business-rules/expressionSet/${expressionSetName}
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example 1

```
{
  "inputs": [
    {
      "age": "25",
      "state": "CA",
      "PatientId":"001xx000003GYjnAAG"
    }
  ],
  "options": {
    "effectiveDate": "2022-12-03T10:15:30Z",
    "useDatesOnly": "true"
  }
}
```

JSON example 2

```
{
  "inputs": [
    {
      "age": "25",
      "state": "CA",
      "PatientId":"001xx000003GYjnAAG",
      "__actionContextCode":"001xx000003GYjnAAG"
    }
  ],
  "options": {
    "effectiveDate": "2022-12-03T10:15:30Z",
    "useDatesOnly": "true"
  }
}
```

Note: You can use more than one `actionContextCode` for multiple sets of inputs, passed in a single API call.

Properties

Name	Type	Description	Required or Optional	Available Version
`inputs`	Map<String, Object>[]	List of inputs passed to an expression set. An input may contain multiple variables. Note: If the expression set uses a field alias as a variable, append Id to the object alias to which the field alias belongs, and pass the ID of the source object linked to the object alias.	Required	55.0
`options`	Expression Set Options Input	The options for executing an expression set.	Optional	55.0

Response body for POST

Business Rules Result

Expression Set Version Dependencies (GET)

Retrieve expression set version dependencies.

Resource

```
/connect/business-rules/expression-set/version/${expressionSetVersionId}/dependencies
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v58.0/connect/business-rules/expression-set/version/9QARN000000016v4AA/dependencies
```

Available version

58.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Expression Set Version Dependency

Guardrails (GET)

Fetches guardrails from the Business Rules Engine (BRE) to manage rate limits for BRE components.

Resource

```
/connect/business-rules/guardrails
```

Example POST

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/guardrails
```

Available version

63.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`componentNames`	String	BRE component to fetch the guardrails. It contains a comma-separated list of predefined components. Valid component values are: • `ExpressionSet` • `DecisionTable`	Optional	63.0

Parameter Name	Type	Description	Required or Optional	Available Version
		• `DecisionMatrix` • `Explainability` • `DynamicRules` If no values are provided, guardrails for all components accessible to the user are returned.		
`isNotificationEnabled`	Boolean	Indicates whether to return only the guardrails with enabled notifications (`true`) or not (`false`).	Optional	63.0

Response body for GET

BRE Guardrails

Request Bodies

Expression Set API includes these request bodies.

Business Rules Input
Input representation of an expression set.

Context Definition Input
Input representation of the context definitions in an expression set.

Expression Set Advanced Condition Step Input
Input representation of an advanced condition step in an expression set.

Expression Set Aggregation Step Input
Input representation of an aggregation step in an expression set.

Expression Set Assignment Step Input
Input representation of an assignment step in an expression set.

Expression Set Condition Criteria Input
Input representation of a condition criteria in an expression set.

Expression Set Condition Expression Step
Input representation of an expression set condition step.

Expression Set Custom Element Parameter Input
Input representation of a custom element parameter in an expression set.

Expression Set Custom Element Step Input
Input representation of a custom element step in an expression set.

Expression Set DES Token Mapping Input
Input representation of the DES token mapping in an expression set version step.

Expression Set Input
Input representation of the expression set create and update request.

Expression Set Lookup Table Step Input
Input representation of a lookup table step in an expression set.

Expression Set Options Input
Input representation of the options for executing an expression set.

Expression Set SubExpression Step Input
Input representation of a subexpression step in an expression set.

Expression Set Version Input
Input representation of an expression set version.

Expression Set Version Step Input
Input representation of a step in an expression set version.

Expression Set Version Variable Input
Input representation of a variable in an expression set version.

Business Rules Input

Input representation of an expression set.

JSON example 1

```
{
  "inputs": [
    {
      "age": "25",
      "state": "CA",
      "PatientId":"001xx000003GYjnAAG"
    }
  ],
  "options": {
    "effectiveDate": "2022-12-03T10:15:30Z",
    "useDatesOnly": "true"
  }
}
```

JSON example 2

```
{
  "inputs": [
    {
      "age": "25",
      "state": "CA",
      "PatientId":"001xx000003GYjnAAG",
      "__actionContextCode":"001xx000003GYjnAAG"
    }
  ],
  "options": {
    "effectiveDate": "2022-12-03T10:15:30Z",
    "useDatesOnly": "true"
  }
}
```

Note: You can use more than one `actionContextCode` for multiple sets of inputs, passed in a single API call.

Properties

Name	Type	Description	Required or Optional	Available Version
`inputs`	Map<String, Object>[]	List of inputs passed to an expression set. An input may contain multiple variables. Note: If the expression set uses a field alias as a variable, append Id to the object alias to which the field alias belongs, and pass the ID of the source object linked to the object alias.	Required	55.0
`options`	Expression Set Options Input	The options for executing an expression set.	Optional	55.0

Context Definition Input

Input representation of the context definitions in an expression set.

Root XML tag

```
<ContextDefinitionInput>
```

JSON example

```
"contextDefinitionList": {
    "contextDefinitions":[{
    "id":"11Oxx0000006PcLEAU"
    }]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`id`	String	ID of the context definition.	Required	58.0
`name`	String	Developer name of the context definition.	Optional	58.0

Expression Set Advanced Condition Step Input

Input representation of an advanced condition step in an expression set.

Root XML tag

```
<ExpressionSetAdvancedConditionStepInput>
```

JSON example

```
"advancedCondition" : {
            "conditionLogic" : "1",
```

```
            "criteria" : [ {
              "operator" : "Equals",
              "sequenceNumber" : 1,
              "sourceFieldName" : "a",
              "value" : "0",
              "valueType" : "Literal"
            } ],
          "resultParameter" : "condition_output__1"
        }
```

Properties

Name	Type	Description	Required or Optional	Available Version
`conditionLogic`	String	Condition that's defined for the advanced condition. For example, if all conditions are met or any of the conditions are met.	Required	58.0
`criteria`	Expression Set Condition Criteria Input[]	List of condition criteria in an expression set.	Required	58.0
`resultParameter`	String	Expression set definition version variable associated with the result of the step.	Required	58.0

Expression Set Aggregation Step Input

Input representation of an aggregation step in an expression set.

Root XML tag

```
<ExpressionSetAggregationStepInput>
```

JSON example

```
"aggregation" : {
"aggergatedParameter" : "v1",
"aggregateFunction" : "Sum",
"expression" : "SUM ( v2 )"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`aggergatedParameter`	String	Expression set version variable that's present on the right side of the aggregation step.	Required	58.0
`aggregateFunction`	String	Aggregation function of the expression set. Valid values are: • `Avg`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		• `Max` • `Min` • `Sum`		
`expression`	String	Expression that's present on the left side of the aggregation step.	Required	58.0

Expression Set Assignment Step Input

Input representation of an assignment step in an expression set.

Root XML tag

```
<ExpressionSetAssignmentStepInput>
```

JSON example

```
"assignment" : {
            "assignedParameter" : "b",
            "expression" : "100"
          }
```

Properties

Name	Type	Description	Required or Optional	Available Version
`assigned Parameter`	String	Expression set version variable that's present on the right side of the calculation step.	Required	58.0
`expression`	String	Expression that's present on the left side of the calculation step.	Required	58.0

Expression Set Condition Criteria Input

Input representation of a condition criteria in an expression set.

Root XML tag

```
<ExpressionSetConditionCriteriaInput>
```

JSON example

```
"criteria" : [ {
                "operator" : "Equals",
                "sequenceNumber" : 1,
                "sourceFieldName" : "a",
                "value" : "0",
                "valueType" : "Literal"
              } ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
`operator`	String	Condition operator of the expression set. Valid values are: • `Contains` • `DoesNotContain` • `Equals` • `GreaterThanOrEquals` • `GreaterThan` • `IsNotNull` • `IsNull` • `LessThan` • `LessThanOrEquals` • `NotEqualTo`	Required	58.0
`sequenceNumber`	Integer	The sequence number of the condition in the advanced condition.	Required	58.0
`sourceFieldName`	String	The expression set version variable associated with the condition criteria.	Required	58.0
`value`	String	The right-hand side of the condition is specified in this field.	Required	58.0
`valueType`	String	Criteria value type of the expression set. Valid values are: • `Formula` • `Literal` • `Parameter`	Required	58.0

Expression Set Condition Expression Step

Input representation of an expression set condition step.

Root XML tag

```
<ExpressionSetConditionExpressionStepInput>
```

JSON example

```
"conditionExpression": {
                "expression": "productName == 'iPhone' && City == 'Los Angeles'",
                "resultParameter": "condition_output__1"
              }
```

Properties

Name	Type	Description	Required or Optional	Available Version
`expression`	String	Expression that's defined for the step.	Required	58.0
`result Parameter`	String	Expression set version variable associated with the result of the step.	Required	58.0

Expression Set Custom Element Parameter Input

Input representation of a custom element parameter in an expression set.

Root XML tag

```
<ExpressionSetCustomElementParameterInput>
```

JSON example

```
"parameters": [
              {
                "input": true,
                "name": "Divisor",
                "output": false,
                "value": "v1",
                "type": "Parameter"
              },
              {
                "input": true,
                "name": "Dividend",
                "output": false,
                "value": "v2",
                "type": "Parameter"
              },
              {
                "input": false,
                "name": "Answer",
                "output": true,
                "value": "v3",
                "type": "Parameter"
              }
            ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
`input`	Boolean	Indicates whether the custom element parameter is an input parameter (`true`) or not (`false`).	Required	58.0
`name`	String	Name of the custom element parameter.	Required	58.0

Name	Type	Description	Required or Optional	Available Version
`output`	Boolean	Indicates whether the custom element parameter is an output parameter (`true`) or not (`false`).	Required	58.0
`type`	String	Type of custom element parameter. Valid values are: • `Formula` • `Literal` • `Lookup` • `Parameter` • `Picklist` The default value is `Parameter`.	Optional	58.0
`value`	String	Name of the expression set variable.	Required	58.0

Expression Set Custom Element Step Input

Input representation of a custom element step in an expression set.

Root XML tag

```
<ExpressionSetCustomElementStepInput>
```

JSON example

```
"customElement": {
          "parameters": [
            {
              "input": true,
              "name": "Divisor",
              "output": false,
              "value": "v1"
            },
            {
              "input": true,
              "name": "Dividend",
              "output": false,
              "value": "v2"
            },
            {
              "input": false,
              "name": "Answer",
              "output": true,
              "value": "v3"
            }
          ]
        },
```

Properties

Name	Type	Description	Required or Optional	Available Version
parameters	Expression Set Custom Element Parameter Input[]	List of parameters in a custom element.	Required	58.0

Expression Set DES Token Mapping Input

Input representation of the DES token mapping in an expression set version step.

Root XML tag

```
<ExpressionSetDesTokenMappingInput>
```

JSON example

```
"passedMessageTokenMappings": [
{
"expressionSetMessageToken": "price",
"resourceReference": "DM1__Price"
}
],
"failedMessageTokenMappings": [
{
"expressionSetMessageToken": "model",
"resourceReference": "Model"
}
],

"noResultMessageTokenMappings": [
{
"expressionSetMessageToken": "year",
"resourceReference": "Year"
}
]
```

Properties

Name	Type	Description	Required or Optional	Available Version
resourceReference	String	Name of the expression set resource that's mapped to a token, such as Variable, Constant, or FiledAlias.	Required	59.0
expressionSetMessageToken	String	Name of the explainability message template token.	Required	59.0

Expression Set Input

Input representation of the expression set create and update request.

Root XML tag

```
<ExpressionSetInput>
```

JSON example

```
{
  "name": "CTX Mapping ES",
  "apiName": "CTX_Mapping_ES_1",
  "description": "...",
  "usageType": "Bre",
  "contextDefinitions": [
    {
      "id": "11Oxx0000006PcLEAU"
    }
  ],
  "versions": [
    {
      "name": "CTX_Mapping_ES_1 V1",
      "apiName": "CTX_Mapping_ES_1_V1",
      "description": "Sample CTX Mapping",
      "startDate": "2022-11-14T20:31:47.000+0000",
      "endDate": "2022-11-14T20:31:47.000+0000",
      "versionNumber": 1,
      "rank": 1,
      "enabled": true,
      "showExplExternally": false,
      "steps": [
        {
          "name": "Condition1",
          "description": "Condition step for conditions w.r.t product",
          "sequenceNumber": 1,
          "resultIncluded": true,
          "stepType": "Condition",
          "conditionExpression": {
            "expression": "productName == 'iPhone' && productColor == 'Red'",
            "resultParameter": "condition_output__1"
          }
        }
      ],
      "variables": [
        {
          "name": "productName",
          "collection": false,
          "dataType": "Text",
          "description": "productName",
          "input": true,
          "output": false,
          "type": "Variable"
        },
        {
          "name": "productColor",
          "collection": false,
          "dataType": "Text",
          "description": "productColor",
          "input": true,
```

```
          "output": false,
          "type": "Variable"
        },
        {
          "name": "condition_output__1",
          "dataType": "Boolean",
          "description": "condition_output__1",
          "input": false,
          "output": true,
          "resultStep": "Condition1",
          "type": "Variable"
        }
      ]
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`apiName`	String	Unique name of the expression set.	Required	58.0
`contextDefinitions`	Context Definition Input	List of context definitions in an expression set.	Optional	58.0
`description`	String	Description of the expression set.	Optional	58.0
`name`	String	Name of the expression set.	Required	58.0
`usageType`	String	Usage type of the expression set. Valid value is `Bre`. The default value is `Bre`. When Business Rules Engine is enabled for a Salesforce org, the default value is `Bre`. Other usage types may be available to you depending on your industry solution and permission sets.	Required	58.0
`versions`	Expression Set Version Input[]	List of the expression set versions.	Optional	58.0

Expression Set Lookup Table Step Input

Input representation of a lookup table step in an expression set.

Root XML tag

`<ExpressionSetLookupTableStepInput>`

JSON example

```
            "lookupTable": {
```

```
                "lookupTableName": "DM_for_test",
                "type": "DecisionMatrix"
            }
```

Properties

Name	Type	Description	Required or Optional	Available Version
`lookupTableName`	String	Decision matrix or decision table name that's used in the lookup table step.	Required	58.0
`type`	String	Lookup table type of the expression set. Valid values are: • `DecisionMatrix` • `DecisionTable`	Required	58.0

Expression Set Options Input

Input representation of the options for executing an expression set.

Properties

Name	Type	Description	Required or Optional	Available Version
`actionContextCode`	String	The code of the action context used to log explainability for a specific execution of an expression set. Note: To exclude decision explanations for expression set version steps from action logs, ensure that you exclude the `actionContextCode` and `explainabilitySpecName` properties from the payload.	Optional	55.0
`effectiveDate`	String	The date from which an expression set comes into effect. The date format is yyyy-mm-dd'T'hh:mm:ss'Z. Note: Multiple versions of an expression set can exist with different date ranges. For example, Version 1 is effective before December 2019, and Version 2 is effective from January 2020 to the present. If you specify `effectiveDate` as "2019-03-15T00:00:00Z", Version 1	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		is executed. If you do not specify `effectiveDate`, the currently active version, Version 2, is executed.		
`explainabilitySpecName`	String	The name of the explainability specification that is used to log explainability for a specific execution of an expression set. Note: To exclude decision explanations for expression set version steps from action logs, ensure that you exclude the `actionContextCode` and `explainabilitySpecName` properties from the payload.	Optional	55.0
`useDatesOnly`	String	Specifies that only the date portion (yyyy-mm-dd) of the value of effectiveDate field is to be used at the time of execution.	Optional	55.0
`versionNumber`	String	The version number of the expression set version record.	Optional	55.0

Expression Set SubExpression Step Input

Input representation of a subexpression step in an expression set.

Root XML tag

```
<ExpressionSetSubExpressionStepInput>
```

JSON example

```
"subExpression": {
  "expressionSet": "EPC_ExpressionSet_NoVersions"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`expressionSet`	String	Expression set name that's used in the subexpression set step.	Required	58.0

Expression Set Version Input

Input representation of an expression set version.

Root XML tag

```
<ExpressionSetVersionInput>
```

JSON example


```
"versions": [
    {
      "description": null,
      "endDate": "2023-03-29T13:08:36.000+0000",
      "name": "ExpressionSet DM V1",
      "apiName": "ExpressionSet_DM_V1",
      "showExplExternally": false,
      "startDate": "2023-02-16T13:08:36.000+0000",
      "enabled": false,
      "steps": [
        {
          "actionType": null,
          "advancedCondition": null,
          "aggregation": null,
          "assignment": null,
          "conditionExpression": {
            "expression": "productName == 'iPhone' && City == 'Los Angeles",
            "resultParameter": "condition_output__1"
          },
          "customElement": null,
          "lookupTable": null,
          "description": "Condition step for conditions w.r.t product",
          "failedExplainerTemplate": null,
          "name": "Condition1",
          "parentStep": null,
          "passedExplainerTemplate": null,
          "resultIncluded": true,
          "sequenceNumber": 1,
          "shouldExposeExecPathMsgOnly": false,
          "shouldExposeConditionDetails": false,
          "shouldShowExplExternally": false,
          "stepType": "Condition",
          "subExpression": null
        },
        {
          "actionType": "GetOutputsFromDecisionMatrix",
          "advancedCondition": null,
          "aggregation": null,
          "assignment": null,
          "conditionExpression": null,
          "customElement": null,
          "lookupTable": {
            "lookupTableName": "DM_for_test",
            "type": "DecisionMatrix"
          },
          "description": null,
          "failedExplainerTemplate": null,
          "name": "DM_for_test",
          "parentStep": null,
          "passedExplainerTemplate": null,
```

```
        "resultIncluded": true,
        "sequenceNumber": 2,
        "shouldExposeExecPathMsgOnly": true,
        "shouldExposeConditionDetails": false,
        "shouldShowExplExternally": false,
        "stepType": "BusinessKnowledgeModel",
        "subExpression": null
      }
    ],
    "variables": [
      {
        "collection": false,
        "dataType": "Text",
        "decimalPlaces": 2,
        "description": null,
        "input": true,
        "lookupName": "DM_for_test",
        "lookupType": "DecisionMatrix",
        "name": "City",
        "objectName": null,
        "output": false,
        "resultStep": null,
        "type": "Variable",
        "value": null
      },
      {
        "collection": false,
        "dataType": "Text",
        "decimalPlaces": null,
        "description": null,
        "input": false,
        "lookupName": "DM_for_test",
        "lookupType": "DecisionMatrix",
        "name": "DM_for_test__State",
        "objectName": null,
        "output": true,
        "resultStep": null,
        "type": "Variable",
        "value": null
      },
      {
        "collection": false,
        "dataType": "Text",
        "decimalPlaces": null,
        "description": "productName",
        "input": true,
        "lookupName": null,
        "lookupType": null,
        "name": "productName",
        "objectName": null,
        "output": false,
        "resultStep": null,
        "type": "Variable",
        "value": null
```

```
        },
        {
          "collection": false,
          "dataType": "Boolean",
          "decimalPlaces": null,
          "description": "condition_output__1",
          "input": false,
          "lookupName": null,
          "lookupType": null,
          "name": "condition_output__1",
          "objectName": null,
          "output": true,
          "resultStep": "Condition1",
          "type": "Variable",
          "value": null
        }
      ],
      "versionNumber": 1
    }
  ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
`apiName`	String	API name of the version.	Required	58.0
`description`	String	Description of the version.	Optional	58.0
`enabled`	Boolean	Indicates whether the version is active (`true`) or inactive (`false`).	Required	58.0
`endDate`	String	Effective end date of the version.	Required	58.0
`id`	String	ID of expression set version.	Optional	58.0
`name`	String	Name of the version.	Required	58.0
`rank`	Integer	Rank of the version.	Optional	58.0
`showExplExternally`	Boolean	Indicates whether the decision explanation is exposed to community users (`true`) or not (`false`).	Required	58.0
`startDate`	String	Effective start date of the version.	Required	58.0
`steps`	Expression Set Version Step Input[]	List of steps in an expression set.	Optional	58.0
`variables`	Expression Set Version Variable Input[]	List of variables in an expression set.	Optional	58.0
`versionNumber`	Integer	Version number of the expression set version.	Required	58.0

Expression Set Version Step Input

Input representation of a step in an expression set version.

Root XML tag

```
<ExpressionSetVersionStepInput>
```

JSON example

```
"steps": [
            {
              "actionType": null,
              "advancedCondition": null,
              "aggregation": null,
              "assignment": null,
              "conditionExpression": {
                "expression": "productName == 'iPhone' && City == 'Los Angeles'",
                "resultParameter": "condition_output__1"
              },
              "customElement": null,
              "lookupTable": null,
              "description": "Condition step for conditions w.r.t product",
              "failedExplainerTemplate": "FailureTemplate",
              "failedMessageTokenMappings": [
              {
              "expressionSetMessageToken": "model",
              "resourceReference": "Model"
              }],
              "name": "Condition1",
              "noResultExplainerTemplate": "NoResultTemplate",
              "noResultMessageTokenMappings": [
              {
              "expressionSetMessageToken": "year",
              "resourceReference": "Year"
              }],
              "parentStep": null,
              "passedExplainerTemplate": "SuccessTemplate",
              "passedMessageTokenMappings": [
              {
              "expressionSetMessageToken": "price",
              "resourceReference": "DM1__Price"
              }],
              "resultIncluded": true,
              "sequenceNumber": 1,
              "shouldExposeExecPathMsgOnly": false,
              "shouldExposeConditionDetails": false,
              "shouldShowExplExternally": false,
              "stepType": "Condition",
              "subExpression": null
            }
          ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
`actionType`	String	Business Knowledge Model of the expression set. Valid values are: • `AiAccelerator SubscriberChurn Prediction` • `AssignBadgeToMember` • `AssignParameterValues` • `AutomatedClaims ProcessingValidation` • `BreAggregator` • `BreAggregatorAssignment` • `ChangeMemberTier` • `CheckMember BadgeAssignment` • `CreditPoints` • `Crud` • `DebitPoints` • `EvaluateQualification` • `EvaluateDisqualification` • `GetMemberAttributes Values` • `GetMemberPointBalance` • `GetMemberPromotions` • `GetMemberTier` • `GetOutputsFromDecision Matrix` • `GetOutputsFromDecision Table` • `GetUserData` • `IncreaseUsage ForCumulativePromotion` • `IssueVoucher` • `ListGroupCalculation` • `PriceAdjustmentMatrix` • `PriceList` • `RecordAlert`	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
		• `RedeemVoucher` • `RunFlow` • `RunProgramProcess` • `SampleBusinessElementWithContext` • `SampleDynamicCustomElement` • `SendMail` • `TestCustomElement` • `UpdateCurrentValueForMemberAttribute` • `UpdatePointBalance` • `UpdateUsageForCumulativePromotion` • `VolumeDiscount`		
`advancedCondition`	Expression Set Advanced Condition Step Input	Details of the advanced condition if the step is an advanced condition step.	Optional	58.0
`aggregation`	Expression Set Aggregation Step Input	Aggregation details if the step is an aggregation step.	Optional	58.0
`assignment`	Expression Set Assignment Step Input	Assignment details if the step is an assignment step.	Optional	58.0
`conditionExpression`	Expression Set Condition Expression Step Input	Details of the condition if the step is a condition step.	Optional	58.0
`customElement`	Expression Set Custom Element Step Input	Details of the custom element if the step is a custom element step.	Optional	58.0
`description`	String	Description of the step.	Optional	58.0
`failedExplainerTemplate`	String	Name of the failed explainability message template.	Optional	58.0
`failedMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the failed explainability message template.	Optional	59.0

Name	Type	Description	Required or Optional	Available Version
`lookupTable`	Expression Set Lookup Table Step Input	Details of the lookup table for a decision matrix or decision table step.	Optional	58.0
`name`	String	Unique name of the step in the expression set version.	Required	58.0
`noResultExplainerTemplate`	String	Name of the explainability message template that's used when the evaluation result of the selected element type is No Result. This field is applicable for a Decision Table only.	Optional	59.0
`noResultMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the no result explainability message template.	Optional	59.0
`parentStep`	String	Unique name of the parent step in the expression set version.	Optional	58.0
`passedExplainerTemplate`	String	Name of the passed explainability message template.	Optional	58.0
`passedMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the passed explainability message template.	Optional	59.0
`resultIncluded`	Boolean	Indicates whether to include the step output in the expression set result (`true`) or not (`false`).	Optional	58.0
`sequenceNumber`	Integer	Sequence number of the step in the expression set version.	Required	58.0
`shouldExposeExecPathMsgOnly`	Boolean	Indicates whether the decision explanation includes information about the executed path only (`true`) or not (`false`) for the Branch element type.	Optional	58.0
`shouldExposeConditionDetails`	Boolean	Indicates whether the decision explanation includes the condition details (`true`) or not (`false`) for the Condition element type.	Optional	58.0
`shouldShowExplExternally`	Boolean	Indicates whether the decision explanation is exposed to community users for the step (`true`) or not (`false`).	Optional	58.0
`stepType`	String	Step type of the expression set. Valid values are: • `AdvancedCondition`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		• `Advanced ListFilter`—Available in version 59.0 and later. • `Branch` • `BusinessKnowledgeModel` • `Condition` • `DefaultPath` • `ListFilter`—Available in version 59.0 and later. • `ListGroup`—Available in version 59.0 and later. • `SubExpression`		
`subExpression`	Expression Set Sub Expression Step Input	Details of the subexpression if the step is a subexpression step.	Optional	58.0

Expression Set Version Variable Input

Input representation of a variable in an expression set version.

Root XML tag

```
<ExpressionSetVersionVariableInput>
```

JSON example

```
"variables": [
  {
    "collection": false,
    "dataType": "Text",
    "decimalPlaces": 2,
    "description": null,
    "input": true,
    "lookupName": "DM_for_test",
    "lookupType": "DecisionMatrix",
    "name": "City",
    "objectName": null,
    "output": false,
    "resultStep": null,
    "type": "Variable",
    "value": null
  },
  {
    "collection": false,
    "dataType": "Text",
    "decimalPlaces": null,
    "description": null,
    "input": false,
```

```
            "lookupName": "DM_for_test",
            "lookupType": "DecisionMatrix",
            "name": "DM_for_test__State",
            "objectName": null,
            "output": true,
            "resultStep": null,
            "type": "Variable",
            "value": null
          },
          {
            "collection": false,
            "dataType": "Text",
            "decimalPlaces": null,
            "description": "productName",
            "input": true,
            "lookupName": null,
            "lookupType": null,
            "name": "productName",
            "objectName": null,
            "output": false,
            "resultStep": null,
            "type": "Variable",
            "value": null
          },
          {
            "collection": false,
            "dataType": "Boolean",
            "decimalPlaces": null,
            "description": "condition_output__1",
            "input": false,
            "lookupName": null,
            "lookupType": null,
            "name": "condition_output__1",
            "objectName": null,
            "output": true,
            "resultStep": "Condition1",
            "type": "Variable",
            "value": null
          }
        ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
`collection`	Boolean	Indicates whether the variable is a collection (`true`) or not (`false`).	Optional	58.0
`dataType`	String	Data type of the variable in an expression set version. Valid values are: • `ActionOutput`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		• `Boolean` • `Currency` • `Date` • `DateTime` • `DecisionMatrix` • `DecisionTable` • `Numeric` • `Percent` • `Sobject` • `SubExpression` • `Text`		
`decimalPlaces`	Integer	Number of decimal places allowed for the value of the variable.	Optional	58.0
`description`	String	Description of the variable.	Optional	58.0
`input`	Boolean	Indicates whether the variable is an input of an expression set version (`true`) or not (`false`).	Optional	58.0
`lookupName`	String	API name of the decision matrix, decision table, or subexpression.	Optional	58.0
`lookupType`	String	Lookup type of the variable in an expression set version. Valid values are: • `DecisionMatrix` • `DecisionTable` • `SubExpression`	Optional	58.0
`name`	String	Name of the variable.	Required	58.0
`objectName`	String	Name of the object when the variable is of the sObject type.	Optional	58.0
`output`	Boolean	Indicates whether the variable is output of an expression set version (`true`) or not (`false`).	Optional	58.0
`resultStep`	String	Name of the step that's assigning the value to this variable.	Optional	58.0
`type`	String	Type of the variable in an expression set. Valid values are: • `Constant`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		• `Formula` • `Variable`		
`value`	String	Represents a value for a constant variable type and represents a formula for a formula variable type.	Optional	58.0

Response Bodies

Expression Set API includes these response bodies.

Current Value
Output representation of the current value of the guardrail at a row level.

BRE Guardrails
Output representation of the BRE guardrails for each component.

BRE Guardrails Result
Output representation of the BRE Guardrails result.

Guardrails
Output representation of each guardrail that includes information to manage system thresholds and notifications in BRE components.

Guardrail Current Value
Output representation of the current values of the guardrails along with the resource type.

Business Rules Aggregation Results
Output representation of expression set results.

Business Rules Results
Output representation of executing an expression set.

Context Definition Output
Output representation of the context definitions in an expression set.

Dependency Detail Output
Output representation of the expression set version dependencies.

Error Result
Output representation of the errors in the execution of an expression set.

Expression Set Output
Output representation of the expression set create, update and delete request.

Expression Set Advanced Condition Step
Output representation of an advanced condition step in an expression set.

Expression Set Aggregation Step
Output representation of the expression set aggregation step.

Expression Set Assignment Step
Output representation of an assignment step in an expression set.

Expression Set Condition Criteria
Output representation of a condition criteria in an expression set.

Expression Set Condition Expression Step
Output representation of a condition step in an expression set.

Expression Set Custom Element Parameter
Output representation of a custom element parameter in an expression set.

Expression Set Custom Element Step
Output representation of a custom element step in an expression set.

Expression Set DES Token Mapping
Output representation of the DES token mapping in an expression set version step.

Expression Set Error
Representation of the expression set errors.

Expression Set Lookup Table Step
Output representation of a lookup table step in an expression set.

Expression Set SubExpression Step
Output representation of a subexpression step in an expression set.

Expression Set Version Dependency
Output representation for the expression set version dependency.

Expression Set Version Output
Output representation of an expression set version.

Expression Set Version Step
Output representation of a step in an expression set version.

Expression Set Version Variable
Output representation of a variable in an expression set version.

Rule Results
Output representation of the result of executing a single input in an expression set.

Variable Map Output
Output representation of the input variables in an expression set version.

Variable Output
Output representation of the input variables in an expression set.

Current Value

Output representation of the current value of the guardrail at a row level.

```
{
  "values": {
    "currentValue": "50"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
currentValue	String	Current value at a row-level.	Small, 63.0	63.0
	String	Unique identifier name of the sObject that the current value is provided from.	Small, 63.0	63.0

BRE Guardrails

Output representation of the BRE guardrails for each component.

JSON Sample

```
{
  "result": [
    {
      "componentName": "DecisionTable",
      "guardrails": [
        {
          "name": "MaxProcessLimit",
          "guardrailType": "RateLimit",
          "limitValue": "100",
          "currentValue": "50",
          "notificationSupported": true
        }
      ]
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
result	BRE Guardrails Result[]	Guardrails associated with the specified BRE component.	Small, 63.0	63.0

BRE Guardrails Result

Output representation of the BRE Guardrails result.

JSON Sample

```
{
  "result": [
    {
      "componentName": "DecisionTable",
      "guardrails": [
        {
          "name": "MaxProcessLimit",
          "guardrailType": "RateLimit",
          "limitValue": "100",
          "currentValue": "50",
          "notificationSupported": true
```

```
            }
          ]
        }
      ]
    }
```

Property Name	Type	Description	Filter Group and Version	Available Version
`componentName`	String	Name of the BRE component that the guardrail is fetched for.	Small, 63.0	63.0
`guardrails`	Guardrails[]	Specify the guardrails for the provided BRE component.	Small, 63.0	63.0

Guardrails

Output representation of each guardrail that includes information to manage system thresholds and notifications in BRE components.

JSON Sample

```
{
  "guardrails": {
    "name": "MaxProcessLimit",
    "guardrailType": "RateLimit",
    "limitValue": "100",
    "currentValue": "50",
    "notificationSupported": true
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`currentValue`	String	Current value of the guardrail.	Small, 63.0	63.0
	Guardrail Current Value	Resource type and the row-level current values of the guardrail. For future use only.	Small, 63.0	63.0
`guardrailType`	Guardrail Type (enumeration of type string)	Type of guardrail. Valid values are: • `RateLimit` • `OrgValueLimit`	Small, 63.0	63.0
`limitValue`	String	Default or configured value of the given guardrail	Small, 63.0	63.0
	String	Maximum value of the given guardrail. For future use only.	Small, 63.0	63.0
`multiValue`	Boolean	Specifies details if the current values are determined by an org level or aggregation of row levels.	Small, 63.0	63.0

Property Name	Type	Description	Filter Group and Version	Available Version
`name`	String	Name of the guardrail.	Small, 63.0	63.0
`notificationSupported`	Boolean	Indicates whether the guardrail supports notifications (`true`) or not (`false`).	Small, 63.0	63.0

Guardrail Current Value

Output representation of the current values of the guardrails along with the resource type.

```
{
  "currentValues": {
    "resourceType": "ExampleResource",
    "values": {
      "currentValue": "50",
      "resourceName": "Resource1"
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`resourceType`	String	Name of the sObject that the current value of the guardrail is determined from.	Small, 63.0	63.0
`values`	Current Value[]	Row-level current values of the guardrail.	Small, 63.0	63.0

Business Rules Aggregation Results

Output representation of expression set results.

Property Name	Type	Description	Filter Group and Version	Available Version
`error`	Error Result	The details of the error.	Small, 55.0	55.0
`results`	Variable Map Output	The result of the aggregation step in an expression set.	Small, 55.0	55.0

Business Rules Results

Output representation of executing an expression set.

JSON example

```
{
  "outputs": [
    {
      "result": {
```

```
        "Premium": "1200",
        "Tax": "100"
      },
      "variables": {
        "age": "25",
        "state": "CA"
      },
      "error": {
        "stepId": "<stepId>",
        "errorMessage": "The rule is missing inputs: ['var1', 'var2'] and 3 more steps
 have 5 error"
      }
    },
    {
      "result": {
        "Premium": "2400",
        "Tax": "300"
      }
    },
    {
      "result": {
        "Premium": "500",
        "Tax": "25"
      }
    }
  ],
  "aggregationResults": {
    "result": {
      "TotalPremium": "4100",
      "TotalTax": "425"
    },
    "error": {
      "stepId": "<stepId>",
      "errorMessage": "The rule is missing inputs: ['var1', 'var2'] and 3 more steps
have 5 error"
    }
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
aggregationResults	Business Rule Aggregation Results Output	The result of the aggregation step in an expression set.	Small, 55.0	55.0
outputs	Rule Result[]	List of outputs returned by an expression set.	Small, 55.0	55.0

Context Definition Output

Output representation of the context definitions in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`id`	String	ID of the context definition.	Small, 58.0	58.0
`name`	String	Developer name of the context definition.	Small, 58.0	58.0

Dependency Detail Output

Output representation of the expression set version dependencies.

Property Name	Type	Description	Filter Group and Version	Available Version
`apiName`	String	Name of the expression set version dependency detail API.	Small, 58.0	58.0
`id`	String	ID of the expression set version dependency. Note: This ID can be used as the ID of the expression set, decision matrix, or decision table.	Small, 58.0	58.0
`lastModifiedDate`	String	Date on which the dependency was modified last.	Small, 58.0	58.0
`name`	String	Expression set version dependency name.	Small, 58.0	58.0
`type`	String	Type of the expression set version dependencies. Possible values: • `DecisionMatrix` • `DecisionTable` • `ExpressionSet`	Small, 58.0	58.0

Error Result

Output representation of the errors in the execution of an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`errorMessage`	String	The message that provides details of the error in executing an expression set.	Small, 55.0	55.0
`stepId`	String	The ID of a step in an expression set version that resulted in an error.	Small, 55.0	55.0

Expression Set Output

Output representation of the expression set create, update and delete request.

Property Name	Type	Description	Filter Group and Version	Available Version
`apiName`	String	Unique name of the expression set.	Small, 58.0	58.0
`contextDefinitions`	Context Definition Output	List of context definitions in an expression set.	Small, 58.0	58.0
`description`	String	Description of the expression set.	Small, 58.0	58.0
`error`	Expression Set Error	Details of the error message in the case of failure of the expression set create request.	Small, 58.0	58.0
`id`	String	ID of the expression set.	Small, 58.0	58.0
`name`	String	Name of the expression set.	Small, 58.0	58.0
`status`	String	Response status of the expression set. Valid values are: • `Failed` • `Success`	Small, 58.0	58.0
`usageType`	String	Usage type of the expression set. Valid value is `Bre`. The default value is `Bre`. When Business Rules Engine is enabled for a Salesforce org, the default value is `Bre`. Other usage types may be available to you depending on your industry solution and permission sets.	Small, 58.0	58.0
`versions`	Expression Set Version Output	List of the expression set versions.	Small, 58.0	58.0

Expression Set Advanced Condition Step

Output representation of an advanced condition step in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`conditionLogic`	String	Condition that's defined for the advanced condition. For example, all conditions are met or any of the conditions are met.	Small, 58.0	58.0
`criteria`	Expression Set Condition Criteria	List of condition criteria in an expression set.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
`result Parameter`	String	Expression set definition version variable associated with the result of this step.	Small, 58.0	58.0

Expression Set Aggregation Step

Output representation of the expression set aggregation step.

Property Name	Type	Description	Filter Group and Version	Available Version
`aggergated Parameter`	String	Expression set version variable that's present on the right side of the aggregation step.	Small, 58.0	58.0
`aggregate Function`	String	Aggregation function of the expression set. Valid values are: • `Avg` • `Max` • `Min` • `Sum`	Small, 58.0	58.0
`expression`	String	Expression that's present on the left side of the aggregation step.	Small, 58.0	58.0

Expression Set Assignment Step

Output representation of an assignment step in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`assigned Parameter`	String	Expression set version variable that's present on the right side of the calculation step.	Small, 58.0	58.0
`expression`	String	Expression that's present on the left side of the calculation step.	Small, 58.0	58.0

Expression Set Condition Criteria

Output representation of a condition criteria in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`operator`	String	Condition operator of the expression set. Valid values are:	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
		• `Contains` • `DoesNotContain` • `Equals` • `GreaterThanOrEquals` • `GreaterThan` • `IsNotNull` • `IsNull` • `LessThan` • `LessThanOrEquals` • `NotEqualTo`		
`sequenceNumber`	Integer	Sequence number of the condition in the advanced condition.	Small, 58.0	58.0
`sourceFieldName`	String	Expression set version variable associated with the condition criteria.	Small, 58.0	58.0
`value`	String	Value specified in the right-hand side of the condition.	Small, 58.0	58.0
`valueType`	String	Criteria value type of the expression set. Valid values are: • `Formula` • `Literal` • `Parameter`	Small, 58.0	58.0

Expression Set Condition Expression Step

Output representation of a condition step in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`expression`	String	Expression that's defined for the step.	Small, 58.0	58.0
`resultParameter`	String	Expression set version variable associated with the result of the step.	Small, 58.0	58.0

Expression Set Custom Element Parameter

Output representation of a custom element parameter in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`input`	Boolean	Indicates whether the custom element parameter is an input parameter (`true`) or not (`false`).	Small, 58.0	58.0
`name`	String	Name of the custom element parameter.	Small, 58.0	58.0
`output`	Boolean	Indicates whether the custom element parameter is an output parameter (`true`) or not (`false`).	Small, 58.0	58.0
`type`	String	Type of custom element parameter. Valid values are: • `Formula` • `Literal` • `Lookup` • `Parameter` • `Picklist` The default value is `Parameter`.	Small, 58.0	58.0
`value`	String	Name of the expression set variable.	Small, 58.0	58.0

Expression Set Custom Element Step

Output representation of a custom element step in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`parameters`	Expression Set Custom Element Parameter	List of parameters in a custom element.	Small, 58.0	58.0

Expression Set DES Token Mapping

Output representation of the DES token mapping in an expression set version step.

JSON example

```
"passedMessageTokenMappings": [
{
"expressionSetMessageToken": "price",
"resourceReference": "DM1__Price"
}
],
"failedMessageTokenMappings": [
{
"expressionSetMessageToken": "model",
```

```
"resourceReference": "Model"
}
],

"noResultTokenMappings": [
{
"expressionSetMessageToken": "year",
"resourceReference": "Year"
}
]
```

Properties

Name	Type	Description	Filter Group and Version	Available Version
`resourceReference`	String	Name of the expression set resource that's mapped to a token, such as Variable, Constant, or FiledAlias.	Small, 59.0	59.0
`expressionSetMessageToken`	String	Name of the explainability message template token.	Small, 59.0	59.0

Expression Set Error

Representation of the expression set errors.

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	Error message in the creation of the expression set.	Small, 58.0	58.0

Expression Set Lookup Table Step

Output representation of a lookup table step in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`lookupTableName`	String	Decision matrix or decision table name that's used in the lookup table step.	Small, 58.0	58.0
`type`	String	Lookup table type of the expression set. Valid values are: • `DecisionMatrix` • `DecisionTable`	Small, 58.0	58.0

Expression Set SubExpression Step

Output representation of a subexpression step in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`expressionSet`	String	Expression set name that's used in the subexpression set step.	Small, 58.0	58.0

Expression Set Version Dependency

Output representation for the expression set version dependency.

Property Name	Type	Description	Filter Group and Version	Available Version
`dependencies`	Dependency Detail Output[]	Dependent components of the expression set version.	Small, 58.0	58.0
`id`	String	Expression set dependency version ID.	Small, 58.0	58.0

Expression Set Version Output

Output representation of an expression set version.

Property Name	Type	Description	Filter Group and Version	Available Version
`apiName`	String	API name of the expression set version.	Small, 58.0	58.0
`description`	String	Description of the expression set version.	Small, 58.0	58.0
`enabled`	Boolean	Indicates whether the expression set version is active (`true`) or inactive (`false`).	Small, 58.0	58.0
`endDate`	String	Effective end date of the expression set version.	Small, 58.0	58.0
`id`	String	ID of the expression set version.	Small, 58.0	58.0
`name`	String	Name of the expression set version.	Small, 58.0	58.0
`rank`	Integer	Rank of the expression set version.	Small, 58.0	58.0
`showExplExternally`	Boolean	Indicates whether the decision explanation is exposed to community users (`true`) or not (`false`).	Small, 58.0	58.0
`startDate`	String	Effective start date of the expression set version.	Small, 58.0	58.0
`steps`	Expression Set Version Step	List of steps in an expression set.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
`variables`	Expression Set Version Variable	List of variables in an expression set.	Small, 58.0	58.0
`versionNumber`	Integer	Version number of the expression set version.	Small, 58.0	58.0

Expression Set Version Step

Output representation of a step in an expression set version.

Property Name	Type	Description	Filter Group and Version	Available Version
`actionType`	String	Business Knowledge Model of the expression set. Valid values are: • `AiAccelerator SubscriberChurnPrediction` • `AssignBadgeToMember` • `AssignParameterValues` • `AutomatedClaimsProcessing Validation` • `BreAggregator` • `BreAggregatorAssignment` • `ChangeMemberTier` • `CheckMember BadgeAssignment` • `CreditPoints` • `Crud` • `DebitPoints` • `EvaluateQualification` • `EvaluateDisqualification` • `GetMemberAttributesValues` • `GetMemberPointBalance` • `GetMemberPromotions` • `GetMemberTier` • `GetOutputsFromDecision Matrix` • `GetOutputsFromDecision Table` • `GetUserData`	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
		• IncreaseUsageForCumulativePromotion • IssueVoucher • ListGroupCalculation • PriceList • RecordAlert • RedeemVoucher • RedeemVoucher • RunFlow • RunProgramProcess • SampleBusinessElementWithContext • SampleDynamicCustomElement • SendMail • TestCustomElement • UpdateCurrentValueForMemberAttribute • UpdatePointBalance • UpdateUsageForCumulativePromotion • VolumeDiscount		
advancedCondition	Expression Set Advanced Condition Step	Details of the advanced condition in case of an advanced condition step.	Small, 58.0	58.0
aggregation	Expression Set Aggregation Step	Details of the aggregation step in case of an aggregation step.	Small, 58.0	58.0
assignment	Expression Set Assignment Step	Details of the assignment step in case of an assignment step.	Small, 58.0	58.0
conditionExpression	Expression Set Condition Expression Step	Details of the condition step in case of a condition step.	Small, 58.0	58.0
customElement	Expression Set Custom Element Step	Details of the custom element step in case of a custom element step.	Small, 58.0	58.0
description	String	Description of the step in expression set version.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
`failedExplainerTemplate`	String	Name of the failed explainability message template.	Small, 58.0	58.0
`failedMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the failed explainability message template.	Optional	59.0
`lookupTable`	Expression Set Lookup Table Step	Details of the lookup table in case of a decision matrix or decision table step.	Small, 58.0	58.0
`name`	String	Unique name of the step in expression set version.	Small, 58.0	58.0
`noResultExplainerTemplate`	String	Name of the explainability message template that's used when the evaluation result of the selected element type is No Result. This field is applicable for a Decision Table only.	Small, 59.0	59.0
`noResultMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the no result explainability message template.	Small, 59.0	59.0
`parentStep`	String	Unique name of the parent step of this step in the expression set version.	Small, 58.0	58.0
`passedExplainerTemplate`	String	Name of the passed explainability message template.	Small, 58.0	58.0
`passedMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the passed explainability message template.	Small, 59.0	59.0
`resultIncluded`	Boolean	Indicates whether to include the step output in the expression set result (`true`) or not (`false`).	Small, 58.0	58.0
`sequenceNumber`	Integer	Sequence number of the step in the expression set version.	Small, 58.0	58.0
`shouldExposeConditionDetails`	Boolean	Indicates whether the decision explanation includes the condition details (`true`) or not (`false`) for the condition element type.	Small, 58.0	58.0
`shouldExposeExecPathMsgOnly`	Boolean	Indicates whether the decision explanation includes details of the executed path only (`true`) or not (`false`) for the branch element type.	Small, 58.0	58.0
`shouldShowExplExternally`	Boolean	Indicates whether the decision explanation is exposed to community users for the step (`true`) or not (`false`).	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
stepType	String	Step type of the expression set. Valid values are: • AdvancedCondition • Branch • BusinessKnowledgeModel • Condition • DefaultPath • SubExpression	Small, 58.0	58.0
subExpression	Expression Set SubExpression Step	Details of the subexpression set in case of a subexpression step.	Small, 58.0	58.0

Expression Set Version Variable

Output representation of a variable in an expression set version.

Property Name	Type	Description	Filter Group and Version	Available Version
collection	Boolean	Indicates whether the variable is a collection (true) or not (false).	Small, 58.0	58.0
dataType	String	Variable data type for the expression set. • ActionOutput • Boolean • Currency • Date • DateTime • DecisionMatrix • DecisionTable • Numeric • Percent • Sobject • SubExpression • Text	Small, 58.0	58.0
decimalPlaces	Integer	Number of decimal places allowed for the value of the variable.	Small, 58.0	58.0
description	String	Description of the variable.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
`input`	Boolean	Indicates whether the variable is the input of an expression set version (`true`) or not (`false`).	Small, 58.0	58.0
`lookupName`	String	API name of the decision matrix, decision table, or subexpression.	Small, 58.0	58.0
`lookupType`	String	Variable lookup type of the expression set. Valid values are: • `DecisionMatrix` • `DecisionTable` • `SubExpression`	Small, 58.0	58.0
`name`	String	Name of the variable.	Small, 58.0	58.0
`objectName`	String	Name of the object when the variable is of sObject type.	Small, 58.0	58.0
`output`	Boolean	Indicates whether the variable is the output of an expression set version (`true`) or not (`false`).	Small, 58.0	58.0
`resultStep`	String	Name of the step that's producing the value to the variable.	Small, 58.0	58.0
`type`	String	Variable type of the expression set. Valid values are: • `Constant` • `Formula` • `Variable`	Small, 58.0	58.0
`value`	String	Represents a value in case of a constant variable type and a formula in case of a formula variable type.	Small, 58.0	58.0

Rule Results

Output representation of the result of executing a single input in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
`error`	Error Result	The details of the error resulting from executing a single input in an expression set.	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
results	Variable Map Output	The result of the aggregation step in an expression set.	Small, 55.0	55.0

Variable Map Output

Output representation of the input variables in an expression set version.

Property Name	Type	Description	Filter Group and Version	Available Version
variableMap	Map<String, Object>	A map of input variables and their corresponding values.	Small, 55.0	55.0

Variable Output

Output representation of the input variables in an expression set.

Property Name	Type	Description	Filter Group and Version	Available Version
name	String	The name of the variable.	Small, 55.0	55.0
value	Object	The value of the variable.	Small, 55.0	55.0

Expression Set Invocable Actions

Use actions to invoke Expression Set actions in a flow.

Note: You can also use the Invocable namespace, which contains the classes and methods required to invoke the Decision Matrix and Expression Set invocable actions from Apex. See Invocable Namespace.

Expression Set Actions
Invoke an active expression set. An expression set is a user-defined rule that accepts an input and returns the output based on the configured function.

Expression Set Actions

Invoke an active expression set. An expression set is a user-defined rule that accepts an input and returns the output based on the configured function.

The configured function of an expression set can be a simple decision matrix lookup, a calculation based on a mathematical formula, a condition, or another expression set.

When a Flow is invoked using Batch management (for example, for processing 200 records), the calls to expression sets are automatically bulkified, which allows the execution of multiple inputs in a single request.

These actions are available in API version 55.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v55.0/actions/custom/runExpressionSet/{ApiName}`

Note: The API name of an expression set is unique within your Salesforce instance.

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Inputs

Vary depending on the selected expression set.

Outputs

Vary depending on the inputs of the selected expression set.

Usage

This section has the sample request and response for invoking an expression set with these steps.

1. Find the tax percentage and the premium corresponding to specific age and salary using a decision matrix lookup.
2. Check the age criterion to calculate the total tax.
3. Calculate the total tax to be paid based on the age group, salary, and the tax percentage.

Sample request

Here's an example POST request that has the inputs, such as, age and salary:

```
{
  "inputs": [
    {
      "Age": "25.00",
      "Salary": "50000.00"
    },
    {
      "Age": "30.00",
      "Salary": "70000.00"
    },
    {
      "Age": "40.00",
      "Salary": "90000.00"
    }
  ]
}
```

Sample response

Here's an example response that has the premium and tax values based on the inputs provided in the example request:

```
[
  {
    "actionName": "TaxPremiumES",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "TaxPremium__Premium": 1000,
      "TaxPremium__Tax": 10,
      "TaxToBePaid": 1050,
      "condition_output__2": "false",
      "condition_output__1": "true"
    }
  },
  {
    "actionName": "TaxPremiumES",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "TaxPremium__Premium": 1500,
      "TaxPremium__Tax": 12,
      "TaxToBePaid": 1512,
      "condition_output__2": "true",
      "condition_output__1": "false"
    }
  },
  {
    "actionName": "TaxPremiumES",
    "errors": null,
    "isSuccess": true,
    "outputValues": {
      "TaxPremium__Premium": 2000,
      "TaxPremium__Tax": 15,
      "TaxToBePaid": 2015,
      "condition_output__2": "false",
      "condition_output__1": "true"
    }
  }
]
```

Expression Set Metadata API Types

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

ExpressionSetDefinition

Represents an expression set definition.

ExpressionSetMessageToken

Represents an interface to retrieve, deploy, create, update, or delete information on Expression Set Message Token.

ExpressionSetObjectAlias

Represents information about the alias of the source object that's used in an expression set.

Flow for Expression Set

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.

SEE ALSO:

Metadata API Developer Guide: Understanding Metadata API

ExpressionSetDefinition

Represents an expression set definition.

Note: Before deploying an expression set or an expression set version to a target org, review these Expression Set Migration Considerations.

Parent Type

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

File Suffix and Directory Location

ExpressionSetDefinition components have the suffix `.expressionSetDefinition` and are stored in the `expressionSetDefinition` folder.

Version

ExpressionSetDefinition components are available in API version 55.0 and later.

Fields

Field Name	Description
`description`	**Field Type** string **Description** The description of an expression set definition.
`executionScale`	**Field Type** ExpsSetExecutionScale (enumeration of type string) **Description** Specifies the scale of the inputs that an expression set processes. The scale determines where the expression set is executed. Valid values are: • `High`

Field Name	Description
	• `Low` Available in API version 61.0 and later.
`interfaceSourceType`	**Field Type** ExpsSetInterfaceSourceType (enumeration of type string) **Description** The interface source type designed by the consuming cloud that's making a customized expression set builder available to its users. Valid values are: • `Constraint` (Available in API version 62.0 and later). • `DiscoveryProcedure` (Available in API version 61.0 and later). • `EventOrchestration` (Available in API version 61.0 and later). • `PricingProcedure` • `QualificationProcedure` • `RatingDiscoveryProcedure` (Available in API version 61.0 and later). • `Sample` Available in API version 59.0 and later.
`label`	**Field Type** string **Description** Required. The UI label of an expression set definition.
`processType`	**Field Type** ExpsSetProcessType (enumeration of type string) **Description** The process type that uses the expression set rule. Valid values are: • `Bre` • `GpaCalculation` • `PlanCostCalculation` • `RatingDiscovery` • `StudentSuccess` • Note: When Business Rules Engine is enabled for a Salesforce instance, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets.

Field Name	Description
resourceInitializationType	**Field Type** ResourceInitializationType (enumeration of type string) **Description** Indicates whether the initial value of expression set variables and context tags is null or a default value. Valid values are: • Default • Off Available in API version 64.0 and later.
template	**Field Type** boolean **Description** Defines whether an expression set is a template or not.
versions	**Field Type** ExpressionSetDefinitionVersion[] **Description** Represents an array of expression set version definitions in an expression set. Note: This array must contain at least one version.

ExpressionSetDefinitionVersion

Represents a definition of an expression set version.

Field Name	Description
decimalScale	**Field Type** integer **Description** Number of decimal places to be used in the results of calculation steps that involve context variables.
description	**Field Type** string **Description** Describes the version of an expression set definition.
endDate	**Field Type** dateTime

Field Name	Description
	Description The date until which the expression set definition is available for use.
`expressionSetDefinition`	**Field Type** string **Description** The full name of an expression set definition.
`label`	**Field Type** string **Description** Required. The UI label of an expression set definition.
`rank`	**Field Type** int **Description** The rank of the `Expression Set Definition Version`. When more than one enabled version matches an expression set call, and the start date time to end date time spans overlap, the version with the highest rank is chosen. Available in API version 62.0 and later.
`shouldShowExplExternally`	**Field Type** boolean **Description** Indicates whether the decision explanation is exposed to external users (`true`) or not (`false`). The default value is `false`. Available in API version 56.0 and later.
`startDate`	**Field Type** dateTime **Description** Required. The date from when the expression set definition is available for use.
`status`	**Field Type** ExpsSetStatus (enumeration of type string) **Description** Required. The status of an expression set definition. Possible values are: • `Active`

Field Name	Description
	• `Draft` • `Inactive` • `InvalidDraft` • `Obsolete`
`steps`	**Field Type** ExpressionSetStep[] **Description** Represents an array of steps created in an expression set version.
`uiTier`	**Field Type** boolean **Description** Indicates whether the API call originated from the design time builder or a package. Note: This field is for internal use only.
`variables`	**Field Type** ExpressionSetVariable[] **Description** Represents an array of variables in an expression set version.
`versionNumber`	**Field Type** int **Description** Required. The version number of an expression set definition.

ExpressionSetStep

Represents a step in an expression set version.

Field Name	Description
`actionType`	**Field Type** BusinessKnowledgeModel (enumeration of type string) **Description** Specifies the type of action this step executes. Valid values are: • `AiAcceleratorSubscriberChurnPrediction` • `ApexAction`

Field Name	Description
	• `ApexListAction` (Available in API version 64.0 and later.) • `AssetDiscovery` • `AssignBadgeToMember` • `AssignParameterValues` • `AssignmentElement` • `BaseRate` • `BreAggregator` • `BreAggregatorAssignment` • `BreakdownLineMapping` (Available in API version 64.0 and later.) • `ChangeMemberTier` • `CheckMemberBadgeAssignment` • `CommercePricing` (Available in API version 62.0 and later.) • `ComplianceCheck` • `ComplianceControlLog` (Available in API version 62.0 and later.) • `Constraint` (Available in API version 64.0 and later.) • `CreditPoints` • `Crud` • `DebitPoints` • `DerivedPricing` • `DiscountDistributionService` • `DiscoverySettings` (Available in API version 64.0 and later.) • `EvaluateCategoryDisqualification` (Available in API version 62.0 and later.) • `EvaluateCategoryQualification` (Available in API version 62.0 and later.) • `FormulaBasedRating` (Available in API version 62.0 and later.) • `FormulaBasedPricing` • `GetMemberAttributesValues` • `GetMemberPointBalance` • `GetMemberPromotions` • `GetMemberTier` • `GetOutputsFromDecisionMatrix` • `GetOutputsFromDecisionTable` • `GroupingAndAggregateRating` (Available in API version 62.0 and later.) • `IncreaseUsageForCumulativePromotion` • `IntegrationOrchestration` • `IssueVoucher` • `ManualRatingDiscount` (Available in API version 62.0 and later.) • `MapProduct`

Field Name	Description
	• `MinimumPrice` (Available in API version 62.0 and later.) • `MultiRecipientProductQualification` (Available in API version 64.0 and later.) • `NegotiatedBaseRate` (Available in API version 64.0 and later.) • `NegotiatedRateCardEntryResolution` (Available in API version 64.0 and later.) • `NegotiatedTierAdjustment` (Available in API version 64.0 and later.) • `NegotiatedVolumeAdjustment` (Available in API version 64.0 and later.) • `PriceGuidance` (Available in API version 64.0 and later.) • `PricingSettings` • `PromotionsDiscount` • `RateAdjustmentByAttributeResolution` (Available in API version 62.0 and later.) • `RateAdjustmentByTierResolution` (Available in API version 62.0 and later.) • `RateAdjustmentMatrix` (Available in API version 62.0 and later.) • `RateAssignment` (Available in API version 62.0 and later.) • `RateCardEntryResolution` (Available in API version 62.0 and later.) • `RateCardResolution` (Available in API version 62.0 and later.) • `RatingAttributeDiscount` • `RatingRoundingValues` (Available in API version 62.0 and later.) • `RatingSetting` • `RatingTierDiscount` • `RatingVolumeDiscount` • `RecordAction` • `RoundingValues` • `RuleFetch` • `RunFlow` • `RunProgramProcess` • `SampleCustomElementWithExpressionAndListFilter` • `StopPricing` • `StopRating` (Available in API version 62.0 and later.) • `TermGpaCalculation` (Available in API version 64.0 and later.) • `TermGpaReporting` (Available in API version 64.0 and later.) • `TestCustomElement` • `UpdateCurrentValueForMemberAttribute` • `UpdatePointBalance` • `UpdateUsageForCumulativePromotion` • `UpsertRecord` (Available in API version 64.0 and later.) • `VolumeTierDiscount`

Field Name	Description
advancedCondition	**Field Type** ExpressionSetAdvancedCondition **Description** Represents an advanced condition step.
aggregation	**Field Type** ExpressionSetAggregation **Description** Represents an aggregation step.
assignment	**Field Type** ExpressionSetAssignment **Description** Represents an assignment step.
conditionExpression	**Field Type** ExpressionSetConditionExpression **Description** Represents a condition step.
customElement	**Field Type** ExpressionSetCustomElement **Description** Represents a custom element step that contains the input and output mappings. Available in API version 56.0 and later.
decisionTable	**Field Type** ExpressionSetDecisionTable **Description** Represents a decision matrix or decision table step.
description	**Field Type** string **Description** Describes an expression set definition version step.
failedExplainerTemplate	**Field Type** string **Description** The explainability message template that's used when the result type of a condition step in an expression set is Failed.

Field Name	Description
`failedMessageTokenMappings`	**Field Type** ExplainabilityMessageTemplateTokenMapping (enumeration of type string) **Description** List of the token resource mappings of the failed explainability message template. Valid values are: • `expressionSetMessageToken` • `resourceReference` Available in API version 59.0 and later.
`label`	**Field Type** string **Description** Required. The UI label of an expression set definition version step.
`name`	**Field Type** string **Description** Required. The full name of an expression set definition version step.
`noResultExplainerTemplate`	**Field Type** string **Description** The explainability message template that's used when the result type of a condition step in an expression set is No Result. Available in API version 59.0 and later.
`noResultMessageTokenMappings`	**Field Type** ExplainabilityMessageTemplateTokenMapping (enumeration of type string) **Description** List of the token resource mappings of the no result explainability message template. Valid values are: • `expressionSetMessageToken` • `resourceReference` Available in API version 59.0 and later.
`parentStep`	**Field Type** string

Field Name	Description
	Description The name of the parent step in an expression set definition version that's associated with a step.
`passedExplainerTemplate`	**Field Type** string **Description** The explainability message template that's used when the result type of a condition step in an expression set is Passed.
`passedMessageTokenMappings`	**Field Type** ExplainabilityMessageTemplateTokenMapping (enumeration of type string) **Description** List of the token resource mappings of the passed explainability message template. Valid values are: • `expressionSetMessageToken` • `resourceReference` Available in API version 59.0 and later.
`resultIncluded`	**Field Type** boolean **Description** Indicates whether the step output must be included in the expression result (true) or not (false).
`sequenceNumber`	**Field Type** int **Description** Required. The sequence number of a step in an expression set definition version.
`shouldExposExecPathMsgOnly`	**Field Type** boolean **Description** Indicates whether the message in the explainability message template is exposed for only the branch path that was run.
`shouldExposeConditionDetails`	**Field Type** boolean **Description** Indicates whether the details of the condition are shown in the decision explanation.

Field Name	Description
shouldShowExplExternally	**Field Type** boolean **Description** Indicates whether the decision explanations are shown to external users.
stepType	**Field Type** ExpsSetStepType (enumeration of type string) **Description** Required. Specifies the type of step in an expression set definition version. Valid values are: • AdvancedCondition • Branch • BusinessKnowledgeModel • Condition • DefaultPath • SubExpression
subExpression	**Field Type** ExpressionSetSubExpression **Description** Represents a sub expression step.

ExpressionSetAdvancedCondition

Represents an advanced condition step.

Field Name	Description
conditionLogic	**Field Type** string **Description** Required. The condition that's defined for an advanced condition.
criteria	**Field Type** ExpressionSetConditionCriteria [] **Description** Represents an array of criteria defined in the advanced condition.

Field Name	Description
`errorMessage`	**Field Type** string **Description** An error message for a failed advanced condition.
`resultParameter`	**Field Type** string **Description** An expression set definition version variable associated with the result of a step.
`successMessage`	**Field Type** string **Description** A success message for a successful advanced condition.

ExpressionSetConditionCriteria

Represents a criterion defined in an advanced condition.

Field Name	Description
`operator`	**Field Type** ExpsSetConditionOperator (enumeration of type string) **Description** Required. Specifies the operator for evaluating an expression. Valid values are: • `Contains` • `DoesNotContain` • `Equals` • `GreaterThan` • `GreaterThanOrEquals` • `IsNull` • `IsNotNull` • `LessThan` • `LessThanOrEquals` • `NoEquals`
`sequenceNumber`	**Field Type** int

Field Name	Description
	Description Required. The position of the condition in a step that contains multiple conditions.
`sourceFieldName`	**Field Type** string **Description** Required. The expression set definition version variable associated with the result of a condition criterion.
`value`	**Field Type** string **Description** Specifies the condition of a criterion.
`valueType`	**Field Type** ExpsSetValueType (enumeration of type string) **Description** Specifies the type of value. Valid values are: • `Formula` • `Literal` • `Lookup` • `Parameter` • `Picklist`

ExpressionSetAggregation

Represents an aggregation step.

Field Name	Description
`aggregatedParameter`	**Field Type** string **Description** Required. The expression set definition version variable associated with the result of a condition criterion.

Field Name	Description
`aggregateFunction`	**Field Type** ExpsSetAggregationFunction (enumeration of type string) **Description** Required. Specifies the aggregation function used in a step. Valid values are: • `Avg` • `Max` • `Min` • `Sum`
`expression`	**Field Type** string **Description** Required. Specifies the expression of an aggregation.

ExpressionSetAssignment

Represents an assignment step.

Field Name	Description
`aggregatedParameter`	**Field Type** string **Description** Required. The expression set definition version variable associated with a step detail.
`expression`	**Field Type** string **Description** Required. The expression that's defined for a step.

ExpressionSetConditionExpression

Represents a condition in a condition step.

Field Name	Description
errorMessage	**Field Type** string **Description** An error message for a failed condition.
expression	**Field Type** string **Description** Required. The expression that's defined for a step.
resultParameter	**Field Type** string **Description** The expression set definition version variable associated with the result of a step.
successMessage	**Field Type** string **Description** A success message for a successful condition.

ExpressionSetCustomElement

Represents a custom element in an expression set. Available in API version 56.0 and later.

Field Name	Description
parameters	**Field Type** ExpressionSetElementParameter[] **Description** Represents the list of parameters in the custom element.

ExpressionSetElementParameter

Represents a parameter within a custom element of an expression set. Available in API version 56.0 and later.

Field Name	Description
input	**Field Type** boolean **Description** Required.

Field Name	Description
	Indicates whether the custom element parameter is input (`true`) or not (`false`). The default value is `true`.
`name`	**Field Type** string **Description** Required. The name of the custom element parameter.
`output`	**Field Type** boolean **Description** Required. Indicates whether the custom element parameter is output (`true`) or not (`false`). The default value is `true`.
`type`	**Field Type** ExpsSetValueType (enumeration of type string) **Description** The type of custom element parameter. Values are: • `Formula` • `Literal` • `Lookup` • `Parameter` • `PickList` The default value is `Parameter`.
`value`	**Field Type** string **Description** Required. The name of the expression set variable.

ExpressionSetDecisionTable

Represents a decision table or decision matrix in a step.

Field Name	Description
decisionTableName	**Field Type** string **Description** Required. The decision matrix or decision table name used in a step.
mappings	**Field Type** ExpressionSetElementParameter[] **Description** The mapping information between various parameters in an ExpressionSetDecisionTable. Available in API version 59.0 and later.
type	**Field Type** string **Description** Required. The type in a step. It can be a decision table or decision matrix.

ExpressionSetSubExpression

Represents a sub expression in a step.

Field Name	Description
expressionSet	**Field Type** string **Description** Required. The sub expression name used in a step.
mappings	**Field Type** ExpressionSetElementParameter[] **Description** The mapping information between various parameters in an ExpressionSetDecisionTable. Available in API version 61.0 and later.

ExpressionSetVariable

Represents a definition of an expression set variable.

Field Name	Description
`collection`	**Field Type** boolean **Description** Indicates whether a variable stores a collection of values (`true`) or not (`false`).
`dataType`	**Field Type** ExpsSetDataType (enumeration of type string) **Description** Required. The data type of an expression set variable. Valid values are: • `ActionOutput` • `Boolean` • `Currency` • `Date` • `DateTime` • `DecisionMatrix` • `DecisionTable` • `Numeric` • `Percent` • `Sobject` • `SubExpression` • `Text`
`decimalPlaces`	**Field Type** int **Description** The decimal digits in the currency, number, or percent data type for an expression set variable.
`description`	**Field Type** string **Description** The description of the variable used in an expression set.
`fields`	**Field Type** ExpressionSetVariableField [] **Description** Represents an array of fields in an object that is used as a variable in an expression set.

Field Name	Description
`input`	**Field Type** boolean **Description** Indicates whether an expression set variable is used as an input (`true`) in an expression or not (`false`).
`lookupName`	**Field Type** string **Description** The API name of a decision matrix, a decision table, or a sub expression.
`lookupType`	**Field Type** ExpsSetVariableLookupType (enumeration of type string) **Description** The type of the lookup used in an expression set definition. Valid values are: • `DecisionMatrix` • `DecisionTable` • `SubExpression`
`name`	**Field Type** string **Description** Required. The full name of the variable used in an expression set definition.
`objectName`	**Field Type** string **Description** The name of the sObject.
`output`	**Field Type** boolean **Description** Indicates whether an expression set variable is used as an output in an expression(`true`) or not (`false`).
`resultStep`	**Field Type** string **Description** The step that produces the expression set variable.

Field Name	Description
`type`	**Field Type** ExpsSetVariableType (enumeration of type string) **Description** Required. The type of variable in an expression set definition. Valid values are: • `Constant` • `ContextDynamicAttributeTag` (Available in API version 62.0 and later.) • `ExecutableContextDefinitionTag` (Available in API version 62.0 and later.) • `Formula` • `Variable`
`value`	**Field Type** string **Description** Represents a constant value or a formula. Note: It stores the default value of a variable.

ExpressionSetVariableField

Represents a definition of a field in an object that is used as a variable in an expression set.

Field Name	Description
`dataType`	**Field Type** ExpsSetDataType (enumeration of type string) **Description** Required. Specifies the type of data stored in an expression set variable. Valid values are: • `ActionOutput` • `Boolean` • `Currency` • `Date` • `DateTime` • `DecisionMatrix` • `DecisionTable` • `Numeric` • `Percent`

Field Name	Description
	• `Sobject` • `SubExpression` • `Text`
`decimalPlaces`	**Field Type** int **Description** The decimal digits in the currency, number, or percent data type for an expression set variable.
`fields`	**Field Type** ExpressionSetVariableField [] **Description** Represents an array of fields in an object that is used as a variable in an expression set.
`lookupName`	**Field Type** string **Description** The API name of a decision matrix, a decision table, or a sub expression.
`lookupType`	**Field Type** ExpsSetVariableLookupType (enumeration of type string) **Description** Required. The type of lookup used in an expression set definition. Valid values are: • `DecisionMatrix` • `DecisionTable` • `SubExpression`
`name`	**Field Type** string **Description** Required. The full name of the field used in an expression set variable.
`objectName`	**Field Type** string **Description** The name of the sObject.

Declarative Metadata Sample Definition

The following is an example of an ExpressionSetDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ExpressionSetDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
    <label>ExpSetWithAllSteps</label>
    <processType>Bre</processType>
    <template>false</template>
    <description></description>
    <interfaceSourceType>Sample</interfaceSourceType>
    <executionScale>Low</executionScale>
    <versions>
        <fullName>ExpSetWithAllSteps_V1</fullName>
        <expressionSetDefinition>ExpSetWithAllSteps</expressionSetDefinition>
        <label>ExpSetWithAllSteps V1</label>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <startDate>2022-08-09T22:04:56.000Z</startDate>
        <endDate>2023-08-09T22:04:56.000Z</endDate>
        <status>Draft</status>
        <uiTier>false</uiTier>
        <rank>1</rank>
        <description>ExpSetWithAllSteps_V1</description>
        <steps>
            <description>Aggregate</description>
            <actionType>BreAggregator</actionType>
            <aggregation>
                <aggergatedParameter>result</aggergatedParameter>
                <aggregateFunction>Avg</aggregateFunction>
                <expression>AVG ( result )</expression>
            </aggregation>
            <label>Aggregate</label>
            <name>Aggregate</name>
            <resultIncluded>true</resultIncluded>
            <sequenceNumber>5</sequenceNumber>
            <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
            <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
            <shouldShowExplExternally>false</shouldShowExplExternally>
            <stepType>BusinessKnowledgeModel</stepType>
        </steps>
        <steps>
            <label>Branch</label>
            <name>Branch</name>
            <resultIncluded>false</resultIncluded>
            <sequenceNumber>4</sequenceNumber>
            <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
            <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
            <shouldShowExplExternally>false</shouldShowExplExternally>
            <stepType>Branch</stepType>
        </steps>
        <steps>
            <actionType>AssignParameterValues</actionType>
            <assignment>
                <assignedParameter>b</assignedParameter>
                <expression>SUM ( a , 10 )</expression>
```

```
        </assignment>
        <label>Calculation</label>
        <name>Calculation</name>
        <resultIncluded>true</resultIncluded>
        <sequenceNumber>1</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>BusinessKnowledgeModel</stepType>
    </steps>
    <steps>
        <actionType>AssignParameterValues</actionType>
        <assignment>
            <assignedParameter>result</assignedParameter>
            <expression>b * 100</expression>
        </assignment>
        <label>Calculation</label>
        <name>Calculation10</name>
        <parentStep>DefaultLane</parentStep>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>1</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>BusinessKnowledgeModel</stepType>
    </steps>
    <steps>
        <actionType>AssignParameterValues</actionType>
        <assignment>
            <assignedParameter>result</assignedParameter>
            <expression>b * 1</expression>
        </assignment>
        <label>Calculation</label>
        <name>Calculation3</name>
        <parentStep>Condition</parentStep>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>1</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>BusinessKnowledgeModel</stepType>
    </steps>
    <steps>
        <actionType>AssignParameterValues</actionType>
        <assignment>
            <assignedParameter>result</assignedParameter>
            <expression>SUM ( b , 10 )</expression>
        </assignment>
        <label>Calculation</label>
        <name>Calculation5</name>
        <parentStep>Condition4</parentStep>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>1</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
```

```
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>BusinessKnowledgeModel</stepType>
    </steps>
    <steps>
        <actionType>AssignParameterValues</actionType>
        <assignment>
            <assignedParameter>result</assignedParameter>
            <expression>b * 10</expression>
        </assignment>
        <label>Calculation</label>
        <name>Calculation8</name>
        <parentStep>Condition7</parentStep>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>1</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>BusinessKnowledgeModel</stepType>
    </steps>
    <steps>
        <conditionExpression>
            <successMessage>success</successMessage>
            <errorMessage>error</errorMessage>
            <expression>IS10 == b</expression>
            <resultParameter>condition_output__1</resultParameter>
        </conditionExpression>
        <label>Condition</label>
        <name>Condition</name>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>2</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>Condition</stepType>
    </steps>
    <steps>
        <advancedCondition>
            <successMessage>success</successMessage>
            <errorMessage>error</errorMessage>
            <conditionLogic>1</conditionLogic>
            <criteria>
                <operator>Equals</operator>
                <sequenceNumber>1</sequenceNumber>
                <sourceFieldName>condition_output__1</sourceFieldName>
                <value>true</value>
                <valueType>Literal</valueType>
            </criteria>
            <resultParameter>condition_output__3</resultParameter>
        </advancedCondition>
        <label>Condition</label>
        <name>Condition4</name>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>3</sequenceNumber>
```

```
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>AdvancedCondition</stepType>
    </steps>
    <steps>
        <conditionExpression>
            <expression>IS10 == b</expression>
            <resultParameter>condition_output__2</resultParameter>
        </conditionExpression>
        <label>Condition</label>
        <name>Condition7</name>
        <parentStep>Branch</parentStep>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>1</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>Condition</stepType>
    </steps>
    <steps>
        <label>Default Lane</label>
        <name>DefaultLane</name>
        <parentStep>Branch</parentStep>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>2</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>false</shouldShowExplExternally>
        <stepType>DefaultPath</stepType>
    </steps>
    <steps>
        <actionType>AssignParameterValues</actionType>
        <assignment>
            <assignedParameter>a</assignedParameter>
            <expression>3</expression>
        </assignment>
        <failedExplainerTemplate>CalculationFailure</failedExplainerTemplate>
        <failedMessageTokenMappings>
            <expressionSetMessageToken>y2</expressionSetMessageToken>
            <resourceReference>a</resourceReference>
        </failedMessageTokenMappings>
        <label>CalculationStepWithTokensAndMappings</label>
        <name>CalculationStepWithTokensAndMappings</name>
        <passedExplainerTemplate>CalculationSuccess</passedExplainerTemplate>
        <passedMessageTokenMappings>
            <expressionSetMessageToken>y1</expressionSetMessageToken>
            <resourceReference>a</resourceReference>
        </passedMessageTokenMappings>
        <resultIncluded>false</resultIncluded>
        <sequenceNumber>1</sequenceNumber>
        <shouldExposExecPathMsgOnly>true</shouldExposExecPathMsgOnly>
        <shouldExposeConditionDetails>false</shouldExposeConditionDetails>
        <shouldShowExplExternally>true</shouldShowExplExternally>
```

```
        <stepType>BusinessKnowledgeModel</stepType>
    </steps>
    <variables>
        <collection>false</collection>
        <dataType>Boolean</dataType>
        <description>condition_output__3</description>
        <input>false</input>
        <name>condition_output__3</name>
        <output>false</output>
        <resultStep>Condition4</resultStep>
        <type>Variable</type>
        <value>False</value>
    </variables>
    <variables>
        <collection>false</collection>
        <dataType>Numeric</dataType>
        <decimalPlaces>2</decimalPlaces>
        <description>a</description>
        <input>true</input>
        <name>a</name>
        <output>false</output>
        <type>Variable</type>
        <value>10</value>
    </variables>
    <variables>
        <collection>false</collection>
        <dataType>Boolean</dataType>
        <description>condition_output__1</description>
        <input>false</input>
        <name>condition_output__1</name>
        <output>false</output>
        <resultStep>Condition</resultStep>
        <type>Variable</type>
        <value>False</value>
    </variables>
    <variables>
        <collection>false</collection>
        <dataType>Boolean</dataType>
        <description>condition_output__2</description>
        <input>false</input>
        <name>condition_output__2</name>
        <output>false</output>
        <resultStep>Condition7</resultStep>
        <type>Variable</type>
        <value>False</value>
    </variables>
    <variables>
        <collection>false</collection>
        <dataType>Numeric</dataType>
        <decimalPlaces>2</decimalPlaces>
        <description>IS10</description>
        <input>false</input>
        <name>IS10</name>
        <output>false</output>
```

```
            <type>Constant</type>
            <value>10</value>
        </variables>
        <variables>
            <collection>false</collection>
            <dataType>Numeric</dataType>
            <decimalPlaces>2</decimalPlaces>
            <description>b</description>
            <input>false</input>
            <name>b</name>
            <output>true</output>
            <type>Variable</type>
        </variables>
        <variables>
            <collection>false</collection>
            <dataType>Numeric</dataType>
            <decimalPlaces>2</decimalPlaces>
            <description>result</description>
            <input>false</input>
            <name>result</name>
            <output>true</output>
            <type>Variable</type>
        </variables>
        <versionNumber>1</versionNumber>
    </versions>
</ExpressionSetDefinition>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>*</members>
  <name>ExpressionSetDefinition</name>
 </types>
 <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

ExpressionSetMessageToken

Represents an interface to retrieve, deploy, create, update, or delete information on Expression Set Message Token.

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

ExpressionSetMessageToken components have the suffix `expressionSetMessageToken` and are stored in the `ExpressionSetMessageToken` folder.

Version

ExpressionSetMessageToken components are available in API version 59.0 and later.

Special Access Rules

InteractionCalculation.orgHasBREandDESAccess Org permission set license is required for users to access this metadata type.

Fields

Field Name	Description
`description`	**Field Type** string **Description** Required. Description of the expression set message token.
`developerName`	**Field Type** string **Description** Required. Developer name of the expression set message token.
`masterLabel`	**Field Type** string **Description** Required. A user-friendly name for ExpressionSetMessageToken, which is defined when the ExpressionSetMessageToken is created.

Declarative Metadata Sample Definition

The following is an example of an ExpressionSetMessageToken component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ExpressionSetMessageToken xmlns="http://soap.sforce.com/2006/04/metadata">
    <developerName>token</developerName>
    <description>Description</description>
    <masterLabel>token</masterLabel>
</ExpressionSetMessageToken>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>ExpressionSetMessageToken</name>
    </types>
    <version>59.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

ExpressionSetObjectAlias

Represents information about the alias of the source object that's used in an expression set.

Parent Type

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

File Suffix and Directory Location

ExpressionSetObjectAlias components have the suffix `.expressionSetObjectAlias` and are stored in the `expressionSetObjectAlias` folder.

Version

ExpressionSetObjectAlias components are available in API version 56.0 and later.

Fields

Field Name	Description
`dataType`	**Field Type** ExpsSetObjectDataType (enumeration of type string)

Field Name	Description
	Description Required. The data type of the object alias. Values are: • `JSON` • `sObject`
`mappings`	**Field Type** ExpressionSetObjectAliasField[] **Description** The mapping between a source field and its corresponding field alias.
`objectApiName`	**Field Type** string **Description** Required. The API name of the top-level object, when the data type is sObject. The key of the top-level object, when the data type is JSON.
`usageType`	**Field Type** ExpsSetProcessType (enumeration of type string) **Description** Required. The type of application associated with the industry that's using an expression set. Your Salesforce org admin can define the values. Valid values are: • `Bre` • Note: When Business Rules Engine is enabled for a Salesforce instance, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets.

ExpressionSetObjectAliasField

The fields associated with the source object for which the object alias is created.

Field Name	Description
`fieldAlias`	**Field Type** string

Field Name	Description
	Description Required. The field alias associated with the source field name.
sourceFieldName	**Field Type** string **Description** Required. The name of the source field for which the field alias is created. The source field name under an object alias must be unique.

Declarative Metadata Sample Definition

The following is an example of an ExpressionSetObjectAlias component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ExpressionSetObjectAlias xmlns="http://soap.sforce.com/2006/04/metadata">
    <dataType>sObject</dataType>
    <mappings>
        <fieldAlias>dum2</fieldAlias>
        <sourceFieldName>CreatedBy.Contact.Name</sourceFieldName>
    </mappings>
    <mappings>
        <fieldAlias>dum3</fieldAlias>
        <sourceFieldName>CreatedBy.Name</sourceFieldName>
    </mappings>
    <mappings>
        <fieldAlias>dum1</fieldAlias>
        <sourceFieldName>Owner.Contact.Name</sourceFieldName>
    </mappings>
    <objectApiName>Account</objectApiName>
    <usageType>Bre</usageType>
</ExpressionSetObjectAlias>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>*</members>
  <name>ExpressionSetObjectAlias</name>
 </types>
 <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Flow for Expression Set

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

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

Field Name	Field Type	Description
`actionType`	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Expression Set include: • `runExpressionSet`—Invoke an active expression set. This value is available in API version 55.0 and later.

Expression Set 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.

EDITIONS

Available in: Lightning Experience

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

ExpressionSetDefinition
Represents information about an expression set definition. This object is available in API version 55.0 and later.

ExpressionSetDefinitionVersion
Represents information about an expression set definition version. This object is available in API version 55.0 and later.

ExpressionSetObjectAlias
Represents the alias of the source object that's used in an expression set. This object is available in API version 56.0 and later.

SEE ALSO:

Developer Guide: Introducing Tooling API

ExpressionSetDefinition

Represents information about an expression set definition. This object is available in API version 55.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the expression set definition.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** Full name of the associated metadata 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.
`ExecutionScale`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the scale of the input that an expression set processes. The scale determines where the expression set is executed. Possible values are: • `High` • `Low`
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language in which the expression set definition is created.

Field	Details
	Possible values are: • da—Danish • de—German • en_US—English • es—Spanish • es_MX—Spanish (Mexico) • fi—Finnish • fr—French • it—Italian • ja—Japanese • ko—Korean • nl_NL—Dutch • no—Norwegian • pt_BR—Portuguese (Brazil) • ru—Russian • sv—Swedish • th—Thai • zh_CN—Chinese (Simplified) • zh_TW—Chinese (Traditional)
ManageableState	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • beta—Managed-Beta • deleted—Managed-Proposed-Deleted • deprecated—Managed-Proposed-Deprecated • deprecatedEditable—SecondGen-Installed-Deprecated • installed—Managed-Installed • installedEditable—SecondGen-Installed-Editable • released—Managed-Released • unmanaged—Unmanaged
MasterLabel	**Type** string

Field	Details
	Properties Filter, Group, Sort **Description** The label of the expression set definition.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Expression set definition metadata.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

ExpressionSetDefinitionVersion

Represents information about an expression set definition version. This object is available in API version 55.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the expression set definition version.

Field	Details
`ExpressionSetDefinitionId`	**Type** reference **Properties** Filter, Group, Sort **Description** The expression set definition record associated with this expression set definition version. This field is a relationship field. **Relationship Name** ExpressionSetDefinition **Relationship Type** Lookup **Refers To** ExpressionSetDefinition
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** Full name of the associated metadata 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`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language in which this expression set definition version is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean

Field	Details
	• `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label of the expression set definition version.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Expression set definition version metadata.

Field	Details
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.
`Status`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the status of the expression set definition version. Possible values are: • `Active` • `Draft` • `Inactive` • `InvalidDraft` • `Obsolete` The default value is `Draft`.
`VersionNumber`	**Type** int **Properties** Filter, Group, Sort **Description** The version number of the expression set definition version. This is a required field.

ExpressionSetObjectAlias

Represents the alias of the source object that's used in an expression set. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

To use this object, users must have the Modify All Data permission, and the orgHasExpressionSet org permission.

Fields

Field	Details
`DataType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Restricted picklist, Sort **Description** Specifies the data type of the object alias. This is a required field. Possible values are: • `JSON` • `sObject` The default value is `sObject`.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the expression set object alias.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** The name of the expression set object alias.
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language in which the expression set object alias is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English

Field	Details
	• `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)
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label of the expression set object alias.

Field	Details
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Expression set object alias metadata.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.
`ObjectAlias`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The alias that corresponds to the source object that's used in an expression set. In the context of an expression set, this alias in a group that contains the aliases of fields from the source object. The length of the object alias can't exceed 40 characters. This is a required field.
`ObjectApiName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The API name of the source object associated with the alias that's being used in an expression set.
`UsageType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of application associated with the industry that's using an expression set. Possible values are: • `Bre`–Default

Field	Details
	When Business Rules Engine is enabled for a Salesforce org, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets.

Decision Table

A decision table provides outcomes for one or more fields of a standard or custom object based on the business rules that you define. The business rules can be part of a standard or custom object, or a custom metadata type.

Information about decision tables are contained in Tooling API objects. Tooling API objects let you interact with metadata for declarative development. For example, you can create your own version of Setup.

EDITIONS

Available in: Lightning Experience

Available in: Decision Table is available with Enterprise, Unlimited, and Performance Editions with Loyalty Management or Rebate Management

Decision Table Tooling API Objects

Use Tooling API objects to create, update, and activate decision tables. Dataset links can also be created and associated with decision tables using Tooling API objects.

Apex Reference

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

Decision Table APIs

Decision table APIs are RESTful APIs that are sometimes available as Apex classes and methods.

Decision Table Metadata API

You can create, edit, and activate a decision table using a Metadata API.

Decision Table Invocable Actions

Invoke a decision table or refresh business rules for an active decision table. For more information on standard and custom invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

Decision Table Tooling API Objects

Use Tooling API objects to create, update, and activate decision tables. Dataset links can also be created and associated with decision tables using Tooling API objects.

EDITIONS

Available in: Lightning Experience

Available in: Decision Table is available with Enterprise, Unlimited, and Performance Editions with Loyalty Management or Rebate Management

Decision Table Data Model

Before you start using the Decision Table Tooling API objects, here's a representation of the data model.

DecisionTable

Represents the information about a decision table. This object is available in API version 51.0 and later.

DecisionTableDatasetLink

Represents a dataset link associated with a decision table. Use dataset links in a decision table to select an object whose records the decision table must evaluate and provide outcomes for. This object is available in API version 51.0 and later.

DecisionTableParameter

Represents an input or output field in a decision table. An input field is a field in the business rule object or custom metadata type that contains values used by the decision table to evaluate records and values. An output field is a field in the business rule object or custom metadata type that contains the values provided as outcomes for a rule. This object is available in API version 51.0 and later.

DecisionTblDatasetParameter

Represents the mapping between a decision table parameter and a field of the object selected in the dataset link. This mapping allows the decision table to know which object fields from the dataset link must be evaluated by the input fields of the decision table. This object is available in API version 51.0 and later.

Decision Table Data Model

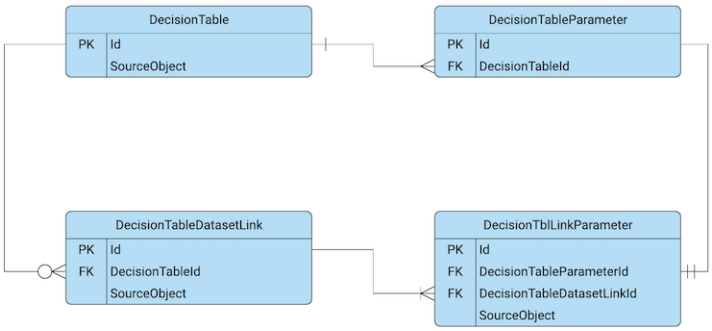
Before you start using the Decision Table Tooling API objects, here's a representation of the data model.

EDITIONS

Available in: Lightning Experience

Available in: Decision Table is available with Enterprise, Unlimited, and Performance Editions with Loyalty Management or Rebate Management

Decision Table



DecisionTable

Represents the information about a decision table. This object is available in API version 51.0 and later.

Note: 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`

Fields

Field	Details
`CollectOperator`	**Type** string

Field	Details
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** For internal use only.
`ConditionCriteria`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Custom logic that's used to decide how the input fields are processed.
`ConditionType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Condition logic that's used for input fields. Possible values are: • `All`—All conditions are met (AND) • `Any`—Any condition is met (OR) • `Custom`—Custom Logic The default value is 'All'.
`DataSourceType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Type of data source that's used to create a decision table. Available in API version 59.0 and later. Valid values are: • `MultipleSobjects`—Multiple sObjects • `SingleSobject`—Single sObject The default value is `SingleSobject`.
`DecisionTableParameters`	**Type** QueryResult **Properties** Nillable

Field	Details
	Description Input or output field in a decision table.
`DecisionTableSourceCriterias`	**Type** QueryResult **Properties** Nillable **Description** Filter criteria that's associated with the decision table condition. Available in API version 59.0 and later.
`Description`	**Type** textarea **Properties** Filter, Nillable, Sort **Description** Description of the decision table.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** Developer name of the decision table.
`DoesConsiderNullValue`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Nillable, Sort **Description** Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`). The default value is `false`. Available in API version 60.0 and later.
`FilterResultBy`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** If a collection of inputs returns multiple matching outputs, then the `FilterResultBy` field specifies how the results of a decision table are filtered. Available in API version 59.0 and later.

Field	Details
	Valid values are: • `AnyValue`—Any Value • `FirstMatch`—First Match • `OutputOrder`—Output Order
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** Name of the decision table. 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`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Language in which the decision table is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified)

Field	Details
	• `zh_TW`—Chinese (Traditional)
`LastSyncDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Latest date on which the decision table was refreshed.
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label of the decision table.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Metadata of the decision table. 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.

Field	Details
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix that's associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values. • In Developer Edition orgs, `NamespacePrefix` is set to the namespace prefix of the org for all objects that support it, unless 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 org of the package developer. • In orgs that aren't Developer Edition orgs, `NamespacePrefix` is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
`PricingElementDecisionTables`	**Type** QueryResult **Properties** Nillable **Description** Reserved for future use.
`RefreshFailureReason`	**Type** string **Properties** Filter, Nillable, Sort **Description** Reason for the refresh of the decision table data to fail. Available in API version 60.0 and later.
`RefreshStatus`	**Type** string **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Refresh status of the cached data in the decision table. Available in API version 60.0 and later. Valid values are: • `Initiated`

Field	Details
	• `Failed` • `Completed` • `In Progress`
`SetupName`	**Type** string **Properties** Filter, Group, Sort **Description** Required. Name of the decision table, which appears in Setup.
`SourceConditionLogic`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Condition logic that's used to define the decision table from the source data. Available in API version 59.0 and later.
`SourceObject`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Required. Object that contains the rules based on which the decision table must provide outcomes.
`Status`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Required. Status of the decision table. Valid values are: • `ActivationInProgress` • `Active` • `Draft` • `Inactive`
`Type`	**Type** picklist

Field	Details
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Determine whether a decision table's data volume is high or low. Available in API version 59.0 and later. Valid values are: • `HighVolume`–Reserved for future use • `LowVolume` • `HighScaleExecution` The default value is `LowVolume`.
`UsageType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Usage type of the decision table. Available in API version 59.0 and later. Valid value is `Bre`. The default value is `Bre`. When Business Rules Engine is enabled for a Salesforce org, the default value is `Bre`. Other usage types may be available to you depending on your industry solution and permission sets.

DecisionTableDatasetLink

Represents a dataset link associated with a decision table. Use dataset links in a decision table to select an object whose records the decision table must evaluate and provide outcomes for. This object is available in API version 51.0 and later.

Note: 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`

Fields

Field	Details
DecisionTableId	**Type** reference **Properties** Filter, Group, Sort **Description** Required. The unique identifier of the associated decision table. This is a relationship field. **Relationship Name** DecisionTable **Relationship Type** Lookup **Refers To** DecisionTable
Description	**Type** textarea **Properties** Filter, Nillable, Sort **Description** The description of the dataset link.
DeveloperName	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the dataset link.
FullName	**Type** string **Properties** Create, Group, Nillable **Description** The name of the decision table dataset link. 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.
IsDefault	**Type** boolean

Field	Details
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates whether a dataset link is the default dataset link for a decision table.
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language in which the dataset link is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted`

Field	Details
	• `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label of the dataset link.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Decision table dataset link metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values. • In Developer Edition orgs, `NamespacePrefix` is set to the namespace prefix of the org for all objects that support it, unless 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 org of the package developer. • In orgs that are not Developer Edition orgs, `NamespacePrefix` is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.

Field	Details
SetupName	**Type** string **Properties** Filter, Group, Sort **Description** Required. The name of the dataset link, which appears in Setup.
SourceObject	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the dataset link's source object.

DecisionTableParameter

Represents an input or output field in a decision table. An input field is a field in the business rule object or custom metadata type that contains values used by the decision table to evaluate records and values. An output field is a field in the business rule object or custom metadata type that contains the values provided as outcomes for a rule. This object is available in API version 51.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
DecisionTableId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The unique identifier of the associated decision table. This is a relationship field. **Relationship Name** DecisionTable

Field	Details
	Relationship Type Lookup **Refers To** DecisionTable
`DomainObject`	**Type** string **Properties** Create, Filter, Group, Sort **Description** For polymorhpic fields, indicates the domain object in the field hierarchy. This field is available in API version 59.0 and later.
`FieldName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the field that's selected as an input or output for the decision table.
`FieldPath`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The path of the field used in a decision table in relation to the object that the field belongs to. This field is available in API version 59.0 and later.
`IsGroupByField`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether an input field is used to group the business rules of the decision table (`true`) or not (`false`). The default value is `false`'. This field is available in API version 55.0 and later.
`IsRequired`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a field is required to have input values when a look up is performed on the decision table (`true`) or not (`false`). The default value is `false`'. This field is available in API version 59.0 and later.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`Operator`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The operator used for the input field. Possible values are: • `DoesNotExistsIn` • `Contains` • `Equals` • `ExistsIn` • `GreaterOrEqual` • `GreaterThan` • `LessOrEqual` • `LessThan`

Field	Details
	• `Matches` • `DoesNotMatch` • `NotEquals`
`Sequence`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence in which input fields are processed.
`SortType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Sort outputs of a decision table based on the values of the input or output parameter field. This field is available in API version 56.0 and later. Possible values are: • `AscNullFirst` • `AscNullLast` • `DescNullFirst` • `DescNullLast` • `None` The default value is `None`. Outputs can't be sorted based on picklist and multi-select picklist fields.
`Usage`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. The usage type of a field. Possible values are: • `INPUT` • `OUTPUT`

DecisionTblDatasetParameter

Represents the mapping between a decision table parameter and a field of the object selected in the dataset link. This mapping allows the decision table to know which object fields from the dataset link must be evaluated by the input fields of the decision table. This object is available in API version 51.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DatasetFieldName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Required. The name of the field whose value must be compared against an input type decision table parameter when providing the outcome.
`DatasetSourceObject`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The object whose field values are evaluated by the associated decision table to provide outcomes.
`DecisionTableDatasetLinkId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The unique identifier of the associated decision table dataset link. This is a relationship field. **Relationship Name** DecisionTableDatasetLink **Relationship Type** Lookup

Field	Details
	Refers To DecisionTableDatasetLink
`DecisionTableParameterId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The unique identifier of the associated decision table parameter. This is a relationship field. **Relationship Name** DecisionTableParameter **Relationship Type** Lookup **Refers To** DecisionTableParameter
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`

Apex Reference

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

For Apex-related SOAP API calls, see Apex-Related Calls in the *SOAP API Developer Guide*. For Apex-related objects, see Standard Objects in the *Salesforce Object Reference*.

DecisionTable Methods

This is a `DecisionTable` method.

Input Classes
These are Decision Table Apex input classes.

Output Classes
These are Decision Table Apex output classes.

DecisionTable Methods

This is a `DecisionTable` method.

execute(decisionTableId, DecisionTableInput)
Execute an active decision table.

`execute(decisionTableId, DecisionTableInput)`

Execute an active decision table.

API Version

51.0

Requires Chatter

No

Signature

```
public static ConnectApi.DecisionTableOutcome execute(String decisionTableId,
ConnectApi.DecisionTableInput DecisionTableInput)
```

Parameters

`decisionTableId`
Type: String

ID of the decision table.

`DecisionTableInput`
Type: `ConnectApi.DecisionTableInput`

A `ConnectApi.DecisionTableInput` object with a list of conditions.

Return Value

Type: `ConnectApi.DecisionTableOutcome`

Example

```
ConnectApi.DecisionTableInput input = new ConnectApi.DecisionTableInput();
input.datasetLinkName = 'DSL1';//Optional,if you want to use a dataset link mapping
definition
```

```
input.conditions = new List<ConnectApi.DecisionTableCondition>();
ConnectApi.DecisionTableCondition condition = new ConnectApi.DecisionTableCondition();
condition.fieldName = 'Brand__c';
condition.value = 'Cloud Kicks';
input.conditions.add(condition);
ConnectApi.DecisionTableOutcome output = ConnectApi.DecisionTable.execute('01Dxxxj23444',
 input);
```

Input Classes

These are Decision Table Apex input classes.

ConnectApi.DecisionTableInput
Input representation of the decision table.

ConnectApi.DecisionTableCondition
Input representation of the decision table condition.

ConnectApi.DecisionTableInput

Input representation of the decision table.

Property	Type	Description	Required or Optional	Available Version
conditions	List<ConnectApi.DecisionTableCondition>	List of decision table conditions on which the decision table executes.	Required	51.0
datasetLinkName	String	The API name of the dataset link provided as an input for the decision table execution.	Optional	51.0

ConnectApi.DecisionTableCondition

Input representation of the decision table condition.

Property	Type	Description	Required or Optional	Available Version
fieldName	String	The field name that is selected as an input for the decision table.	Required	51.0
operator	String	The operator used for the input field. Valid values are: • DoesNotExistIn—Use to check if the input value doesn't exist in a multi-select picklist. • Equals—Use to check if the input value equals to the configured value in the rule.	Optional	51.0

Property	Type	Description	Required or Optional	Available Version
		• `ExistsIn`—Use to check if the input value exists in a multi-select picklist. • `GreaterOrEqual`—Use to check if the input value is greater than or equal to the configured value in the rule. • `GreaterThan`—Use to check if the input value is greater than the configured value in the rule. • `LessOrEqual`—Use to check if the input value is less than or equal to the configured value in the rule. • `LessThan`—Use to check if the input value is less than the configured value in the rule. • `Matches`—Use to check if the input value is a substring of the value in the rule. • `NotEquals`—Use to check if the input value doesn't equal to the configured value in the rule. Note: The operator specified here overrides the operator defined in Decision Table.		
`sourceObject`	String	The name of source object for the input field. The source object field is not mandatory if the dataset link is configured with a single source object. Note: The source object field is required only when the dataset link definition contains multiple source objects.	Optional	52.0
`value`	Object	The value of the data type that is selected as an input.	Required	51.0

Output Classes

These are Decision Table Apex output classes.

ConnectApi.DecisionTableOutcome

Output representation of the decision table execution.

ConnectApi.DecisionTableOutcomeItem

Output representation of the decision table outcome item.

ConnectApi.DecisionTableOutcome

Output representation of the decision table execution.

Property Name	Type	Description	Available Version
`errorCode`	Integer	The error code if transaction fails for any reason.	51.0
`errorMessage`	String	The error message if transaction fails for any reason.	51.0
`outcomeList`	List<`ConnectApi.DecisionTableOutcomeItem`>	The outcome list that stores two or more outcomes provided by the decision table. Note: A decision table that is invoked by the Decision Table custom invocable action can provide up to 50 outcomes.	51.0
`outcomeType`	String	The outcome type after the request is successful. Valid values are: • `MultipleMatch`—Outcome returns multiple matches. • `NoMatch`—Outcome returns no match. • `SingleMatch`—Outcome returns single match.	51.0
`successStatus`	Boolean	Indicates the status of the decision table execution.	51.0

ConnectApi.DecisionTableOutcomeItem

Output representation of the decision table outcome item.

Property Name	Type	Description	Available Version
`values`	Map<String, Object>	The list of outcomes provided by the decision table. If the decision table is configured to sort outcomes based on an input field or the output field, then the outcomes are provided based on the selected sort order.	51.0

Decision Table APIs

Decision table APIs are RESTful APIs that are sometimes available as Apex classes and methods.

REST Reference

You can access Decision Table APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

REST Reference

You can access Decision Table 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 Decision Table API resources.

Request Bodies
Here's a list of Decision Table API request bodies.

Response Bodies
Here's a list of Decision Table API response bodies.

Resources

Here's a list of Decision Table API resources.

CSV Based Decision Table (GET)
Fetch paginated data from a CSV based decision table. This resource is responsible for managing rows in a Decision Table.

Decision Table Execution
Execute an active decision table.

CSV Based Decision Table (GET)

Fetch paginated data from a CSV based decision table. This resource is responsible for managing rows in a Decision Table.

Resource

```
/connect/business-rules/decision-table/${decisionTableId}/data
```

Example for GET

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/decision-table/01Dxx0000000001EAA/data?filter=AssetLevel:101
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/decision-table/01Dxx0000000001EAA/data
```

Available version
62.0

HTTP methods
GET POST

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`filter`	String	Filters applied to rows based on column criteria.	Optional	62.0

Parameter Name	Type	Description	Required or Optional	Available Version
`limit`	Integer	Limits the number of records viewed at a time. The default value is `20`.	Optional	62.0
`offset`	Integer	Token that represents the page offset for pagination. Use this value with the `pageSize` parameter to indicate where the page starts. The maximum offset is `100` and the default is `0`.	Optional	62.0

Response body for GET

Decision Table Rows List

Request body for POST

JSON example

```
{
  "rows": [
    {
      "id": "1FIxx0000004CSOGA2",
      "rowData": {
        "City": "City3",
        "AssetLevel": "300"
      },
      "action": "update"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`rows`	Decision Table Row Input[]	List of rows to be updated or added.	Required	62.0

Request parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
`rowsInput`	Object			62.0

Response body for POST

Decision Table Data

Decision Table Execution

Execute an active decision table.

Resource

```
services/data/vXX.X/connect/business-rules/decision-table/lookup/${decisionTableId}
```

Available version

51.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
   "conditions":[
      {
         "conditionsList":[
            {
               "fieldName":"Product__c",
               "value":"Nike",
               "operator":"Matches"
            },
            {
               "fieldName":"Price__c",
               "value":1000,
               "operator":"GreaterThan"
            }
         ]
      },
      {
         "conditionsList":[
            {
               "fieldName":"Product__c",
               "value":"Adidas",
               "operator":"Matches"
            },
            {
               "fieldName":"Price__c",
               "value":1500,
               "operator":"GreaterThan"
            }
         ]
      }
   ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
conditions	Decision Table Condition[]	The list of decision table conditions on which the decision table executes and provides outcomes.	Required	55.0
datasetLinkName	String	The API name of the dataset link provided as an input for the decision table execution.	Optional	55.0

Response body for POST

Decision Table Outcome

Sample Response body

```
{
   "outcomeType" : "Single Match",
   "outcomeList" : [
      {
         "values" : {
            "Discount_c": 5
         }
      }
   ]
}
```

Request Bodies

Here's a list of Decision Table API request bodies.

Decision Table Input

Input representation of a decision table.

Decision Table Condition Input

Input representation of the decision table condition.

Decision Table Row List Input

Input representation of the data for a row in the CSV based decision table that has to be added or updated.

Decision Table Rows List Input

Input representation of the request to update rows in a CSV based decision table.

Decision Table Input

Input representation of a decision table.

JSON example

```
{
   "conditions":[
      {
         "conditionsList":[
            {
               "fieldName":"Product__c",
               "value":"Nike",
               "operator":"Matches"
            },
            {
               "fieldName":"Price__c",
               "value":1000,
               "operator":"GreaterThan"
            }
         ]
      },
      {
         "conditionsList":[
            {
               "fieldName":"Product__c",
               "value":"Adidas",
               "operator":"Matches"
            },
            {
               "fieldName":"Price__c",
               "value":1500,
               "operator":"GreaterThan"
            }
         ]
      }
   ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
conditions	Decision Table Condition[]	The list of decision table conditions on which the decision table executes and provides outcomes.	Required	55.0
datasetLinkName	String	The API name of the dataset link provided as an input for the decision table execution.	Optional	55.0

Decision Table Condition Input

Input representation of the decision table condition.

Properties

Name	Type	Description	Required or Optional	Available Version
`fieldName`	String	The field name that is selected as an input for the decision table.	Required	55.0
`value`	String	The value of the data type that is selected as an input. Specify the value of a decision table's group-by field in double quotes, which is also applicable for numeric or integer type fields. For example, specify `"value": "1000"` for a Price numeric type field, and `"value" : "102.0"` for a Number integer type field.	Required	55.0
`operator`	String	The operator used for the input field. Valid values are: • `DoesNotExistIn`—Use to check if the input value doesn't exist in a multi-select picklist. • `Equals`—Use to check if the input value equals to the configured value in the rule. • `ExistsIn`—Use to check if the input value exists in a multi-select picklist. • `GreaterOrEqual`—Use to check if the input value is greater than or equal to the configured value in the rule. • `GreaterThan`—Use to check if the input value is greater than the configured value in the rule. • `LessOrEqual`—Use to check if the input value is less than or equal to the configured value in the rule. • `LessThan`—Use to check if the input value is less than the configured value in the rule. • `Matches`—Use to check if the input value is a substring of the value in the rule.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		• `NotEquals`—Use to check if the input value doesn't equal to the configured value in the rule. Note: The operator specified here overrides the operator defined in Decision Table.		
`sourceObject`	String	The name of the source object for the input field. If the dataset link is configured with a single source object, the source object field isn't mandatory.	Optional Note: This field is required only when the dataset link definition contains multiple source objects.	55.0

SEE ALSO:

Supported Data Types and Operators

Decision Table Row List Input

Input representation of the data for a row in the CSV based decision table that has to be added or updated.

JSON example

```
{
  "id": "1FIxx0000004CSOGA2",
  "rowData": {
    "City": "City3",
    "AssetLevel": "300"
  },
  "action": "update"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`action`	String	Action to perform on this row. Valid values are: • `Create` • `Update`	Optional	62.0

Name	Type	Description	Required or Optional	Available Version
id	String	ID of the decision table tow.	Optional	62.0
rowdata	Map<String, Object>	Key value pair of the decision table row.	Required	62.0

Decision Table Rows List Input

Input representation of the request to update rows in a CSV based decision table.

JSON example

```
{
  "rows": [
    {
      "id": "1FIxx0000004CSOGA2",
      "rowData": {
        "City": "City3",
        "AssetLevel": "300"
      },
      "action": "update"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
rows	Decision Table Row Input[]	List of rows to be updated or added.	Required	62.0

Response Bodies

Here's a list of Decision Table API response bodies.

Decision Table Data
Output representation of the status of an action performed.

Decision Table Outcome
Output representation of the decision table execution.

Decision Table Outcome Item
Output representation of the decision table outcome item.

Decision Table Row
Output representation to describe the output of a decision table row.

Decision Table Rows List
Output representation of the rows in relation to the decision table, including current state of pagination.

Decision Table Data

Output representation of the status of an action performed.

Sample Output

```
{
  "errors": [],
  "errorFileId": "string_value"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorFileId	String	Error code if transaction failed for any reason.	Small, 62.0	62.0
errors	String[]	List of error messages if transaction failed for any reason.	Small, 62.0	62.0

Decision Table Outcome

Output representation of the decision table execution.

JSON example

```
{
  "errorCode" : null,
  "errorMessage" : null,
  "outcomeList" : [ {
    "values" : {
      "amount__c" : "399",
      "Name" : "MH 005"
    }
  }, {
    "values" : {
      "amount__c" : "499",
      "Name" : "MH 006"
    }
  }, {
    "values" : {
      "amount__c" : "379",
      "Name" : "MH 007"
    }
  }, {
    "values" : {
      "amount__c" : "1498",
      "Name" : "MH 008"
    }
  }, {
    "values" : {
      "amount__c" : "98",
      "Name" : "MH 009"
    }
  }, {
```

```
    "values" : {
      "amount__c" : "251",
      "Name" : "MH 010"
    }
  } ],
  "outcomeType" : "Multiple Matches",
  "successStatus" : true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	Integer	The error code if transaction fails for any reason.	Small, 55.0	55.0
errorMessage	String	The error message if transaction fails for any reason.	Small, 55.0	55.0
outcomeList	Decision Table Outcome Item[]	Outcome list that stores two or more outcomes provided by the decision table.	Small, 55.0	55.0
outcomeType	String	The outcome type after the request is successful.	Small, 55.0	55.0
successStatus	Boolean	Indicates the status of the decision table execution.	Small, 55.0	55.0

Decision Table Outcome Item

Output representation of the decision table outcome item.

Property Name	Type	Description	Filter Group and Version	Available Version
values	Map<String, Object>	The list of outcomes provided by the decision table. If the decision table is configured to sort outcomes based on an input field or the output field, then the outcomes are provided based on the selected sort order.	Small, 55.0	55.0

Decision Table Row

Output representation to describe the output of a decision table row.

Sample Output

```
{
  "rows": {
    "id": "1FIxx0000004CCG",
    "rowData": {
      "AssetLevel": "101",
      "City": "city1"
```

```
      }
    }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the decision table row.	Small, 62.0	62.0
rowData	Map<String, Object>	Key value pair of the decision table row.	Small, 62.0	62.0

Decision Table Rows List

Output representation of the rows in relation to the decision table, including current state of pagination.

Sample Output

```
{
  "rows": [
    {
      "id": "1FIxx0000004CCG",
      "rowData": {
        "AssetLevel": "101",
        "City": "city1"
      }
    }
  ],
  "totalRows": 3
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
rows	Decision Table Row[]	List of rows returned in response to the API request.	Small, 62.0	62.0
totalRows	Integer	Total number of rows.	Small, 62.0	62.0

Decision Table Metadata API

You can create, edit, and activate a decision table using a Metadata API.

DecisionTable
Represents the information about a decision table.

DecisionTableDatasetLink
Represents the information about a dataset link associated with a decision table. In a dataset link, select an object for whose records, the decision table must provide an outcome.This type extends the Metadata metadata type and inherits its `fullName` field.

EDITIONS

Available in: Lightning Experience

Available in: Decision Table is available with Enterprise, Unlimited, and Performance Editions with Loyalty Management or Rebate Management

DecisionTable

Represents the information about a decision table.

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

DecisionTable components have the suffix `.decisionTable` and are stored in the `decisionTables` folder.

Version

DecisionTable components are available in API version 51.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the Loyalty Management or the Rebate Management license.

Fields

Field Name	Field Type	Description
`collectOperator`	DecisionTable CollectOperator (enumeration of type string)	Specifies the operator that's used when the result is filtered by the Collect operator. Valid values are: • `Count` • `Maximum` • `Minimum` • `None` • `Sum`
`conditionCriteria`	string	Logic that's used to decide how the input fields are processed.
`conditionType`	DecisionTable ConditionType (enumeration of type string)	Condition logic that's used for input fields. Valid values are: • `All` • `Any` • `Custom`
`dataSourceType`	DecisionTable DataSourceType (enumeration of type string)	Required. Specifies the type of data source that's used to create a decision table. Valid values are:

Field Name	Field Type	Description
		• `CsvUpload` • `MultipleSobjects` • `SingleSobject`
`decisionTableParameters`	DecisionTableParameter[]	Required. Parameters that you specify in a decision table.
`description`	string	Description of the decision table.
`doesConsiderNullValue`	boolean	Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`). The default value is false.
`executionType`	DecisionTable executionType (enumeration of type string)	Indicates the backing storage for the Decision Table. Valid values are: • `Hbase` • `Soql`
`filterResultBy`	DecisionTable HitPolicy (enumeration of type string)	Specifies how the results of a decision table are filtered if a set of inputs returns multiple matching outputs. Valid values are: • `AnyValue` • `FirstMatch` • `OutputOrder`
`hasIncrementalSyncFailed`	boolean	Indicates if the last incremental refresh failed.
`isIncrementalSyncEnabled`	boolean	Indicates if incremental refresh is enabled for the Decision Table.
`lastSyncDate`	string	Required. Latest date on which the decision table was refreshed.
`refreshFailureReason`	string	Reason why the refresh of the decision table data failed.
`refreshStatus`	DecisionTable RefreshStatus (enumeration of type string)	Specifies the refresh status of the cached data in the decision table. Valid values are: • `Completed` • `Failed` • `InProgress` • `Initiated`
`setupName`	string	Required. Name of the decision table, which appears in Salesforce Setup.
`sourceObject`	string	Required. Object that contains the rules based on which the decision table must provide outcomes.
`status`	DecisionTableStatus (enumeration of type string)	Required. Status of the decision table. Valid values are: • `Draft`

Field Name	Field Type	Description
		• `Inactive` • `Active` • `ActivationInProgress`
`type`	DecisionTableType Operator (enumeration of type string)	Required. Stores the type of decision table. Valid values are: • `Advanced` • `High Volume` • `Low Volume` • `Medium Volume` • `High-Scale Execution`
`usageType`	ExpsSetProcessType (enumeration of type string)	Type of industry or the application within the industry that's using a decision table. Valid values are: • `Bre` Note: When Business Rules Engine is enabled for a Salesforce instance, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets. • `GpaCalculation` • `PlanCostCalculation` • `RatingDiscovery` • `StudentSuccess`

DecisionTableParameters

Represents an input or output field of a decision table.

Fields

Field Name	Field Type	Description
`dataType`	DTParameterDataType (enumeration of type string)	The data type of the field used in a decision table. Valid values are: • `Boolean` • `Currency` • `Date` • `Number` • `Percent` • `String`

Field Name	Field Type	Description
fieldName	string	Required. API name of the fields that selected as an input or output for the decision table.
isGroupByField	boolean	Indicates whether an input field is used to group the business rules of the decision table.
operator	DecisionTable Operator (enumeration of type string)	Required. Operator used for the input field. Valid values are: • Contains • DoesNotExistIn • DoesNotMatch • Equals • ExistsIn • GreaterOrEqual • GreaterThan • LessOrEqual • LessThan • Matches • NotEquals
sequence	integer	The sequence in which input fields are processed. This field is available in API version 52.0 and later.
sortType	DecisionTable SortType (enumeration of type string)	Sort outputs of a decision table based on the values of the input or output parameter field. This field is available in API version 56.0 and later. Valid values are: • AscNullFirst • AscNullLast • DescNullFirst • DescNullLast • None Outputs can't be sorted based on picklist and multi-select picklist fields.
usage	DecisionTable ParameterType (enumeration of type string)	Required. Usage type of a field. The usage type can be one of the following values: • INPUT • OUTPUT

Declarative Metadata Sample Definition

The following is an example of a DecisionTable component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DecisionTable xmlns="http://soap.sforce.com/2006/04/metadata">
```

```
    <collectOperator>None</collectOperator>
    <conditionCriteria>1 and 2 and 3 and 4</conditionCriteria>
    <conditionType>All</conditionType>
    <dataSourceType>SingleSobject</dataSourceType>
    <decisionTableParameters>
        <fieldName>IsDeleted</fieldName>
        <operator>Equals</operator>
        <usage>INPUT</usage>
        <sequence>1</sequence>
        <isGroupByField>true</isGroupByField>
        <sortType>AscNullFirst</sortType>
        <dataType>Number</dataType>
        <fieldPath>AccountFeed.CommentsCount</fieldPath>
        <domainObject>AccountFeed</domainObject>
        <isPriorityField>false</isPriorityField>
        <decimalScale>2</decimalScale>
        <length>14</length>
        <isRequired>false</isRequired>
    </decisionTableParameters>
    <decisionTableParameters>
        <fieldName>IsActive</fieldName>
        <usage>OUTPUT</usage>
    </decisionTableParameters>
    <decisionTableParameters>
        <fieldName>LimitNumber</fieldName>
        <operator>Equals</operator>
        <usage>INPUT</usage>
        <sequence>2</sequence>
        <isGroupByField>false</isGroupByField>
    </decisionTableParameters>
    <decisionTableParameters>
        <fieldName>LimitStartDate</fieldName>
        <usage>OUTPUT</usage>
    </decisionTableParameters>
    <decisionTableParameters>
        <fieldName>GivenBadgeCount</fieldName>
        <operator>Equals</operator>
        <usage>INPUT</usage>
        <sequence>3</sequence>
        <isGroupByField>false</isGroupByField>
    </decisionTableParameters>
    <decisionTableParameters>
        <fieldName>Name</fieldName>
        <operator>Equals</operator>
        <usage>INPUT</usage>
        <sequence>4</sequence>
        <isGroupByField>false</isGroupByField>
    </decisionTableParameters>
    <decisionTableSourceCriterias>
        <sourceFieldName>IsDeleted</sourceFieldName>
        <operator>Equals</operator>
        <value>false</value>
        <sequenceNumber>1</sequenceNumber>
        <valueType>Literal</valueType>
```

```
    </decisionTableSourceCriterias>
    <description>Sample DT created for md-common tests</description>
    <filterResultBy>UniqueValues</filterResultBy>
    <setupName>Sample DT</setupName>
    <sourceObject>WorkBadgeDefinition</sourceObject>
    <sourceConditionLogic>1</sourceConditionLogic>
    <status>Draft</status>
    <type>LowVolume</type>
    <usageType>Bre</usageType>
    <doesConsiderNullValue>false</doesConsiderNullValue>
    <refreshStatus>Failed</refreshStatus>
    <refreshFailureReason>Failed due to limit violation.</refreshFailureReason>
    <executionType>Hbpo</executionType>
    <lastIncrementalSyncDate>""</lastIncrementalSyncDate>
    <uploadStatus>Completed</uploadStatus>
    <isIncrementalSyncEnabled>false</isIncrementalSyncEnabled>
    <hasIncrementalSyncFailed>false</hasIncrementalSyncFailed>
</DecisionTable>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
   <fullName>Sample DT Package</fullName>
   <description>Package created for md-common tests</description>
   <types>
      <members>Sample_DT</members>
      <name>DecisionTable</name>
   </types>
   <types>
      <members>DSL_Sample</members>
      <members>Sample_DT_Default</members>
      <name>DecisionTableDatasetLink</name>
   </types>
   <version>51.0</version>
</Package>
```

DecisionTableDatasetLink

Represents the information about a dataset link associated with a decision table. In a dataset link, select an object for whose records, the decision table must provide an outcome.This type extends the Metadata metadata type and inherits its `fullName` field.

File Suffix and Directory Location

DecisionTableDatasetLink components have the suffix `.decisionTableDatasetLink` and are stored in the `decisionTableDatasetLinks` folder.

Version

DecisionTableDatasetLink components are available in API version 51.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the Loyalty Management or the Rebate Management license.

Fields

Field Name	Field Type	Description
decisionTableName	string	Required. The name of the associated decision table.
decisionTblDatasetParameters	DecisionTblDatasetParameters	Mapping between a decision table parameter and a field of the object selected in the dataset link.
description	string	The description of the dataset link.
isDefault	boolean	Indicates whether a dataset link is the default dataset link for a decision table.
setupName	string	Required. The name of the decision table dataset link, which appears in Setup.
sourceObject	string	Required. The name of the object being evaluated.

DecisionTblDatasetParameters

Represents the mapping between a decision table parameter and a field of the object selected in the dataset link.

The mapping allows the decision table to know which object fields must be compared to the input-output fields of the decision table.

Fields

Field Name	Field Type	Description
datasetFieldName	string	Required. Name of the dataset field whose value must be compared against an Input type decision table parameter when providing the outcome.
fieldName	string	Required. The API name of the decision table field that is selected as an input or output for the decision table dataset link.

Declarative Metadata Sample Definition

The following is an example of a DecisionTableDatasetLink component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DecisionTableDatasetLink xmlns="http://soap.sforce.com/2006/04/metadata">
   <decisionTableName>Sample_DT</decisionTableName>
   <decisionTblDatasetParameters>
      <fieldName>IsDeleted</fieldName>
      <datasetFieldName>IsDeleted</datasetFieldName>
   </decisionTblDatasetParameters>
   <decisionTblDatasetParameters>
      <fieldName>LimitNumber</fieldName>
```

```
      <datasetFieldName>CallDurationInSeconds</datasetFieldName>
   </decisionTblDatasetParameters>
   <decisionTblDatasetParameters>
      <fieldName>Name</fieldName>
      <datasetFieldName>Subject</datasetFieldName>
   </decisionTblDatasetParameters>
   <description>DSL created for md-common tests</description>
   <isDefault>false</isDefault>
   <sourceObject>Task</sourceObject>
   <setupName>DSL Sample</setupName>
</DecisionTableDatasetLink>
```

The following is an example of a default DecisionTableDatasetLink component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DecisionTableDatasetLink xmlns="http://soap.sforce.com/2006/04/metadata">
   <decisionTableName>Sample_DT</decisionTableName>
   <isDefault>true</isDefault>
   <sourceObject>WorkBadgeDefinition</sourceObject>
   <setupName>Default DSL Sample</setupName>
</DecisionTableDatasetLink>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
   <fullName>Sample DT Package</fullName>
   <description>Package created for md-common tests</description>
   <types>
      <members>Sample_DT</members>
      <name>DecisionTable</name>
   </types>
   <types>
      <members>DSL_Sample</members>
      <members>Sample_DT_Default</members>
      <name>DecisionTableDatasetLink</name>
   </types>
   <version>51.0</version>
</Package>
```

Decision Table Invocable Actions

Invoke a decision table or refresh business rules for an active decision table. For more information on standard and custom invocable actions, see **REST API Developer Guide** and **Actions Developer Guide**.

Decision Table Actions

Invoke a decision table.

Decision Table Refresh Action

Refresh business rules for an active decision table.

Decision Table Actions

Invoke a decision table.

Decision tables provide outcomes based on your business rules. For more information about invoking decision tables, see Invoke a Decision Table in Salesforce Help.

This object is available in API version 51.0 and later.

Supported REST HTTP Methods

URI without dataset link

`/services/data/v***XX.X***/actions/custom/decisionTableAction/dtapi_Default`

URI with dataset link

`/services/data/v***XX.X***/actions/custom/decisionTableAction/dslapiname`

Formats

JSON

HTTP Methods

GET, POST

Authentication

`Authorization: Bearer ***token***`

Inputs

You can choose to invoke a decision table with or without dataset link.

To execute a default Decision Table without dataset link, specify the input fields that were defined at the time of the Decision Table creation in the flow. The input fields are optional. However, you must specify at least one field as the input parameter. Use the GET method to retrieve input parameters of a Decision Table definition.

Note: For example, to decide discount percentage for products, you can pass the input parameters, including Brand__c, Highest_Price_Point_c, and Lowest_Price_Point_c.

To execute a Decision Table with dataset link, specify the list that contains the source object and its corresponding field to be used in the dataset link that is associated with the decision table.

Input	Details
`sObjectType`	**Type** sObject **Description** The name of the dataset link's object whose records, the decision table must provide an outcome for.

Outputs

Output	Details
`outcomeList`	**Type** sObject **Description** Outcome list that stores two or more outcomes provided by the decision table. Note: A decision table that is invoked by the Decision Table custom invocable action can provide up to 50 outcomes.
`outcomeType`	**Type** string **Description** Indicates the type of outcome provided by the decision table after the request is successful. Valid values are: • `Multiple Match`—Outcome returns multiple matches. • `No Match`—Outcome returns no match. • `Single Match`—Outcome returns single match.
`singleOutcome`	**Type** sObject **Description** Stores the outcome in case a single outcome is provided by the decision table. In case multiple outcomes are provided, it stores one of the outcomes.

Usage

JSON Sample Request without dataset link

```
{
   "inputs" : [
      {
        "Product__c": "Cloud Kicks",
        "Price__c": 1000
      }
   ]
}
```

JSON Sample Request with dataset Link

```
{
   "inputs" : [
      {
         "Transaction__c" : {
            "Product__c": "Cloud Kicks",
```

```
            "Price__c": 1000
         }
      }
   ]
}
```

JSON Sample Request with dataset Link containing multiple source objects

```
{
   "inputs" : [
      {
         "Transaction__c" : {
            "Product__c": "Cloud Kicks",
            "Price__c": 1000
         }
      }
      {
         "Catalog__c" : {
            "name": "Highest_Price_Point_c",
            "value": "500",
         }
      }
   ]
}
```

JSON Sample Response

```
[{
   “outcomeType” : “SINGLE MATCH”,
   “singleOutcome”: { “Points”: 100 },
   "outcomeList" : [
      {
         “Points”: 100
      }
   ]
}]
```

Decision Table Refresh Action

Refresh business rules for an active decision table.

For more information about refreshing an active decision table, see Refresh Decision Tables in Flows in Salesforce Help. This object is available in API version 51.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/refreshDecisionTable`

Formats

JSON

HTTP Methods

GET, POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
`decisionTableApiName`	**Type** string **Description** Required. API name of an active decision table that you want to refresh.
`isIncremental`	**Type** boolean **Description** Specifies whether to trigger an incremental refresh (`true`) or not (`false`). If set to true, this field triggers an update only on changes made to the recent sObject data instead of performing a full refresh. The default value is `false`. This feature requires a full refresh to be performed initially. After a full refresh is done, you can proceed with incremental refreshes. However, if the changes exceed 2,000 records, the incremental refresh fails. In such cases, a full refresh is necessary to update the Decision Table with the latest sObject data.

Outputs

Output	Details
`errorMessage`	**Type** string **Description** Error message to indicate why the request wasn't successful.
`status`	**Type** string **Description** Indicates whether the decision table is queued for refresh. Valid values are `Queued` or `Failed`.

Usage

Sample Request

```
{
  "inputs": [
    {
      "decisionTableApiName": "Points_to_Redeem_Based_on_Product_and_Order_Channel",
      "isIncremental": true
    }
  ]
}
```

Sample Response

```
{
   "status":"Queued",//Queued or Failed
   "errorMessage":"" //in case any failure
}
```

Decision Explainer for Expression Set

Decision Explainer is an audit-like service that can be used by applications to store their application data to explain past events. The stored data can be retrieved later for reporting through custom-built user interfaces.

Decision Explainer Standard Objects

Use standard objects to create, update, and activate Decision Explainer components.

Decision Explainer Business APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

Decision Explainer Metadata API Types

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

Decision Explainer 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.

SEE ALSO:

Salesforce Help: Decision Explainer for Expression Sets

Decision Explainer Standard Objects

Use standard objects to create, update, and activate Decision Explainer components.

ExplainabilityMsgTemplateLocalization
Represents the translated value of the message in an explainability message template for an expression set step element. This object is available in API version 56.0 and later.

EDITIONS

Available in: Lightning Experience

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

ExplainabilityMsgTemplateLocalization

Represents the translated value of the message in an explainability message template for an expression set step element. This object is available in API version 56.0 and later.

Supported Calls

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

Special Access Rules

Users need the System Administrator permission set to access this object.

Fields

Field	Details
`Language`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort **Description** The language of the translated explainability message template. Possible values are: • `af`—Afrikaans • `am`—Amharic • `ar`—Arabic • `ar_AE`—Arabic (United Arab Emirates) • `ar_BH`—Arabic (Bahrain) • `ar_DZ`—Arabic (Algeria) • `ar_EG`—Arabic (Egypt) • `ar_IQ`—Arabic (Iraq) • `ar_JO`—Arabic (Jordan) • `ar_KW`—Arabic (Kuwait) • `ar_LB`—Arabic (Lebanon)

Field	Details
	• ar_LY—Arabic (Libya) • ar_MA—Arabic (Morocco) • ar_OM—Arabic (Oman) • ar_QA—Arabic (Qatar) • ar_SA—Arabic (Saudi Arabia) • ar_SD—Arabic (Sudan) • ar_SY—Arabic (Syria) • ar_TN—Arabic (Tunisia) • ar_YE—Arabic (Yemen) • bg—Bulgarian • bn—Bengali • bs—Bosnian • ca—Catalan • cs—Czech • cy—Welsh • da—Danish • de—German • de_AT—German (Austria) • de_BE—German (Belgium) • de_CH—German (Switzerland) • de_LU—German (Luxembourg) • el—Greek • el_CY—Greek (Cyprus) • en_AE—English (United Arab Emirates) • en_AU—English (Australian) • en_BE—English (Belgium) • en_CA—English (Canadian) • en_CY—English (Cyprus) • en_DE—English (Germany) • en_GB—English (UK) • en_HK—English (Hong Kong) • en_IE—English (Ireland) • en_IL—English (Israel) • en_IN—English (Indian) • en_MT—English (Malta) • en_MY—English (Malaysian) • en_NL—English (Netherlands) • en_NZ—English (New Zealand)

Field	Details
	• en_PH—English (Phillipines) • en_SG—English (Singapore) • en_US—English • en_ZA—English (South Africa) • eo—Esperanto (Pseudo) • es—Spanish • es_AR—Spanish (Argentina) • es_BO—Spanish (Bolivia) • es_CL—Spanish (Chile) • es_CO—Spanish (Colombia) • es_CR—Spanish (Costa Rica) • es_DO—Spanish (Dominican Republic) • es_EC—Spanish (Ecuador) • es_GT—Spanish (Guatemala) • es_HN—Spanish (Honduras) • es_MX—Spanish (Mexico) • es_NI—Spanish (Nicaragua) • es_PA—Spanish (Panama) • es_PE—Spanish (Peru) • es_PR—Spanish (Puerto Rico) • es_PY—Spanish (Paraguay) • es_SV—Spanish (El Salvador) • es_US—Spanish (United States) • es_UY—Spanish (Uruguay) • es_VE—Spanish (Venezuela) • et—Estonian • eu—Basque • fa—Farsi • fi—Finnish • fr—French • fr_BE—French (Belgium) • fr_CA—French (Canadian) • fr_CH—French (Switzerland) • fr_LU—French (Luxembourg) • fr_MA—French (Morocco) • ga—Irish • gu—Gujarati • haw—Hawaiian

Field	Details
	• `hi`—Hindi • `hmn`—Hmong • `hr`—Croatian • `ht`—Haitian Creole • `hu`—Hungarian • `hy`—Armenian • `in`—Indonesian • `is`—Icelandic • `it`—Italian • `it_CH`—Italian (Switzerland) • `iw`—Hebrew • `iw_EO`—Esperanto RTL (Pseudo) • `ja`—Japanese • `ji`—Yiddish • `ka`—Georgian • `kk`—Kazakh • `kl`—Greenlandic • `km`—Khmer • `kn`—Kannada • `ko`—Korean • `lb`—Luxembourgish • `lt`—Lithuanian • `lv`—Latvian • `mi`—Te reo • `mk`—Macedonian • `ml`—Malayalam • `mr`—Marathi • `ms`—Malay • `mt`—Maltese • `my`—Burmese • `nl_BE`—Dutch (Belgium) • `nl_NL`—Dutch • `no`—Norwegian • `pa`—Punjabi • `pl`—Polish • `pt_BR`—Portuguese (Brazil) • `pt_PT`—Portuguese (European) • `rm`—Romansh

Field	Details
	• `ro`—Romanian • `ro_MD`—Romanian (Moldova) • `ru`—Russian • `ru_AM`—Russian (Armenia) • `ru_BY`—Russian (Belarus) • `ru_KG`—Russian (Kyrgyzstan) • `ru_KZ`—Russian (Kazakhstan) • `ru_LT`—Russian (Lithuania) • `ru_MD`—Russian (Moldova) • `ru_PL`—Russian (Poland) • `ru_UA`—Russian (Ukraine) • `sh`—Serbian (Latin) • `sh_ME`—Montenegrin • `sk`—Slovak • `sl`—Slovene • `sm`—Samoan • `sq`—Albanian • `sr`—Serbian (Cyrillic) • `sv`—Swedish • `sw`—Swahili • `ta`—Tamil • `te`—Telugu • `th`—Thai • `tl`—Tagalog • `tr`—Turkish • `uk`—Ukrainian • `ur`—Urdu • `vi`—Vietnamese • `xh`—Xhosa • `zh_CN`—Chinese (Simplified) • `zh_HK`—Chinese (Hong Kong) • `zh_MY`—Chinese (Malaysia) • `zh_SG`—Chinese (Singapore) • `zh_TW`—Chinese (Traditional) • `zu`—Zulu
`NamespacePrefix`	**Type** string

Field	Details
	Properties Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org 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. This is a required field. The namespace prefix can have one of the following values. • In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless 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 org of the package developer. • In orgs that are not Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The Id of the related explainability message template. This field is a relationship field. **Relationship Name** Parent **Relationship Type** Lookup **Refers To** ExplainabilityMsgTemplate
`Value`	**Type** textarea **Properties** Create, Filter, Sort, Update **Description** The translated label of the explainability message template.

Decision Explainer Business APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

The Decision Explainer runtime service for Business Rules Engine is exposed through Connect APIs.

Note: Use the Decision Explainer resources when your Salesforce instance has Business Rules Engine and Decision Explainer, and you want to show explanations of the results of an expression set step to external users.

With Decision Explainer connect APIs, you can:

- Retrieve a list of explainability message templates
- Retrieve details of a specific explainability message template
- Retrieve explainability logs for expression step elements that have explanations configured

Resources
Decision Explainer API includes these resources.

Response Bodies
Decision Explainer API includes these response bodies.

Resources

Decision Explainer API includes these resources.

Explainability Message Templates (GET)
Retrieves a list of explainability message templates that matches the given search parameters.

Explainability Message Template Details (GET)
Retrieves the details of an explainability message template for a specified template ID.

Explainability Logs (GET)
Retrieves explainability logs for expression step elements for which explanation messages are configured.

Explainability Message Templates (GET)

Retrieves a list of explainability message templates that matches the given search parameters.

Resource

```
/connect/business-rules/explainability/message-templates
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect
/business-rules/explainability/message-templates?messageType=Passed
```

Available version
56.0

Requires Chatter
No

HTTP methods
GET

Request parameters for GET

Note: You must specify at least one parameter as part of the GET request.

Parameter Name	Type	Description	Required or Optional	Available Version
`isDefault`	Boolean	Specifies whether the message in the explainability message template for an expression set step type is default (`true`) or not (`false`).	Optional	56.0
`messageType`	String	The message defined for a step when the step result is either passed or failed.	Optional	56.0
`searchKey`	String	The keyword used to retrieve the list of templates.	Optional	56.0
`stepType`	String	The type of expression set step element. Pass one of these values for this field: • Calculation • Branch • Condition • Decision Matrix Lookup • Decision Table Lookup • Aggregation • Sub Expression • Business Element	Optional	56.0

Response body for GET

Message Templates List

Explainability Message Template Details (GET)

Retrieves the details of an explainability message template for a specified template ID.

Resource

```
/connect/business-rules/explainability/message-templates/${messageTemplateId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect
/business-rules/explainability/message-templates/8U8x00000000027CAA
```

Available version

56.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Message Template Details

Explainability Logs (GET)

Retrieves explainability logs for expression step elements for which explanation messages are configured.

Resource

```
/connect/business-rules/explainability/logs
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect
/business-rules/explainability/logs?actionContextCode=001x0000005DmI3AAK
```

Available version

56.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`actionContextCode`	String	The record ID within the context of the associated application's action that's used to retrieve action logs.	Optional	56.0
`applicationSubType`	String	The subtype of the associated application for which the explainability log is generated. This matches one of the valid values in the ExplainabilityActionDef . `ApplicationSubtype` field.	Optional	56.0
`applicationType`	String	The name of the application for which the explainability service is run. This matches one of the valid values in the ExplainabilityActionDef .`ApplicationType` field.	Optional	56.0
`createdAfter`	String	A valid date time after which the explainability log records are returned.	Optional	56.0
`createdBefore`	String	A valid date time before which the explainability log records are returned.	Optional	56.0
`pageSize`	Integer	The number of explainability log records to return. The value can range from 200 to 500.	Optional	56.0
`processType`	String	The process type of the associated application for which the explainability action log is generated. This matches one of the valid values in the	Optional	56.0

Parameter Name	Type	Description	Required or Optional	Available Version
		ExplainabilityActionDef `ProcessType` field.		
`queryMore`	String	A string returned from the previous request, which you must pass to the next request to get the next page.	Optional	56.0

Response body for GET

Explainability Logs

Response Bodies

Decision Explainer API includes these response bodies.

Explainability Logs

Output representation of the list of explainability action logs.

Explainability Log Detail

Output representation of the list of explainability logs.

Message Template Detail

Output representation of explainability message template details.

Message Templates List

Output representation of the list of explainability message templates.

Explainability Logs

Output representation of the list of explainability action logs.

JSON example

```
{
  "actionLogs": [
    {
      "actionContextCode": "001x0000005SdzIAAS",
      "actionLog": "{This is a sample action log data.}",
      "applicationLogDate": "Mon Aug 01 10:29:35 GMT 2022",
      "applicationSubtype": "ASD1",
      "applicationType": "0",
      "name": "EAD1",
      "processType": "BPT1"
    }
  ],
  "queryMore": " "
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`actionLogs`	Explainability Log Detail[]	The list of explainability logs that matches the search criteria.	Small, 56.0	56.0
`queryMore`	String	A string that can be passed to the next call to fetch the next batch of explainability log records.	Small, 56.0	56.0

Explainability Log Detail

Output representation of the list of explainability logs.

Property Name	Type	Description	Filter Group and Version	Available Version
`actionContextCode`	String	The record ID within the context of the associated application's action that can be used to retrieve the log.	Small, 56.0	56.0
`actionLog`	String	The contents of the explainability log as a JSON string.	Small, 56.0	56.0
`applicationLogDate`	String	The date and time at which the explainability log is generated by the application's action.	Small, 56.0	56.0
`applicationSubtype`	String	The subtype of the associated application for which the explainability log is generated. This matches one of the valid values in the ExplainabilityActionDef `ApplicationSubtype` field.	Small, 56.0	56.0
`applicationType`	String	The name of the application for which the explainability service is run. This matches one of the valid values in the ExplainabilityActionDef `ApplicationType` field.	Small, 56.0	56.0
`name`	String	A name to identify the explainability log record.	Small, 56.0	56.0
`processType`	String	The process type of the associated application for which the explainability action log is generated. This matches one of the valid values in the `ProcessType` field.	Small, 56.0	56.0

Message Template Detail

Output representation of explainability message template details.

JSON example

```
{
  "expressionSetStepType": "Branch",
  "id": "8U8x00000000027CAA",
  "isDefault": true,
  "message": "This is Branch Passing Message",
  "name": "BranchMessageTemplate",
  "resultType": "Passed"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`expressionSetStepType`	String	The step type in an expression set version that uses the explainability message template. Possible values: • Calculation • Branch • Condition • Decision Matrix Lookup • Decision Table Lookup • Aggregation • Sub Expression • Business Element	Small, 56.0	56.0
`id`	String	The record ID of the explainability message template.	Small, 56.0	56.0
`isDefault`	Boolean	Indicates whether the decision explainer template for a specified step type is default (`true`) or not (`false`).	Small, 56.0	56.0
`message`	String	The explanation message in the explainability message template for a specific expression set step type.	Small, 56.0	56.0
`name`	String	The name that identifies the explainability message template.	Small, 56.0	56.0
`resultType`	String	The type of result for which the message template can be used. The step type for which the result is evaluated can be a condition, conditional group, or branch. Possible Values:	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
		• Passed • Failed		

Message Templates List

Output representation of the list of explainability message templates.

JSON example

```
{
  "messageTemplates" : [ {
    "expressionSetStepType" : "Branch",
    "id" : "8U8x00000000027CAA",
    "isDefault" : true,
    "message" : "This is Branch Passing Message",
    "name" : "BranchMessageTemplate",
    "resultType" : "Passed"
  }, {
    "expressionSetStepType" : "Calculation",
    "id" : "8U8x00000000022CAA",
    "isDefault" : true,
    "message" : "CalcMessageTemplate PASS",
    "name" : "CalcMessageTemplate",
    "resultType" : "Passed"
  }, {
    "expressionSetStepType" : "Condition",
    "id" : "8U8x0000000002CCAQ",
    "isDefault" : false,
    "message" : "This is Condition Passing Message",
    "name" : "ConditionMessageTemplate",
    "resultType" : "Passed"
  }, {
    "expressionSetStepType" : "MatrixLookup",
    "id" : "8U8x0000000002HCAQ",
    "isDefault" : true,
    "message" : "This is DM passing message",
    "name" : "DMMessageTemplate",
    "resultType" : "Passed"
  }, {
    "expressionSetStepType" : "ReferenceProcedure",
    "id" : "8U8x0000000002MCAQ",
    "isDefault" : true,
    "message" : "This is SubExpression Passing Message",
    "name" : "SubExpressionMessageTemplate",
    "resultType" : "Passed"
  } ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`code`	String	The API response code when there's a failure in retrieving the list of explainability message templates.	Small, 56.0	56.0
`isSuccess`	Boolean	Identifies whether the request is successful (`true`) or not (`false`).	Small, 56.0	56.0
`message`	String	The error message when there's a failure in retrieving the list of explainability message templates.	Small, 56.0	56.0
`message Templates`	Message Template Detail []	The list of explainability message templates.	Small, 56.0	56.0

Decision Explainer Metadata API Types

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

ExplainabilityMsgTemplate
Represents information about the template that contains the decision explanation message for a specified expression set step type.

SEE ALSO:
Metadata API Developer Guide: Understanding Metadata API

ExplainabilityMsgTemplate

Represents information about the template that contains the decision explanation message for a specified expression set step type.

Parent Type

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

File Suffix and Directory Location

ExplainabilityMsgTemplate components have the suffix `.explainabilityMsgTemplate` and are stored in the `ExplainabilityMsgTemplates` folder.

Version

ExplainabilityMsgTemplate components are available in API version 56.0 and later.

Fields

Field Name	Description

Field Name	Description
`evaluationResult`	**Field Type** EvaluationResult (enumeration of type string) **Description** Required. The type of result for which the message template can be used. The step type for which the result is evaluated can be a condition, conditional group, or branch. Valid values are: • `Failed` • `Passed` • `NoResult`
`expressionSetStepType`	**Field Type** ExpressionSetStepType (enumeration of type string) **Description** Required. The step type in an expression set that uses the explainability message template. Valid values are: • `Aggregation` • `Branch` • `BusinessElement` • `Calculation` • `Condition` • `DecisionTableLookup` • `ListEnabledGroup` • `ListFilter` • `MatrixLookup` • `ReferenceProcedure`
`expsSetProcessType`	**Field Type** ExpsSetProcessType (enumeration of type string) **Description** Required. The type of industry that's using the expression set. Valid values are: • `Bre` • Note: When Business Rules Engine is enabled for a Salesforce instance, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets.

Field Name	Description
isDefault	**Field Type** boolean **Description** Indicates whether the decision explainer template for a specified step type is default (true) or not (false).
masterLabel	**Field Type** string **Description** Required. Master label the for ExplainabilityMsgTemplate.
message	**Field Type** string **Description** Required. The message associated with the template for a specific expression set step type.

Declarative Metadata Sample Definition

The following is an example of an ExplainabilityMsgTemplate component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ExplainabilityMsgTemplate
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <evaluationResult>Passed</evaluationResult>
 <expressionSetStepType>Condition</expressionSetStepType>
 <expsSetProcessType>ProductQualification</expsSetProcessType>
 <isDefault>false</isDefault>
 <masterLabel>ML EMT testDM</masterLabel>
 <message>EMT Testing</message>
</ExplainabilityMsgTemplate>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>*</members>
  <name>ExplainabilityMsgTemplate</name>
 </types>
 <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Decision Explainer 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.

EDITIONS

Available in: Lightning Experience

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

ExplainabilityMsgTemplate
Represents the template that contains the decision explanation message for a specified element type. This object is available in API version 56.0 and later.

ExpressionSetMessageToken
Represents a token that's used in an explainability message template. The token can be replaced with an expression set version resource that the template is used in. This object is available in API version 59.0 and later.

SEE ALSO:

Developer Guide: Introducing Tooling API

ExplainabilityMsgTemplate

Represents the template that contains the decision explanation message for a specified element type. This object is available in API version 56.0 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(), search(), update(), upsert()`

Supported REST API Methods

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name for the ExplainabilityMsgTemplate object.

Field	Details
	The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is **Record Type Name**. This field is automatically generated, but you can supply your own value if you create the record using the API.
`EmtUsageType`	**Type** Picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** A explainability message template's usage type. This field is available from API version 60.0 and later. Possible values are: • `Bre` Note: When Business Rules Engine is enabled for a Salesforce instance, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets.
`ExpressionSetStepType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The step type in an expression set that uses the explainability message template. This is a required field. Possible values are: • `Aggregation` • `Branch` • `BusinessElement` • `Calculation` • `Condition` • `DecisionTableLookup` • `ListFilter`—This value is available from API version 59.0 and later. • `ListEnabledGroup`—This value is available from API version 59.0 and later. • `MatrixLookup` • `ReferenceProcedure` The default value is `Calculation`.

Field	Details
`IsDefault`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the explainability message template for a specified step type is default (`true`) or not (`false`). The default value is `false`.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language in which the message in the explainability message template is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	Description Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label for ExplainabilityMsgTemplate. In the UI, this field id Explainability Message Template.
`Message`	**Type** textarea **Properties** Create, Filter, Sort, Update **Description** The message associated with the template for a specific expression set step type. This is a required field.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer.

Field	Details
	• In organizations that are not Developer Edition organizations, `NamespacePrefix` is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
`ResultType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of result for which the message template can be used. The step type for which the result is evaluated can be a condition, conditional group, or branch. This is a required field. Possible values are: • `Failed` • `NoResult`—This value is available from API version 59.0 and later. • `Passed` The default value is `Passed`.

ExpressionSetMessageToken

Represents a token that's used in an explainability message template. The token can be replaced with an expression set version resource that the template is used in. 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`

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of an expression set message token record.

Field	Details
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name for the ExpressionSetMessageToken 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 **Record Type Name**. This field is automatically generated, but you can supply your own value if you create the record using the API.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language in which the expression set message token is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)

Field	Details
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label for the ExpressionSetMessageToken. In the UI, this field is Expression Set Message Token.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • 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.

Lookup Tables

Business Rules Engine has two types of lookup tables—decision matrices and decision tables. Learn more about the developer resources of lookup tables for integration with Flows, Omniscripts, or any third-party custom tools.

Decision Matrix Data Model Overview
Learn about the objects and relationships within the Decision Matrix data model.

Lookup Tables Standard Objects
Use standard objects to create, update, and activate Lookup Table components.

Lookup Tables Business APIs
Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

BusinessRule Namespace
The `BusinessRule` namespace provides classes for migrating calculation matrices and calculation procedures from Vlocity to the Business Rules Engine in Salesforce.

Lookup Tables Invocable Actions
Use actions to invoke Lookup Table actions in a flow.

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

Lookup Tables 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.

SEE ALSO:

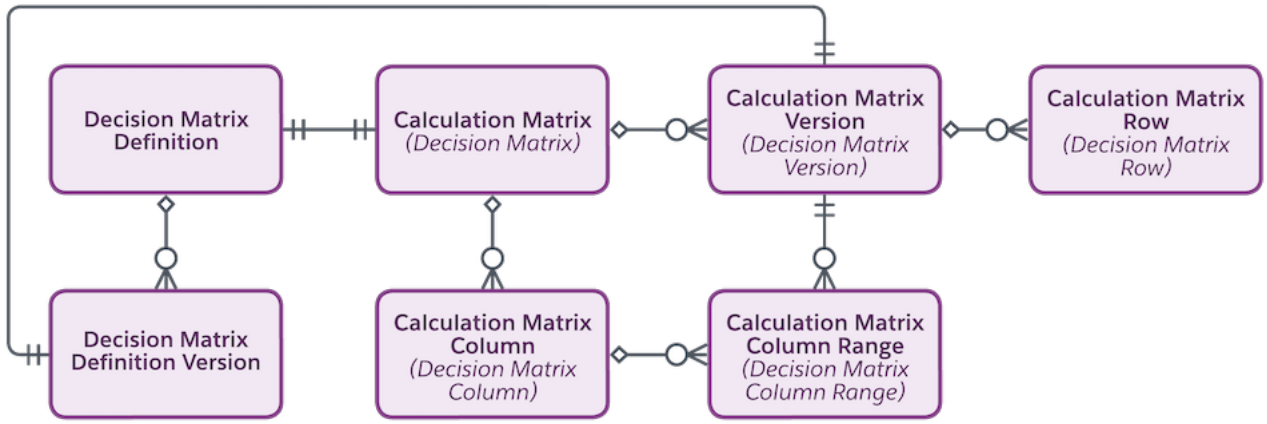
Salesforce Help: Decision Matrices

Salesforce Help: Decision Tables

Decision Matrix Data Model Overview

Learn about the objects and relationships within the Decision Matrix data model.

The Decision Matrix data model provides a set of objects and fields that you can refer to implement and extend decision matrices.



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

Lookup Tables Standard Objects

Use standard objects to create, update, and activate Lookup Table components.

EDITIONS

Available in: Lightning Experience

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

CalculationMatrix
Matches input values to a table row and returns the row's output values. The label for this object is Decision Matrix. This object is available in API version 53.0 and later.

CalculationMatrixColumn
Defines a column in a Decision Matrix. The label for this object is Decision Matrix Column. This object is available in API version 53.0 and later.

CalcMatrixColumnRange
Represents information about a value in a decision matrix column when the column is of the type number range or text range. This object is available in API version 59.0 and later.

CalculationMatrixRow
Defines a row in a Decision Matrix. The label for this object is Decision Matrix Row. This object is available in API version 53.0 and later.

CalculationMatrixVersion
Defines a version of a Decision Matrix. The label for this object is Decision Matrix Version. This object is available in API version 53.0 and later.

CalculationMatrix

Matches input values to a table row and returns the row's output values. The label for this object is Decision Matrix. This object is available in API version 53.0 and later.

Decision Matrices are useful for implementing complex rules in a systematic, readable way. There are two types: Standard and Grouped. A Grouped Decision Matrix groups rows in different versions by one or two keys such as geographic region or product code.

Supported Calls

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

Special Access Rules

Access to Decision Matrices requires Omnistudio licenses.

Fields

Field	Details
`DecisionMatrixDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** The decision matrix definition record associated with this calculation matrix. This field is a polymorphic relationship field. **Relationship Name** DecisionMatrixDefinition **Relationship Type** Lookup **Refers To** DecisionMatrixDefinition, DecisionTable
`DecisionMatrixType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of lookup table. Possible values are: • `DecisionMatrix` • `DecisionTable` The default value is `DecisionMatrix`.
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** A text description of the Decision Matrix.

Field	Details
`GroupKey`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A key for grouping matrix rows in different versions, such as geographic region or product code.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, it's possible the user only accessed this record or list view (`LastReferencedDate`) but didn't view it.
`MigrationStatus`	**Type** textarea **Properties** Nillable **Description** The status of migrating the data from the Calculation Matrix object to the Decision Matrix Definition object.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The Decision Matrix name.
`OwnerId`	**Type** reference

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who currently owns this matrix. Default value is the user logged in to the API to perform the create action. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`SubGroupKey`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A subkey for grouping matrix rows in different versions, such as geographic region or product code. For example, if the `GroupKey` is `Country`, the `SubGroupKey` can be `State` or `Province`.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The Decision Matrix type. A Standard Decision Matrix has no special features. A Grouped Decision Matrix groups rows by one or two keys (`GroupKey` and `SubGroupKey`) such as geographic region or product code. Possible values are: • `Grouped` • `Standard`
`UniqueName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The unique identifier of the record, which is sourced from the value in the Name field of CalculationMatrix (decision matrix). For example, if the name of the calculation matrix is sample matrix, its UniqueName would be sample_matrix.
`UsageType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** A decision matrix's usage type. Available in API version 59.0 and later. Possible value is: • `Bre`-Default When Business Rules Engine is enabled on your Salesforce org, the default value is Bre. Other usage types may be available to you depending on your industry solution and permission sets.

Usage

Expression Sets, OmniScripts, and Integration Procedures can call Decision Matrices.

CalculationMatrixColumn

Defines a column in a Decision Matrix. The label for this object is Decision Matrix Column. This object is available in API version 53.0 and later.

Supported Calls

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

Special Access Rules

Access to Decision Matrices requires Omnistudio licenses.

Fields

Field	Details
`ApiName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the column.
`CalculationMatrixId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the Decision Matrix to which this column belongs. This is a relationship field. **Relationship Name** CalculationMatrix **Relationship Type** Lookup **Refers To** CalculationMatrix
`ColumnType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies whether the column matches matrix input or is returned as output. Possible values are: • `Input` • `Output`
`DataType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of data in the column. Possible values are: • `Boolean` • `Currency` • `Number` • `NumberRange`

Field	Details
	• `Percent` • `Text` • `TextRange`
`DisplaySequence`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The position of this column in the column order.
`IsWildcardColumn`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies that this column can contain a wildcard value such as `ALL`. The default value is `false`.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The column name.
`RangeValues`	**Type** textarea **Properties** Create, Nillable, Update **Description** A list of values that define range boundaries.
`WildcardColumnValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value that indicates a wildcard, for example `ALL`. Applicable if `IsWildcardColumn` is `true`.

CalcMatrixColumnRange

Represents information about a value in a decision matrix column when the column is of the type number range or text range. This object is available in API version 59.0 and later.

Supported Calls

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

Fields

Field	Details
`CalculationMatrixColumnId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the decision matrix column associated with the column range value. This field is a relationship field. **Relationship Name** CalculationMatrixColumn **Relationship Type** Lookup **Refers To** CalculationMatrixColumn
`CalculationMatrixVersionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The decision matrix version ID asociated with the column range value. This field is a relationship field. **Relationship Name** CalculationMatrixVersion **Relationship Type** Lookup **Refers To** CalculationMatrixVersion
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the decision matrix column.
`Occurrence`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The number of times a range value is used in a decision matrix version.
`RangeStartValue`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The value that defines the start of a range.

CalculationMatrixRow

Defines a row in a Decision Matrix. The label for this object is Decision Matrix Row. 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

Access to Decision Matrices requires Omnistudio licenses.

Fields

Field	Details
`CalculationMatrixVersionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the Decision Matrix Version to which this row belongs.

Field	Details
	This is a relationship field. **Relationship Name** CalculationMatrixVersion **Relationship Type** Lookup **Refers To** CalculationMatrixVersion
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The last date on which this row version is active. Applicable if `IsVersionEnabled` is `true`.
`InputData`	**Type** textarea **Properties** Create, Nillable, Update **Description** The input columns and associated values for this row of the matrix.
`IsVersionEnabled`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Specifies whether the associated matrix version is active. Derived from the associated Decision Matrix Version (CalculationMatrixVersion object). The default value is `false`.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The row name.
`OutputData`	**Type** textarea

Field	Details
	Properties Create, Nillable, Update **Description** The output columns and associated values for this row of the matrix.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The first date on which this row version is active. Applicable if `IsVersionEnabled` is `true`.

CalculationMatrixVersion

Defines a version of a Decision Matrix. The label for this object is Decision Matrix Version. This object is available in API version 53.0 and later.

Supported Calls

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

Special Access Rules

Access to Decision Matrices requires Omnistudio licenses.

Fields

Field	Details
`ApiName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the decision matrix version. This field is available in API version 56.0 and later.
`CalculationMatrixId`	**Type** reference **Properties** Create, Filter, Group, Sort

Field	Details
	Description The ID of the Decision Matrix to which this version belongs. This is a relationship field. **Relationship Name** CalculationMatrix **Relationship Type** Lookup **Refers To** CalculationMatrix
`DecisionMatrixDefinitionVerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** The decision matrix definition version associated with this calculation matrix version. This field is a relationship field. **Relationship Name** DecisionMatrixDefinitionVer **Relationship Type** Lookup **Refers To** DecisionMatrixDefinitionVersion
`DscnModelNoteExportStatus`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort **Description** Indicates the export status of a decision matrix version in the Decision Model and Notation (DMN) format. Possible values are: • `Initiated` • `InProgress` • `Complete` • `Failed`
`EndDateTime`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The last date on which this matrix version is active.
`GroupKey`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** A key for grouping matrix rows in different versions, such as geographic region or product code. Derived from the associated Decision Matrix (CalculationMatrix object).
`GroupKeyValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the `GroupKey` for this version. For example, if the `GroupKey` is `Country`, the `GroupKeyValue` can be `United States`.
`IsEnabled`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Specifies whether this version is active. The default value is `false`.
`LoadProcessStatus`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The status of a data upload from a `.csv` file. Possible values are: • `Completed` • `CompletedWithErrors` • `Failed` • `InProgress` • `Pending`

Field	Details
`MatrixType`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The matrix type, either `Standard` or `Grouped`. A Grouped Decision Matrix groups rows in different Decision Matrix Versions by one or two keys such as geographic region or product code. Derived from the associated Decision Matrix (CalculationMatrix object).
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The matrix version name.
`Rank`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** When the invocation time of a matrix call is between the `StartDateTime` and `EndDateTime` of more than one enabled matrix version, the version with the highest `Rank` is chosen.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The first date on which this matrix version is active.
`SubGroupKey`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** A subkey for grouping matrix rows in different versions, such as geographic region or product code. For example, if the `GroupKey` is `Country`, the `SubGroupKey` can be `State or Province`. Derived from the associated Decision Matrix (CalculationMatrix object).

Field	Details
`SubGroupKeyValue`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The value of the `SubGroupKey` for this version. For example, if the `SubGroupKey` is `State or Province`, the `SubGroupKeyValue` can be `California`.
`VersionNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The version number.

Lookup Tables Business APIs

Connect REST APIs help customers, partners, and ISVs integrate with Salesforce software and UIs.

The runtime service for Lookup Table components is exposed through Connect APIs.

With Lookup Table Connect APIs, you can:

- Perform a lookup on a decision matrix.
- Perform a lookup on a decision table.
- Retrieve lookup tables.

Resources
Lookup Table API includes these resources.

Request Bodies
Lookup Table API includes these request bodies.

Response Bodies
Lookup Table API includes these response bodies.

Resources

Lookup Table API includes these resources.

Decision Matrix Lookup (POST)
Performs a lookup on decision matrix rows based on the input values provided, and returns the row's output.

Decision Model Notation Export (POST)
Export decision matrix data to a file in the DMN (Decision Model Notation) format, an easily readable format for business rules designed by Object Management Group.

Decision Table Definitions (POST)
Create a decision table definition. A decision table definition contains all the details required to create a decision table.

Decision Table Definitions (DELETE, GET)
Get details of a decision table definition. Delete a decision table definition associated with a decision table.

Decision Table Definitions (PATCH)
Update a decision table definition associated with a decision table.

Decision Table Lookup (POST)
Performs a lookup on a decision table.

Decision Table Invocation (POST)
Invoke a decision table by passing multiple input conditions within the same request.

Lookup Tables (GET)
Retrieve lookup tables.

Decision Matrix Lookup (POST)

Performs a lookup on decision matrix rows based on the input values provided, and returns the row's output.

Resource

```
/connect/business-rules/decision-matrices/${matrixName}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/business-rules/decision-matrices/InsurancePremium
```

Available version
55.0

Requires Chatter
No

HTTP methods
POST

Request body for POST

JSON example

```
{
  "inputs": [
    {
      "input": [
        {
          "name": "Premium",
          "value": "2400"
        }
              ]
    },
    {
      "input": [
        {
          "name": "Tenure",
          "value": "10"
```

```
        }
      ]
    }
  ],
  "options": {
    "effectiveDate": "2022-12-03T10:15:30Z"
  }
}
```

Here, *Premium* and *Tenure* are column headers in the matrix, and *2400* and *10* are values of a cell in the column.

Properties

Name	Type	Description	Required or Optional	Available Version
inputs	Decision Matrix Input	List of inputs passed to a decision matrix. An input may contain multiple variables.	Required	55.0
options	Decision Matrix Options Input	The lookup options for a decision matrix.	Optional	55.0

Response body for POST

Decision Matrix Lookup Result

Decision Model Notation Export (POST)

Export decision matrix data to a file in the DMN (Decision Model Notation) format, an easily readable format for business rules designed by Object Management Group.

Resource

```
/connect/business-rules/decision-models/export
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/decision-models/export
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
   "decisionModelEntityIds":[
      "01NRO00000004f72AA",
      "01NRO000000rfn27AA"
   ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`decisionModelEntityIds`	String[]	A list of decision matrix version IDs to export data from.	Required	58.0

Response body for POST

Decision Model Export Output

SEE ALSO:

DMN (Decision Model Notation)

Decision Table Definitions (POST)

Create a decision table definition. A decision table definition contains all the details required to create a decision table.

Resource

```
/connect/business-rules/decision-table/definitions
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/decision-table/definitions
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

JSON example for a single object source

```
{
   "setupName":"Product Qualificiation eligibility",
   "fullName":"ProductQualificationEligibility",
   "description":"Eligiblity of Products using Qualification Rules",
   "usageType":"ProductEligibility",
   "sourceType":"SingleSobject",
   "sourceObject":"AccountFeed",
   "status":"Draft",
   "decisionResultPolicy":"FirstMatch",
   "doesConsiderNullValue": true,
   "collectOperator":"Count",
   "conditionType":"Any",
   "conditionCriteria":"1 OR 2 OR 3",
   "parameters":[
      {
         "fieldName":"IsDeleted",
```

```
            "usage":"INPUT",
            "operator":"Equals",
            "sequence":"1"
         },
         {
            "fieldName":"Id",
            "usage":"INPUT",
            "operator":"Equals",
            "sequence":"2"
         },
         {
            "fieldName":"Title",
            "usage":"INPUT",
            "operator":"Equals",
            "sequence":"3"
         },
         {
            "fieldName":"CreatedById",
            "usage":"OUTPUT"
         }
      ]
}
```

JSON example for a multi-object source

```
{
   "setupName":"Jumbo Pricing Definition",
   "fullName":"JumboPricingDefinition",
   "description":"Join all the DT definitions into one jumbo pricing definition",
   "usageType":"ProductEligibility",
   "type":"LowVolume",
   "sourceType":"MultipleSobjects",
   "sourceObject":"AccountFeed",
   "status":"Draft",
   "decisionResultPolicy":"OutputOrder",
   "doesConsiderNullValue": true,
   "collectOperator":"Count",
   "sourceconditionLogic":"1 AND 2 AND 3",
   "conditionType":"Any",
   "conditionCriteria":"1 OR 2 OR 3 OR 4 OR 5",
   "parameters":[
      {
         "fieldName":"IsDeleted",
         "usage":"INPUT",
         "operator":"Equals",
         "sequence":"1",
         "columnMapping":"IsDeleted"
      },
      {
         "fieldName":"Id",
         "usage":"INPUT",
         "operator":"Equals",
         "sequence":"2",
         "columnMapping":"Id"
      },
```

```
        {
            "fieldName":"Title",
            "usage":"INPUT",
            "operator":"Equals",
            "sequence":"3",
            "columnMapping":"Title"
        },
        {
            "fieldName":"OldvalNumber",
            "usage":"INPUT",
            "operator":"Equals",
            "sequence":"4",
            "columnMapping":"AccountHistory.OldvalNumber"
        },
        {
            "fieldName":"OldvalString",
            "usage":"INPUT",
            "operator":"Equals",
            "sequence":"5",
            "columnMapping":"AccountHistory.OldvalString"
        },
        {
            "fieldName":"CreatedById",
            "usage":"OUTPUT",
            "columnMapping":"CreatedById"
        },
        {
            "fieldName":"NewvalNumber",
            "usage":"OUTPUT",
            "columnMapping":"AccountHistory.NewvalNumber"
        },
        {
            "fieldName":"NewvalString",
            "usage":"OUTPUT",
            "columnMapping":"AccountHistory.NewvalString"
        }
    ]
    "sourceCriteria":[
        {
            "sourceFieldName":"OldvalString",
            "value":"5",
            "operator":"Equals",
            "valueType":"Parameter",
            "sequenceNumber":"1"
        }
    ]
}
```

Request body for POST

Properties

Name	Type	Description	Required or Optional	Available Version
`collectOperator`	String	Operator to apply a filter to outputs. Valid values are: • `Count` • `Maximum` • `Minimum` • `None` • `Sum`	Optional	58.0
`conditionCriteria`	String	Custom logic applied on the decision table columns to decide how the input fields are processed.	Optional Required when the condition type is `Custom`.	58.0
`conditionType`	String	Condition logic for input fields. Valid values are: • `All` • `Any` • `Custom`	Optional	58.0
`description`	String	Description of the decision table.	Optional	58.0
`decisionResultPolicy`	String	Results policy to filter results of the decision table. Valid values are: • `AnyValue` • `CollectOperator—For internal use only` • `FirstMatch` • `OutputOrder` • `Priority—For internal use only` • `RuleOrder—For internal use only` • `UniqueValues—For internal use only`	Optional	58.0
`doesConsiderNullValue`	Boolean	Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`). The default value is `false`.	Optional	60.0

Name	Type	Description	Required or Optional	Available Version
`fullName`	String	Unique name of the rule definition.	Required	58.0
`isSetCollectOperator`	Boolean	For internal use only. Indicates whether the `collectOperator` is enabled (`true`) or not (`false`).	Optional	58.0
`isSetConditionCriteria`	Boolean	For internal use only. Indicates whether the `conditionCriteria` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetConditionType`	Boolean	For internal use only. Indicates whether the `conditionType` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetDescription`	Boolean	For internal use only. Indicates whether the `description` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetDecisionResultPolicy`	Boolean	For internal use only. Indicates whether the `DecisionResultPolicy` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetFullName`	Boolean	For internal use only. Indicates whether the `FullName` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetParameters`	Boolean	For internal use only. Indicates whether the `parameters` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSetupName`	Boolean	For internal use only. Indicates whether the `setupName` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceconditionLogic`	Boolean	For internal use only. Indicates whether the `sourceConditionLogic` field is enabled (`true`) or not (`false`).	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
`isSetSourceCriteria`	Boolean	For internal use only. Indicates whether the `sourceCriteria` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceObject`	Boolean	For internal use only. Indicates whether the `sourceObject` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceType`	Boolean	For internal use only. Indicates whether the `sourceType` is enabled (`true`) or not (`false`).	Optional	58.0
`isSetType`	Boolean	For internal use only. Indicates whether the `type` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetUsageType`	Boolean	For internal use only. Indicates whether the `UsageType` field is enabled (`true`) or not (`false`).	Optional	58.0
`parameters`	Decision Table Parameter Input[]	Array of input and output fields for the decision table.	Optional	58.0
`setupName`	String	Name of the decision table.	Required	58.0
`sourceConditionLogic`	String	Custom logic to filter the decision table rows.	Optional	58.0
`sourceCriteria`	Decision Table Source Criteria Input[]	Output array representation of source filters for the decision table rows, such as, `fieldName`, `operators`, `valueType`, and more.	Optional	58.0
`sourceObject`	String	Object containing business rules for the decision table to read.	Required	58.0
`sourceType`	String	Type of source to obtain decision table data. Valid values are: • `CsvUpload` • `MultipleSobjects` • `SingleSobject`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
`status`	String	Status of the decision table. Valid values are: • `ActivationInProgress` • `ActivationInProgress` • `Draft` • `Inactive`	Required	58.0
`type`	String	Type of the decision table. Valid values are: • `HighVolume` • `LowVolume`	Optional	58.0
`usageType`	String	Process type that uses the decision table. Valid values are: • `Pricing` • `ProductEligibility`	Optional	58.0

Response body for POST

Decision Table Output

Decision Table Definitions (DELETE, GET)

Get details of a decision table definition. Delete a decision table definition associated with a decision table.

Resource

```
/connect/business-rules/decision-table/definitions/${decisionTableId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/decision-table/definitions/01Dxx00000002Ur
```

Available version

58.0

Requires Chatter

No

HTTP methods

DELETE, GET

Response body for DELETE

Decision Table Output

Response body for GET

Decision Table Output

Decision Table Definitions (PATCH)

Update a decision table definition associated with a decision table.

Resource

```
/connect/business-rules/decision-table/definitions/${decisionTableId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/decision-table/definitions/01Dxx00000002Ur
```

Available version

58.0

Requires Chatter

No

HTTP methods

PATCH

JSON example

```
{
   "setupName":"Product Qualificiation eligibility",
   "fullName":"ProductQualificationEligibility",
   "description":"Eligiblity of Products using Qualification Rules",
   "usageType":"ProductEligibility",
   "sourceType":"SingleSobject",
   "sourceObject":"AccountFeed",
   "status":"Draft",
   "decisionResultPolicy":"UniqueValues",
   "doesConsiderNullValue": true,
   "collectOperator":"Count",
   "conditionType":"Any",
   "conditionCriteria":"1 OR 2 OR 3",
   "parameters":[
      {
         "fieldName":"IsDeleted",
         "usage":"INPUT",
         "operator":"Equals",
         "sequence":"1"
      },
      {
         "fieldName":"Id",
         "usage":"INPUT",
         "operator":"Equals",
         "sequence":"2"
      },
      {
         "fieldName":"Title",
         "usage":"INPUT",
         "operator":"Equals",
         "sequence":"3"
      },
      {
         "fieldName":"CreatedById",
         "usage":"OUTPUT"
```

```
        }
    ]
}
```

Request body for PATCH

Properties

Name	Type	Description	Required or Optional	Available Version
`collectOperator`	String	Operator to apply a filter to outputs. Valid values are: • `Count` • `Maximum` • `Minimum` • `None` • `Sum`	Optional	58.0
`conditionCriteria`	String	Custom logic applied on the decision table columns to decide how the input fields are processed.	Optional Required when the condition type is `Custom`.	58.0
`conditionType`	String	Condition logic for input fields. Valid values are: • `All` • `Any` • `Custom`	Optional	58.0
`description`	String	Description of the decision table.	Optional	58.0
`decisionResultPolicy`	String	Results policy to filter results of the decision table. Valid values are: • `AnyValue` • `CollectOperator—For internal use only` • `FirstMatch` • `OutputOrder` • `Priority—For internal use only` • `RuleOrder—For internal use only` • `UniqueValues—For internal use only`	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
`doesConsiderNullValue`	Boolean	Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`). The default value is `false`.	Optional	60.0
`fullName`	String	Unique name of the rule definition.	Required	58.0
`isSetCollectOperator`	Boolean	For internal use only. Indicates whether the `collectOperator` is enabled (`true`) or not (`false`).	Optional	58.0
`isSetConditionCriteria`	Boolean	For internal use only. Indicates whether the `conditionCriteria` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetConditionType`	Boolean	For internal use only. Indicates whether the `conditionType` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetDescription`	Boolean	For internal use only. Indicates whether the `description` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetDecisionResultPolicy`	Boolean	For internal use only. Indicates whether the `DecisionResultPolicy` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetFullName`	Boolean	For internal use only. Indicates whether the `FullName` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetParameters`	Boolean	For internal use only. Indicates whether the `parameters` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSetupName`	Boolean	For internal use only. Indicates whether the `setupName` field is enabled (`true`) or not (`false`).	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
`isSetSourceconditionLogic`	Boolean	For internal use only. Indicates whether the `sourceConditionLogic` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceCriteria`	Boolean	For internal use only. Indicates whether the `sourceCriteria` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceObject`	Boolean	For internal use only. Indicates whether the `sourceObject` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceType`	Boolean	For internal use only. Indicates whether the `sourceType` is enabled (`true`) or not (`false`).	Optional	58.0
`isSetType`	Boolean	For internal use only. Indicates whether the `type` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetUsageType`	Boolean	For internal use only. Indicates whether the `UsageType` field is enabled (`true`) or not (`false`).	Optional	58.0
`parameters`	Decision Table Parameter Input[]	Array of input and output fields for the decision table.	Optional	58.0
`setupName`	String	Name of the decision table.	Required	58.0
`source condition Logic`	String	Custom logic to filter the decision table rows.	Optional	58.0
`sourceCriteria`	Decision Table Source Criteria Input[]	Output array representation of source filters for the decision table rows, such as, `fieldName`, `operators`, `valueType`, and more.	Optional	58.0
`sourceObject`	String	Object containing business rules for the decision table to read.	Required	58.0
`sourceType`	String	Type of source to obtain decision table data. Valid values are: • `CsvUpload`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
		• `MultipleSobjects` • `SingleSobject`		
`status`	String	Status of the decision table. Valid values are: • `ActivationInProgress` • `ActivationInProgress` • `Draft` • `Inactive`	Required	58.0
`type`	String	Type of the decision table. Valid values are: • `HighVolume` • `LowVolume`	Optional	58.0
`usageType`	String	Process type that uses the decision table. Valid values are: • `Pricing` • `ProductEligibility`	Optional	58.0

Response body for PATCH

Decision Table Output

Decision Table Lookup (POST)

Performs a lookup on a decision table.

Resource

```
/connect/business-rules/decision-table/${decisionTableId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v55.0/connect
/decision-table/01DB0000000TNQzMAO
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
   "conditions":[
      {
         "conditionsList":[
            {
               "fieldName":"Product__c",
               "value":"Nike",
               "operator":"Matches"
            },
            {
               "fieldName":"Price__c",
               "value":1000,
               "operator":"GreaterThan"
            }
         ]
      },
      {
         "conditionsList":[
            {
               "fieldName":"Product__c",
               "value":"Adidas",
               "operator":"Matches"
            },
            {
               "fieldName":"Price__c",
               "value":1500,
               "operator":"GreaterThan"
            }
         ]
      }
   ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
conditions	Decision Table Condition[]	The list of decision table conditions on which the decision table executes and provides outcomes.	Required	55.0
datasetLinkName	String	The API name of the dataset link provided as an input for the decision table execution.	Optional	55.0

Response body for POST

Decision Table Outcome

Decision Table Invocation (POST)

Invoke a decision table by passing multiple input conditions within the same request.

Resource

```
/connect/business-rules/decision-table/lookup/${decisionTableId}
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect
/business-rules/decision-table/lookup/${01DD2000000004NMAQ}
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
   "datasetLinkName" : "transactionMapping",
   “conditions” :[
      {
        “conditionsList”: [
          {
              "fieldName": "Product__c",
              "value": "Nike",
              "operator": "Matches" //Operator is optional
          },
          {
              "fieldName": "Price__c",
              "value": 1000,
              "operator": "GreaterThan"
          }
        ]
      },
      {
        “conditionsList”: [
          {
              "fieldName": "Product__c",
              "value": "Adidas",
              "operator": "Matches" //Operator is optional
          },
          {
              "fieldName": "Price__c",
              "value": 1500,
              "operator": "GreaterThan"
          }
        ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
`conditions`	Decision Table Condition List	The list of decision table conditions on which the decision table executes and provides outcomes.	Required	58.0
`datasetLinkName`	String	The API name of the dataset link provided as an input for the decision table execution.	Optional	58.0

Response body for POST

Decision Table Bulk Outcome

Lookup Tables (GET)

Retrieve lookup tables.

Resource

```
/connect/business-rules/lookup-tables
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/lookup-tables?searchKey=D&usageType=Bre&lookupTypes=DecisionTable,DecisionMatrix
```

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/lookup-tables?searchKey=D&usageType=Bre
```

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/business-rules/lookup-tables?searchKey=D&usageType=Bre&lookupTypes=DecisionTable&businessKnowledgeModelNameMatchDiscount
```

Available version

59.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`lookupTypes`	String	Type of lookup table. Valid values are: • `DecisionMatrix` • `DecisionTable`	Optional	59.0
`searchKey`	String	The search text entered by the user to retrieve a list of lookup tables.	Required	59.0

Parameter Name	Type	Description	Required or Optional	Available Version
`usageType`	String	Usage type of the lookup table. Valid value is `Bre`. The default value is `Bre`. When Business Rules Engine is enabled for a Salesforce org, the default value is `Bre`. Other usage types may be available to you depending on your industry solution and permission sets.	Required	59.0

Response body for GET

Lookup Tables Result List

Request Bodies

Lookup Table API includes these request bodies.

Decision Matrix Input
Input representation of the inputs passed to a decision matrix for lookup.

Decision Matrix Lookup Input
Input representation of the input for a decision matrix lookup.

Decision Matrix Options Input
Input representation of the options used to look up a decision matrix.

Decision Matrix Variable Input
Input representation of the variables in an input passed to a decision matrix lookup.

Decision Model Export Input
Input representation of the request to export decision matrix data.

Decision Table Bulk Input
Input representation of the Decision Table bulk lookup.

Decision Table Condition Input
Input representation of the decision table condition.

Decision Table Condition List Input
Input representation of the Decision Table condition list.

Decision Table Input
Input representation of a decision table.

Decision Table Definition Input
Input representation of a decision table definition.

Decision Table Parameter Input
Input representation of parameters defined for the decision table.

Decision Table Source Criteria Input

Input representation of source criteria for the decision table.

Decision Matrix Input

Input representation of the inputs passed to a decision matrix for lookup.

Properties

Name	Type	Description	Required or Optional	Available Version
`input`	Decision Matrix Variable List	List of variables in an input.	Required	55.0

Decision Matrix Lookup Input

Input representation of the input for a decision matrix lookup.

JSON example

```
{
  "inputs": [
    {
      "input": [
        {
          "name": "Premium",
          "value": "2400"
        }
              ]
    },
    {
      "input": [
        {
          "name": "Tenure",
          "value": "10"
        }
      ]
    }
  ],
  "options": {
    "effectiveDate": "2022-12-03T10:15:30Z"
  }
}
```

Here, *`Premium`* and *`Tenure`* are column headers in the matrix, and *`2400`* and *`10`* are values of a cell in the column.

Properties

Name	Type	Description	Required or Optional	Available Version
`inputs`	Decision Matrix Input	List of inputs passed to a decision matrix. An input may contain multiple variables.	Required	55.0

Name	Type	Description	Required or Optional	Available Version
`options`	Decision Matrix Options Input	The lookup options for a decision matrix.	Optional	55.0

Decision Matrix Options Input

Input representation of the options used to look up a decision matrix.

Properties

Name	Type	Description	Required or Optional	Available Version
`effectiveDate`	String	The date from when a decision matrix version comes into effect. The date format is yyyy-mm-dd'T'hh:mm:ss'Z.	Optional	55.0
`useDatesOnly`	String	Specifies that only the date portion (yyyy-mm-dd) of the value of the effectiveDate field be used at the time of execution.	Optional	55.0

Decision Matrix Variable Input

Input representation of the variables in an input passed to a decision matrix lookup.

Properties

Name	Type	Description	Required or Optional	Available Version
`name`	String	The name of the variable.	Required	55.0
`value`	Object	The value assigned to the variable.	Required	55.0

Decision Model Export Input

Input representation of the request to export decision matrix data.

JSON example

```
{
   "decisionModelEntityIds":[
      "01NRO00000004f72AA",
      "01NRO000000rfn27AA"
   ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`decisionModelEntityIds`	String[]	A list of decision matrix version IDs to export data from.	Required	58.0

Decision Table Bulk Input

Input representation of the Decision Table bulk lookup.

JSON example

```
{
   "datasetLinkName" : "transactionMapping",
   “conditions” :[
      {
        “conditionsList”: [
          {
              "fieldName": "Product__c",
              "value": "Nike",
              "operator": "Matches" //Operator is optional
          },
          {
              "fieldName": "Price__c",
              "value": 1000,
              "operator": "GreaterThan"
          }
        ]
      },
      {
        “conditionsList”: [
          {
              "fieldName": "Product__c",
              "value": "Adidas",
              "operator": "Matches" //Operator is optional
          },
          {
              "fieldName": "Price__c",
              "value": 1500,
              "operator": "GreaterThan"
          }
        ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
`conditions`	Decision Table Condition List	The list of decision table conditions on which the decision table executes and provides outcomes.	Required	58.0

Name	Type	Description	Required or Optional	Available Version
`datasetLinkName`	String	The API name of the dataset link provided as an input for the decision table execution.	Optional	58.0

Decision Table Condition Input

Input representation of the decision table condition.

Properties

Name	Type	Description	Required or Optional	Available Version
`fieldName`	String	The field name that is selected as an input for the decision table.	Required	55.0
`value`	String	The value of the data type that is selected as an input. Specify the value of a decision table's group-by field in double quotes, which is also applicable for numeric or integer type fields. For example, specify `"value": "1000"` for a Price numeric type field, and `"value" : "102.0"` for a Number integer type field.	Required	55.0
`operator`	String	The operator used for the input field. Valid values are: • `DoesNotExistIn`—Use to check if the input value doesn't exist in a multi-select picklist. • `Equals`—Use to check if the input value equals to the configured value in the rule. • `ExistsIn`—Use to check if the input value exists in a multi-select picklist. • `GreaterOrEqual`—Use to check if the input value is greater than or equal to the configured value in the rule. • `GreaterThan`—Use to check if the input value is greater than the configured value in the rule.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		• `LessOrEqual`—Use to check if the input value is less than or equal to the configured value in the rule. • `LessThan`—Use to check if the input value is less than the configured value in the rule. • `Matches`—Use to check if the input value is a substring of the value in the rule. • `NotEquals`—Use to check if the input value doesn't equal to the configured value in the rule. Note: The operator specified here overrides the operator defined in Decision Table.		
`sourceObject`	String	The name of the source object for the input field. If the dataset link is configured with a single source object, the source object field isn't mandatory.	Optional Note: This field is required only when the dataset link definition contains multiple source objects.	55.0

SEE ALSO:

Supported Data Types and Operators

Decision Table Condition List Input

Input representation of the Decision Table condition list.

Properties

Name	Type	Description	Required or Optional	Available Version
`conditions`	Decision Table Condition[]	The details of the decision table conditions on which the decision table executes and provides outcomes.	Required	58.0

Decision Table Input

Input representation of a decision table.

JSON example

```
{
   "conditions":[
      {
         "conditionsList":[
            {
               "fieldName":"Product__c",
               "value":"Nike",
               "operator":"Matches"
            },
            {
               "fieldName":"Price__c",
               "value":1000,
               "operator":"GreaterThan"
            }
         ]
      },
      {
         "conditionsList":[
            {
               "fieldName":"Product__c",
               "value":"Adidas",
               "operator":"Matches"
            },
            {
               "fieldName":"Price__c",
               "value":1500,
               "operator":"GreaterThan"
            }
         ]
      }
   ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
conditions	Decision Table Condition[]	The list of decision table conditions on which the decision table executes and provides outcomes.	Required	55.0
datasetLinkName	String	The API name of the dataset link provided as an input for the decision table execution.	Optional	55.0

Decision Table Definition Input

Input representation of a decision table definition.

Properties

Name	Type	Description	Required or Optional	Available Version
`collectOperator`	String	Operator to apply a filter to outputs. Valid values are: • `Count` • `Maximum` • `Minimum` • `None` • `Sum`	Optional	58.0
`conditionCriteria`	String	Custom logic applied on the decision table columns to decide how the input fields are processed.	Optional Required when the condition type is `Custom`.	58.0
`conditionType`	String	Condition logic for input fields. Valid values are: • `All` • `Any` • `Custom`	Optional	58.0
`description`	String	Description of the decision table.	Optional	58.0
`decisionResultPolicy`	String	Results policy to filter results of the decision table. Valid values are: • `AnyValue` • `CollectOperator—For internal use only` • `FirstMatch` • `OutputOrder` • `Priority—For internal use only` • `RuleOrder—For internal use only` • `UniqueValues—For internal use only`	Optional	58.0
`doesConsiderNullValue`	Boolean	Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`). The default value is `false`.	Optional	60.0
`fullName`	String	Unique name of the rule definition.	Required	58.0

Name	Type	Description	Required or Optional	Available Version
`isSetCollectOperator`	Boolean	For internal use only. Indicates whether the `collectOperator` is enabled (`true`) or not (`false`).	Optional	58.0
`isSetConditionCriteria`	Boolean	For internal use only. Indicates whether the `conditionCriteria` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetConditionType`	Boolean	For internal use only. Indicates whether the `conditionType` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetDescription`	Boolean	For internal use only. Indicates whether the `description` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetDecisionResultPolicy`	Boolean	For internal use only. Indicates whether the `DecisionResultPolicy` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetFullName`	Boolean	For internal use only. Indicates whether the `FullName` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetParameters`	Boolean	For internal use only. Indicates whether the `parameters` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSetupName`	Boolean	For internal use only. Indicates whether the `setupName` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceconditionLogic`	Boolean	For internal use only. Indicates whether the `sourceConditionLogic` field is enabled (`true`) or not (`false`).	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
`isSetSourceCriteria`	Boolean	For internal use only. Indicates whether the `sourceCriteria` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceObject`	Boolean	For internal use only. Indicates whether the `sourceObject` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetSourceType`	Boolean	For internal use only. Indicates whether the `sourceType` is enabled (`true`) or not (`false`).	Optional	58.0
`isSetType`	Boolean	For internal use only. Indicates whether the `type` field is enabled (`true`) or not (`false`).	Optional	58.0
`isSetUsageType`	Boolean	For internal use only. Indicates whether the `UsageType` field is enabled (`true`) or not (`false`).	Optional	58.0
`parameters`	Decision Table Parameter Input[]	Array of input and output fields for the decision table.	Optional	58.0
`setupName`	String	Name of the decision table.	Required	58.0
`sourceconditionLogic`	String	Custom logic to filter the decision table rows.	Optional	58.0
`sourceCriteria`	Decision Table Source Criteria Input[]	Output array representation of source filters for the decision table rows, such as, `fieldName`, `operators`, `valueType`, and more.	Optional	58.0
`sourceObject`	String	Object containing business rules for the decision table to read.	Required	58.0
`sourceType`	String	Type of source to obtain decision table data. Valid values are: • `CsvUpload` • `MultipleSobjects` • `SingleSobject`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
`status`	String	Status of the decision table. Valid values are: • `ActivationInProgress` • `ActivationInProgress` • `Draft` • `Inactive`	Required	58.0
`type`	String	Type of the decision table. Valid values are: • `HighVolume` • `LowVolume`	Optional	58.0
`usageType`	String	Process type that uses the decision table. Valid values are: • `Pricing` • `ProductEligibility`	Optional	58.0

Decision Table Parameter Input

Input representation of parameters defined for the decision table.

Root XML tag

Properties

Name	Type	Description	Required or Optional	Available Version
`columnMapping`	String	Source object path for mapping to the column of an entity. Use this field to specify input and output fields from multiple source objects.	Optional	58.0
`dataType`	String	Data type of the field used. Possible values are: • `Boolean` • `Currency` • `Date` • `Number` • `Percent` • `String`	Optional	58.0
`decimalScale`	Integer	Precision of the field used.	Optional	58.0
`domainEntity`	String	Entity domain the field is mapped to.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
`fieldName`	String	Name of the field to be used in the decision table.	Required	58.0
`isGroupByField`	Boolean	Indicates whether the field is used to group the business rules of the decision table (`true`) or not (`false`).	Optional	58.0
`isPriority`	Boolean	Indicates whether it's a priority field (`true`) or not (`false`).	Optional	58.0
`maxlength`	Integer	Maximum length of the field used.	Optional	58.0
`operator`	String	Valid operators for a field based on its usage. Possible values are: • `Between` • `DoesNotExistIn` • `Equals` • `ExistsIn` • `GreaterOrEqual` • `GreaterThan` • `LessOrEqual` • `LessThan` • `Matches` • `NotEquals`	Optional	58.0
`sequence`	Integer	Sequence in which input fields are processed.	Optional	58.0
`sortType`	String	Type of sorting to be done on the rows of a decision table. Possible values are: • `AscNullFirst`- Sort row values in ascending order, showing null values first. • `AscNullLast`- Sort row values in ascending order, showing null values last. • `DescNullFirst`- Sort row values in descending order, showing null values first. • `DescNullLast`- Sort row values in descending order, showing null values last. • `None` - Show rows as they are without sorting.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
`usage`	String	Usage type for a field. Possible values are: • `Input` • `Output`	Required	58.0

Decision Table Source Criteria Input

Input representation of source criteria for the decision table.

Root XML tag

Properties

Name	Type	Description	Required or Optional	Available Version
`operator`	String	Operator used in the filter criteria. Possible values are: • `Contains` • `DoesNotContain` • `Equals` • `GreaterThan` • `GreaterThanOrEqual` • `IsNotNull` • `IsNull` • `LessThan` • `LessThanOrEqual` • `NotEqual`	Required	58.0
`sequenceNumber`	Integer	Sequence number of the filter criteria in the associated decision table source condition.	Optional	58.0
`sourceFieldName`	String	Name of the field in the filter criteria.	Required	58.0
`value`	String	Expected value of the field.	Optional	58.0
`valueType`	String	Type of a filter value. Possible values are: • `Formula` • `Literal` • `Lookup` • `Parameter` • `PickList`	Required	58.0

Response Bodies

Lookup Table API includes these response bodies.

Decision Matrix Lookup Basic Result
Results from a Decision Matrix lookup using a single input.

Decision Matrix Lookup Result
Output representation of the individual output of a decision matrix version lookup.

Decision Model Export Error
Error representation of a failed DMN (Decision Model Notation) export request.

Decision Model Export Output
Output representation of a completed DMN (Decision Model Notation) export request.

Decision Table Bulk Outcome
Output representation of the decision table bulk look-up.

Decision Table Definition Output
Output representation of a decision table definition associated with a decision table.

Decision Table Outcome
Output representation of the decision table execution.

Decision Table Outcome Item
Output representation of the decision table outcome item.

Decision Table Output
Output representation of the decision table details.

Decision Table Parameter Output
Output representation of a decision table parameter.

Decision Table Source Criteria Output
Output representation of the decision table source criteria.

Lookup Table Details
Output representation of the basic details of a lookup table.

Lookup Tables Result List
Output representation of the result of a lookup table search request.

Decision Matrix Lookup Basic Result

Results from a Decision Matrix lookup using a single input.

Property Name	Type	Description	Filter Group and Version	Available Version
`error`	String	The message stating the reason for the error.	Small, 55.0	55.0
`results`	Variable Output[]	The list of outputs for the specified input variable values.	Small, 55.0	55.0

Decision Matrix Lookup Result

Output representation of the individual output of a decision matrix version lookup.

JSON example

```
{
  "outputs": [
    {
      "results": [],
      "error": "Input Data is Missing"
    },
    {
      "results": [
        {
          "name": "premium",
          "value": "2400"
        },
        {
          "name": "tax",
          "value": "300"
        }
      ]
    },
    {
      "results": [],
      "error": "There is no output for the given input data"
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`outputs`	Decision Matrix Lookup Basic Result[]	List of outputs returned by a decision matrix. An output may contain multiple variables.	Small, 55.0	55.0

Decision Model Export Error

Error representation of a failed DMN (Decision Model Notation) export request.

Property Name	Type	Description	Filter Group and Version	Available Version
`errorCode`	String	Error code corresponding to the failed export request.	Small, 58.0	58.0
`errorMessage`	String	Error message corresponding to the failed export request.	Small, 58.0	58.0
`recordId`	String	Version ID of the decision matrix for which the data export request failed.	Small, 58.0	58.0

Decision Model Export Output

Output representation of a completed DMN (Decision Model Notation) export request.

JSON example

```
{
   "message":"OK",
   "success":true,
   "errors":[
      {
         "errorCode":"BAD_REQUEST",
         "errorMessage":"We couldn’t find this record. Specify a valid ID for
decisionModelEntityIds parameter.",
         "recordId":"0lNRO00000004fsdfAA"
      }
   ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`errors`	Decision Model Export Error[]	List of errors corresponding to a failed export request.	Small, 58.0	58.0
`message`	String	Response message from the completed export request.	Small, 58.0	58.0
`success`	Boolean	Indicates whether the export request was successful (`true`) or not (`false`).	Small, 58.0	58.0

Decision Table Bulk Outcome

Output representation of the decision table bulk look-up.

Property Name	Type	Description	Filter Group and Version	Available Version
`outputs`	Decision Table Outcome	List of the output of the Decision Table bulk lookup.	Small, 58.0	58.0

Decision Table Definition Output

Output representation of a decision table definition associated with a decision table.

Property Name	Type	Description	Filter Group and Version	Available Version
`collectOperator`	String	Operator applied to outputs. Valid values are: • `Count` • `Maximum`	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
		• `Minimum` • `None` • `Sum`		
`conditionCriteria`	String	Custom logic for deciding how the input fields are processed.	Small, 58.0	58.0
`conditionType`	String	Condition logic for input fields. Valid values are: • `All` • `Any` • `Custom`	Small, 58.0	58.0
`decisionResultPolicy`	String	Results policy to specify the result of the decision table. Valid values are: • `AnyValue` • `CollectOperator—For internal use only` • `FirstMatch` • `OutputOrder` • `Priority—For internal use only` • `RuleOrder—For internal use only` • `UniqueValues—For internal use only`	Small, 58.0	58.0
`description`	String	Description of the decision table.	Small, 58.0	58.0
`doesConsiderNullValue`	Boolean	Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`). The default value is `false`.	Small, 60.0	60.0
`fullName`	String	Unique name of the rule definition.	Small, 58.0	58.0
`id`	String	ID of the decision table.	Small, 58.0	58.0
`parameters`	Decision Table Parameter Output[]	Array of input fields defined for the decision table.	Small, 58.0	58.0
`setupName`	String	Name of the decision table.	Small, 58.0	58.0
`sourceCriteria`	Decision Table Source Criteria Output[]	Output array representation of source filters.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
`sourceObject`	String	Object containing business rules for the decision table to read.	Small, 58.0	58.0
`sourceType`	String	Type of source used to obtain decision table data. Valid values are: • `CsvUpload` • `MultipleSobjects` • `SingleSobject`	Small, 58.0	58.0
`sourceconditionLogic`	String	Custom logic for deciding how criteria on source is applied.	Small, 58.0	58.0
`status`	String	Status of the decision table. Valid values are: • `ActivationInProgress` • `ActivationInProgress` • `Draft` • `Inactive`	Small, 58.0	58.0
`usageType`	String	Process type that uses the decision table. Valid values are: • `Pricing` • `ProductEligibility`	Small, 58.0	58.0

Decision Table Outcome

Output representation of the decision table execution.

JSON example

```
{
  "errorCode" : null,
  "errorMessage" : null,
  "outcomeList" : [ {
    "values" : {
      "amount__c" : "399",
      "Name" : "MH 005"
    }
  }, {
    "values" : {
      "amount__c" : "499",
      "Name" : "MH 006"
    }
  }, {
    "values" : {
      "amount__c" : "379",
      "Name" : "MH 007"
    }
```

```
  }, {
    "values" : {
      "amount__c" : "1498",
      "Name" : "MH 008"
    }
  }, {
    "values" : {
      "amount__c" : "98",
      "Name" : "MH 009"
    }
  }, {
    "values" : {
      "amount__c" : "251",
      "Name" : "MH 010"
    }
  } ],
  "outcomeType" : "Multiple Matches",
  "successStatus" : true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errorCode	Integer	The error code if transaction fails for any reason.	Small, 55.0	55.0
errorMessage	String	The error message if transaction fails for any reason.	Small, 55.0	55.0
outcomeList	Decision Table Outcome Item[]	Outcome list that stores two or more outcomes provided by the decision table.	Small, 55.0	55.0
outcomeType	String	The outcome type after the request is successful.	Small, 55.0	55.0
successStatus	Boolean	Indicates the status of the decision table execution.	Small, 55.0	55.0

Decision Table Outcome Item

Output representation of the decision table outcome item.

Property Name	Type	Description	Filter Group and Version	Available Version
values	Map<String, Object>	The list of outcomes provided by the decision table. If the decision table is configured to sort outcomes based on an input field or the output field, then the outcomes are provided based on the selected sort order.	Small, 55.0	55.0

Decision Table Output

Output representation of the decision table details.

JSON example for GET, POST, and PATCH


```
{
   "code":"200",
   "decisionTable":{
      "collectOperator":"Count",
      "conditionCriteria":"1 OR 2 OR 3",
      "conditionType":"Any",
      "decisionResultPolicy":"FirstMatch",
      "doesConsiderNullValue": true,
      "description":"Eligiblity of Products using Qualification Rules",
      "id":"0lDxx00000000BJ",
      "parameters":[
         {
            "fieldName":"IsDeleted",
            "isGroupByField":false,
            "isPriority":false,
            "operator":"Equals",
            "sequence":1,
            "usage":"Input"
         },
         {
            "fieldName":"CreatedById",
            "isGroupByField":false,
            "isPriority":false,
            "usage":"Output"
         },
         {
            "fieldName":"Title",
            "isGroupByField":false,
            "isPriority":false,
            "operator":"Equals",
            "sequence":3,
            "usage":"Input"
         },
         {
            "fieldName":"Id",
            "isGroupByField":false,
            "isPriority":false,
            "operator":"Equals",
            "sequence":2,
            "usage":"Input"
         }
      ],
      "setupName":"Product Qualification eligibility3",
      "sourceCriteria":[

      ],
      "sourceObject":"AccountFeed",
      "sourceType":"SingleSobject",
      "sourceconditionLogic":"1 AND 2 AND 3",
      "status":"Draft"
```

```
    },
    "isSuccess":true,
    "message":""
}
```

JSON example for DELETE

```
{
    "code":"200",
    "isSuccess":true,
    "message":""
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`code`	String	Response code from the API request.	Small, 58.0	58.0
`decisionTable`	Decision Table Definition Output	Details of the decision table definition associated with the decision table.	Small, 58.0	58.0
`isSuccess`	Boolean	Indicates whether the API request is successful (`true`) or not (`false`).	Small, 58.0	58.0
`message`	String	Error message when the API request fails.	Small, 58.0	58.0

Decision Table Parameter Output

Output representation of a decision table parameter.

Property Name	Type	Description	Filter Group and Version	Available Version
`columnMapping`	String	Source object path for mapping to the column of an entity.	Small, 58.0	58.0
`dataType`	String	Data type of the field used. Possible values are: • `Boolean` • `Currency` • `Date` • `Number` • `Percent` • `String`	Small, 58.0	58.0
`decimalScale`	Integer	Precision of the field used.	Small, 58.0	58.0
`domainEntity`	String	Entity domain the field is mapped to.	Small, 58.0	58.0
`fieldName`	String	Name of the field to be used in the decision table.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
`isGroupByField`	Boolean	Indicates whether the field is used to group the business rules of the decision table (`true`) or not (`false`).	Small, 58.0	58.0
`isPriority`	Boolean	Indicates whether it is a priority field (`true`) or not (`false`).	Small, 58.0	58.0
`maxlength`	Integer	Maximum length of the field used.	Small, 58.0	58.0
`operator`	String	Valid operators for a field based on its usage. Possible values are: • `Between` • `DoesNotExistIn` • `Equals` • `ExistsIn` • `GreaterOrEqual` • `GreaterThan` • `LessOrEqual` • `LessThan` • `Matches` • `NotEquals`	Small, 58.0	58.0
`sequence`	Integer	Sequence in which input fields are processed.	Small, 58.0	58.0
`sortType`	String	Type of sorting done on the rows of a decision table. Possible values are: • `AscNullFirst` • `AscNullLast` • `DescNullFirst` • `DescNullLast` • `None`	Small, 58.0	58.0
`usage`	String	Usage type for a field. Possible values are: • `Input` • `Output`	Small, 58.0	58.0

Decision Table Source Criteria Output

Output representation of the decision table source criteria.

Property Name	Type	Description	Filter Group and Version	Available Version
operator	String	Operator used in the filter criteria. Possible values are: • Contains • DoesNotContain • Equals • GreaterThan • GreaterThanOrEqual • IsNotNull • IsNull • LessThan • LessThanOrEqual • NotEqual	Small, 58.0	58.0
sequenceNumber	Integer	Sequence number of the filter criteria in the associated decision table source condition.	Small, 58.0	58.0
sourceFieldName	String	Name of the field in the filter criteria.	Small, 58.0	58.0
value	String	Expected value of the field.	Small, 58.0	58.0
valueType	String	Type of filter value. Possible values are: • Formula • Literal • Lookup • Parameter • PickList	Small, 58.0	58.0

Lookup Table Details

Output representation of the basic details of a lookup table.

JSON example

```
"lookupTables":[{
  "apiName":"DM_1",
  "id":"0lIxx0000000001EAA",
  "lookupTableDefinitionId":"9QNxx0000004C92GAE",
  "lookupTableType":"DecisionMatrix",
  "name":"DM_1"
},
{
  "apiName":"DT_2",
  "id":"0lIxx000000003FEAQ",
  "lookupTableDefinitionId":"0lDxx000000001dEAA",
```

```
    "lookupTableType":"DecisionTable",
    "name":"DT_2"
  }]
```

Property Name	Type	Description	Filter Group and Version	Available Version
apiName	String	Unique developer name of the Decision Table or Decision Matrix.	Small, 59.0	59.0
id	String	ID of the lookup table record.	Small, 59.0	59.0
lookupTableDefinitionId	String	ID of the Decision Table or Decision Matrix record.	Small, 59.0	59.0
lookupTableType	String	Type of the lookup table, such as Decision Table or Decision Matrix.	Small, 59.0	59.0
name	String	Name of the Decision Table or Decision Matrix.	Small, 59.0	59.0

Lookup Tables Result List

Output representation of the result of a lookup table search request.

JSON example

```
{
  "code": "200",
  "isSuccess": true,
  "lookupTables": [
    {
      "id": "0lIxx000000003FEAQ",
      "lookupTableDefinitionId": "0lDxx000000001dEAA",
      "lookupTableType": "DecisionTable",
      "name": "DT_Apr27_2",
      "apiName": "DT_Apr27_2"
    }
  ],
  "message": ""
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	Response code of the API request.	Small, 59.0	59.0
isSuccess	Boolean	Indicates whether the request is successful (true) or not (false).	Small, 59.0	59.0
lookupTables	Lookup Table Details[]	List of the retrieved lookup tables.	Small, 59.0	59.0
message	String	API response message if the request fails.	Small, 59.0	59.0

BusinessRule Namespace

The `BusinessRule` namespace provides classes for migrating calculation matrices and calculation procedures from Vlocity to the Business Rules Engine in Salesforce.

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

CalculationMatrixMigrationService Class
Contains methods for migrating calculation matrices from the Vlocity package to the Business Rules Engine as decision matrices.

CalculationProcedureMigrationService Class
Contains methods for migrating calculation procedures from the Vlocity package to the Business Rules Engine as expression sets.

SEE ALSO:

Apex Developer Guide: Getting Started with Apex

CalculationMatrixMigrationService Class

Contains methods for migrating calculation matrices from the Vlocity package to the Business Rules Engine as decision matrices.

Namespace

BusinessRule

Example

This example converts a list of calculation matrix IDs to decision matrix IDs and logs the result in the debug log.

```
List<String> ids = new List<String>();
ids.add('a03xx000004WhvkAAC');
ids.add('a03xx000004WhxMAAS');
ids.add('a03xx000004WhyyAAC');

System.debug('TO MIGRATE A LIST OF CALCULATION MATRICES');
System.debug(BusinessRule.CalculationMatrixMigrationService.migrate(ids, 'vlocity_ins'));
```

This example converts a calculation matrix ID to a decision matrix ID and logs the result in the debug log.

```
System.debug('TO MIGRATE A CALCULATION MATRIX');
System.debug(BusinessRule.CalculationMatrixMigrationService.migrate('a03xx000004Wi0aAAC',
 'vlocity_ins'));
```

CalculationMatrixMigrationService Methods

CalculationMatrixMigrationService Methods

The following are methods for `CalculationMatrixMigrationService`.

migrate(calculationMatrixIds, namespace)

Migrate calculation matrices from the Vlocity package to the Business Rules Engine as decision matrices.

migrate(calculationMatrixId, namespace)

Migrate a calculation matrix from the Vlocity package as a decision matrix to the Business Rules Engine.

migrate(calculationMatrixIds, namespace)

Migrate calculation matrices from the Vlocity package to the Business Rules Engine as decision matrices.

Signature

```
public static Map<String,Object> migrate(List<String> calculationMatrixIds, String
namespace)
```

Parameters

calculationMatrixIds

Type: List<String>

The 18-character IDs of the calculation matrices in the Vlocity managed package to be migrated to the Business Rules Engine as decision matrices.

namespace

Type: String

The namespace in which Vlocity is deployed as a managed package. For example, `vlocity_ins`. This contains the calculation matrix custom objects.

Return Value

Type: Map<String,Object>

migrate(calculationMatrixId, namespace)

Migrate a calculation matrix from the Vlocity package as a decision matrix to the Business Rules Engine.

Signature

```
public static Map<String,Object> migrate(String calculationMatrixId, String namespace)
```

Parameters

calculationMatrixId

Type: String

The 18-character ID of the calculation matrix in the Vlocity managed package to be migrated to the Business Rules Engine as a decision matrix.

namespace

Type: String

The namespace in which Vlocity is deployed as a managed package. For example, `vlocity_ins`. This contains the calculation matrix custom objects.

Return Value

Type: Map<String,Object>

CalculationProcedureMigrationService Class

Contains methods for migrating calculation procedures from the Vlocity package to the Business Rules Engine as expression sets.

Namespace

BusinessRule

Usage

Consider these guidelines before migrating a calculation procedure that uses a calculation matrix.

- Migrate the calculation matrix first. This creates a decision matrix.
- Add data to the decision matrix and activate it.

Example

This example converts a list of calculation procedure IDs to expression set IDs and logs the result in the debug log.

```
List<String> calcProcIds = new List<String>();
calcProcIds.add('a00xx000000boy5AAA');
calcProcIds.add('a00xx000000bozhAAA');
calcProcIds.add('a00xx000000bp1JAAQ');

System.debug('TO MIGRATE A LIST OF CALCULATION PROCEDURES');
System.debug(BusinessRule.CalculationProcedureMigrationService.migrate(calcProcIds,
'vlocity_ins'));
```

This example converts a calculation procedure ID to an expression set ID and logs the result in the debug log.

```
System.debug('TO MIGRATE A CALCULATION PROCEDURE');
System.debug(BusinessRule.CalculationProcedureMigrationService.migrate('a00xx000000bp2vAAA',
 'vlocity_ins'));
```

CalculationProcedureMigrationService Methods

CalculationProcedureMigrationService Methods

The following are methods for `CalculationProcedureMigrationService`.

migrate(calcProcedureIds, namespace)

Migrate calculation procedures from the Vlocity package as expression sets to the Business Rules Engine.

migrate(calcProcedureId, namespace)

Migrate a calculation procedure from the Vlocity package as an expression set to the Business Rules Engine.

`migrate(calcProcedureIds, namespace)`

Migrate calculation procedures from the Vlocity package as expression sets to the Business Rules Engine.

Signature

```
public static Map<String,Object> migrate(List<String> calcProcedureIds, String namespace)
```

Parameters

`calcProcedureIds`

Type: List<String>

The 18-character IDs of the calculation procedures in the Vlocity managed package to be migrated to the Business Rules Engine as expression sets.

18 character ID.

`namespace`

Type: String

The namespace in which Vlocity is deployed as a managed package. For example, `vlocity_ins`. This contains the calculation procedure custom objects.

Return Value

Type: Map<String,Object>

`migrate(calcProcedureId, namespace)`

Migrate a calculation procedure from the Vlocity package as an expression set to the Business Rules Engine.

Signature

```
public static Map<String,Object> migrate(String calcProcedureId, String namespace)
```

Parameters

`calcProcedureId`

Type: String

The 18-character ID of the calculation procedure in the Vlocity managed package to be migrated to the Business Rules Engine as an expression set.

`namespace`

Type: String

The namespace in which Vlocity is deployed as a managed package. For example, `vlocity_ins`. This contains the calculation procedure custom objects.

Return Value

Type: Map<String,Object>

Lookup Tables Invocable Actions

Use actions to invoke Lookup Table actions in a flow.

Note: You can also use the Invocable namespace, which contains the classes and methods required to invoke the Decision Matrix and Expression Set invocable actions from Apex. See Invocable Namespace.

Decision Matrix Actions

Invoke a decision matrix in a flow with the Decision Matrix Actions. A decision matrix is a user-defined table where you can look up an output based on the inputs you provide.

Decision Matrix Actions

Invoke a decision matrix in a flow with the Decision Matrix Actions. A decision matrix is a user-defined table where you can look up an output based on the inputs you provide.

For example, you can look up a candidate's eligibility to avail medical insurance in a decision matrix based on the candidate's age and gender.

These actions are available in API version 55.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v55.0/actions/custom/runDecisionMatrix/{UniqueName}`

Note: The value of UniqueName is the unique identifier of the record, which is sourced from the name of a decision matrix.

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Inputs

Vary depending on the selected decision matrix.

Outputs

Vary depending on the inputs of the selected decision matrix.

Usage

Sample Request

Here's an example POST request that has the inputs, such as, age and state:

```
{
   "inputs":[
      {
```

```
            "age":"25",
            "state":"NY"
         },
         {
            "age":"25",
            "state":"CA"
         },
         {
            "age":"",
            "state":"WA"
         }
      ]
}
```

Sample Response

Here's an example response that has the premium and tax values based on the inputs provided in the example request.

```
[
   {
      "actionName":"premiumTaxLookup",
      "errors":null,
      "isSuccess":true,
      "outputValues":{
         "premium":2400.0,
         "tax":200.0
      }
   },
   {
      "actionName":"premiumTaxLookup",
      "errors":null,
      "isSuccess":true,
      "outputValues":{
         "premium":2400.0,
         "tax":200.0
      }
   },
   {
      "actionName":"premiumTaxLookup",
      "errors":[
         {
            "statusCode":"REQUIRED_FIELD_MISSING",
            "message":"Missing required input parameter: age",
            "fields":[
            ]
         }
      ],
      "isSuccess":false,
      "outputValues":null
   }
]
```

Lookup Tables Metadata API Types

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

DecisionMatrixDefinition

Represents a definition of a decision matrix.

Flow for Lookup Tables

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.

SEE ALSO:

Metadata API Developer Guide: Understanding Metadata API

DecisionMatrixDefinition

Represents a definition of a decision matrix.

Note: Before deploying a decision matrix or a decision matrix version to a target org, review these decision matrix migration considerations.

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

File Suffix and Directory Location

DecisionMatrixDefinition components have the suffix `.decisionMatrixDefinition` and are stored in the `decisionMatrixDefinition` folder.

Version

DecisionMatrixDefinition components are available in API version 55.0 and later.

Fields

Field Name	Description
`description`	**Field Type** string **Description** Describes a decision matrix definition.
`groupKey`	**Field Type** string **Description** A key for grouping matrix rows in different versions, such as a geographic region or a product code.
`label`	**Field Type** string

Field Name	Description
	Description Required. The UI label of a decision matrix definition.
`processType`	**Field Type** ExpsSetProcessType (enumeration of type string) **Description** The process type that uses the expression set rule. Valid values are: • `Bre` • `GpaCalculation` • `PlanCostCalculation` • `RatingDiscovery` • `StudentSuccess` Note: When Business Rules Engine is enabled for a Salesforce instance, the default value is '`Bre`'. Other usage types may be available to you depending on your industry solution and permission sets. Available in API version 59.0 and later.
`subGroupKey`	**Field Type** string **Description** A subgroup key for grouping matrix rows in different versions, such as a geographic region or a product code. For example, if the `groupKey` is `Country`, the `subGroupKey` can be `State` or `Province`.
`type`	**Field Type** DecisionMatrixType (enumeration of type string) **Description** The type of a decision matrix. Valid values are: • `Grouped` • `Standard`
`versions`	**Field Type** DecisionMatrixDefinitionVersion[] **Description** Represents an array of decision matrix version definitions in a decision matrix. This array must contain at least one version.

DecisionMatrixDefinitionVersion

Represents a definition of a decision matrix version.

Field Name	Description
`columns`	**Field Type** DecisionMatrixDefinitionVersionColumn[] **Description** Represents an array of columns in a decision matrix definition version.
`decisionMatrixDefinition`	**Field Type** string **Description** The full name of a decision matrix version.
`endDate`	**Field Type** dateTime **Description** The date until which a decision matrix definition version is available for use.
`groupKeyValue`	**Field Type** string **Description** The value of the `groupKey` for a decision matrix definition version. For example, if the `groupKey` is `Country`, the `groupKeyValue` can be `United States`.
`label`	**Field Type** string **Description** Required. The UI label of a decision matrix definition version.
`startDate`	**Field Type** dateTime **Description** Required. The date from when a decision matrix definition version is available for use.
`status`	**Field Type** DecisionMatrixDefStatus (enumeration of type string) **Description** Required. Specifies the status of a decision matrix definition version.

Field Name	Description
	Valid values are: • `Active` • `Draft` • `Inactive` • `InvalidDraft` • `Obsolete`
`subGroupKeyValue`	**Field Type** string **Description** The value of the subgroup key for a decision matrix definition version. For example, if the `subGroupKey` is `State` or `Province`, the `subGroupKeyValue` can be `California`.
`versionNumber`	**Field Type** int **Description** Required. The version number of a decision matrix definition.

DecisionMatrixDefinitionVersionColumn

Represents a definition of a column in a decision matrix definition version.

Field Name	Description
`columnType`	**Field Type** DecisionMatrixColumnType (enumeration of type string) **Description** Required. Specifies whether a column is for an input or output. Valid values are: • `Input` • `Output`
`dataType`	**Field Type** DecisionMatrixDataType (enumeration of type string) **Description** Required. The type of data that's stored in a column.

Field Name	Description
	Valid values are: • `Boolean` • `Currency` • `Number` • `NumberRange` • `Percent` • `Text` • `TextRange`
`displaySequence`	**Field Type** int **Description** Required. Represents the position of a column in the column order.
`isWildcardColumn`	**Field Type** boolean **Description** Required. Specifies whether a column stores a wildcard value (`true`) or not (`false`). The default value is `false`.
`name`	**Field Type** string **Description** Required. The full name of a decision matrix definition version column.
`rangeValue`	**Field Type** string **Description** A list of values that define range boundaries.
`wildcardValue`	**Field Type** string **Description** The wildcard value such as `ALL`.

Declarative Metadata Sample Definition

The following is an example of a DecisionMatrixDefinition component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DecisionMatrixDefinition
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <label>HealthCloudUM_ValidRegions</label>
 <type>Standard</type>
 <versions>
  <fullName>HealthCloudUM_ValidRegions_V1</fullName>
  <columns>
   <columnType>Input</columnType>
   <dataType>Text</dataType>
   <displaySequence>2</displaySequence>
   <isWildcardColumn>false</isWildcardColumn>
   <name>State</name>
  </columns>
  <columns>
   <columnType>Input</columnType>
   <dataType>Text</dataType>
   <displaySequence>1</displaySequence>
   <isWildcardColumn>false</isWildcardColumn>
   <name>City</name>
  </columns>
  <columns>
   <columnType>Output</columnType>
   <dataType>Boolean</dataType>
   <displaySequence>3</displaySequence>
   <isWildcardColumn>false</isWildcardColumn>
   <name>IsValid</name>
  </columns>
  <decisionMatrixDefinition>HealthCloudUM_ValidRegions</decisionMatrixDefinition>
  <label>HealthCloudUM_ValidRegions V1</label>
  <startDate>2022-05-02T13:04:06.000Z</startDate>
  <status>Draft</status>
  <versionNumber>1</versionNumber>
 </versions>
</DecisionMatrixDefinition>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>*</members>
  <name>DecisionMatrixDefinition</name>
 </types>
 <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Flow for Lookup Tables

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

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

Field Name	Field Type	Description
`actionType`	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Lookup Tables include: • `runDecisionMatrix`—Invoke a decision matrix in a flow. This value is available in API version 55.0 and later.

Lookup Tables 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.

EDITIONS

Available in: Lightning Experience

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

DecisionMatrixDefinition

Represents information about a decision matrix definition. This object is available in API version 55.0 and later.

DecisionMatrixDefinitionVersion

Represents information about a decision matrix definition version. This object is available in API version 55.0 and later.

DecisionTable

Represents the information about a decision table. This object is available in API version 51.0 and later.

DecisionTableDatasetLink

Represents a dataset link associated with a decision table. Use dataset links in a decision table to select an object whose records the decision table must evaluate and provide outcomes for. This object is available in API version 51.0 and later.

DecisionTableParameter

Represents an input or output field in a decision table. An input field is a field in the business rule object or custom metadata type that contains values used by the decision table to evaluate records and values. An output field is a field in the business rule object or custom metadata type that contains the values provided as outcomes for a rule. This object is available in API version 51.0 and later.

DecisionTblDatasetParameter

Represents the mapping between a decision table parameter and a field of the object selected in the dataset link. This mapping allows the decision table to know which object fields from the dataset link must be evaluated by the input fields of the decision table. This object is available in API version 51.0 and later.

DecisionTableSourceCriteria

Represents the fields and values from a data source that are used to define the condition logic of the data that's used in a decision table. This object is available in API version 59.0 and later.

SEE ALSO:

Developer Guide: Introducing Tooling API

DecisionMatrixDefinition

Represents information about a decision matrix definition. This object is available in API version 55.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the decision matrix definition.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** Full name of the associated metadata 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`	**Type** picklist

Field	Details
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language in which this decision matrix definition is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released

Field	Details
	• `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label of the decision matrix definition.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Decision matrix definition metadata.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

DecisionMatrixDefinitionVersion

Represents information about a decision matrix definition version. This object is available in API version 55.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DecisionMatrixDefinitionId`	**Type** reference

Field	Details
	Properties Filter, Group, Sort **Description** The decision matrix definition associated with this decision matrix definition version. This is a required field. This field is a relationship field. **Relationship Name** DecisionMatrixDefinition **Relationship Type** Lookup **Refers To** DecisionMatrixDefinition
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the decision matrix definition version.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** Full name of the associated metadata 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`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language in which this decision matrix definition version is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico)

Field	Details
	• `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)
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label of the decision matrix definition version.
`Metadata`	**Type** complexvalue

Field	Details
	Properties Create, Nillable, Update **Description** Decision matrix definition version metadata.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.
`Status`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The status of this decision matrix definition version. Possible values are: • `Active` • `Draft` • `Inactive` • `InvalidDraft` • `Obsolete` The default value is `Draft`.
`VersionNumber`	**Type** int **Properties** Filter, Group, Sort **Description** The version number of this decision matrix definition version. This is a required field.

DecisionTable

Represents the information about a decision table. This object is available in API version 51.0 and later.

Note: 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`

Fields

Field	Details
`CollectOperator`	**Type** string **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** For internal use only.
`ConditionCriteria`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Custom logic that's used to decide how the input fields are processed.
`ConditionType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Condition logic that's used for input fields. Possible values are: • `All`—All conditions are met (AND) • `Any`—Any condition is met (OR) • `Custom`—Custom Logic The default value is 'All'.
`DataSourceType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	Description Type of data source that's used to create a decision table. Available in API version 59.0 and later. Valid values are: • `MultipleSobjects`—Multiple sObjects • `SingleSobject`—Single sObject The default value is `SingleSobject`.
`DecisionTableParameters`	**Type** QueryResult **Properties** Nillable **Description** Input or output field in a decision table.
`DecisionTableSourceCriterias`	**Type** QueryResult **Properties** Nillable **Description** Filter criteria that's associated with the decision table condition. Available in API version 59.0 and later.
`Description`	**Type** textarea **Properties** Filter, Nillable, Sort **Description** Description of the decision table.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** Developer name of the decision table.
`DoesConsiderNullValue`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Nillable, Sort

Field	Details
	Description Indicates whether a column that has a null value is considered for lookup (`true`) or not (`false`). The default value is `false`. Available in API version 60.0 and later.
`FilterResultBy`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** If a collection of inputs returns multiple matching outputs, then the `FilterResultBy` field specifies how the results of a decision table are filtered. Available in API version 59.0 and later. Valid values are: • `AnyValue`—Any Value • `FirstMatch`—First Match • `OutputOrder`—Output Order
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** Name of the decision table. 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`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Language in which the decision table is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish

Field	Details
	• `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)
`LastSyncDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Latest date on which the decision table was refreshed.
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort

Field	Details
	Description Label of the decision table.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Metadata of the decision table. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix that's associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values. • In Developer Edition orgs, `NamespacePrefix` is set to the namespace prefix of the org for all objects that support it, unless 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 org of the package developer. • In orgs that aren't Developer Edition orgs, `NamespacePrefix` is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
`PricingElementDecisionTables`	**Type** QueryResult **Properties** Nillable **Description** Reserved for future use.
`RefreshFailureReason`	**Type** string

Field	Details
	Properties Filter, Nillable, Sort **Description** Reason for the refresh of the decision table data to fail. Available in API version 60.0 and later.
`RefreshStatus`	**Type** string **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Refresh status of the cached data in the decision table. Available in API version 60.0 and later. Valid values are: • `Initiated` • `Failed` • `Completed` • `In Progress`
`SetupName`	**Type** string **Properties** Filter, Group, Sort **Description** Required. Name of the decision table, which appears in Setup.
`SourceConditionLogic`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Condition logic that's used to define the decision table from the source data. Available in API version 59.0 and later.
`SourceObject`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Required. Object that contains the rules based on which the decision table must provide outcomes.

Field	Details
`Status`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Required. Status of the decision table. Valid values are: • `ActivationInProgress` • `Active` • `Draft` • `Inactive`
`Type`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Determine whether a decision table's data volume is high or low. Available in API version 59.0 and later. Valid values are: • `HighVolume`–Reserved for future use • `LowVolume` • `HighScaleExecution` The default value is `LowVolume`.
`UsageType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Usage type of the decision table. Available in API version 59.0 and later. Valid value is `Bre`. The default value is `Bre`. When Business Rules Engine is enabled for a Salesforce org, the default value is `Bre`. Other usage types may be available to you depending on your industry solution and permission sets.

DecisionTableDatasetLink

Represents a dataset link associated with a decision table. Use dataset links in a decision table to select an object whose records the decision table must evaluate and provide outcomes for. This object is available in API version 51.0 and later.

Note: 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`

Fields

Field	Details
`DecisionTableId`	**Type** reference **Properties** Filter, Group, Sort **Description** Required. The unique identifier of the associated decision table. This is a relationship field. **Relationship Name** DecisionTable **Relationship Type** Lookup **Refers To** DecisionTable
`Description`	**Type** textarea **Properties** Filter, Nillable, Sort **Description** The description of the dataset link.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort

Field	Details
	Description The developer name of the dataset link.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** The name of the decision table dataset link. 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.
`IsDefault`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates whether a dataset link is the default dataset link for a decision table.
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language in which the dataset link is created. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil)

Field	Details
	• `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label of the dataset link.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Decision table dataset link metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`NamespacePrefix`	**Type** string

Field	Details
	Properties Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***namespacePrefix__componentName*** notation. The namespace prefix can have one of the following values. • In Developer Edition orgs, `NamespacePrefix` is set to the namespace prefix of the org for all objects that support it, unless 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 org of the package developer. • In orgs that are not Developer Edition orgs, `NamespacePrefix` is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
`SetupName`	**Type** string **Properties** Filter, Group, Sort **Description** Required. The name of the dataset link, which appears in Setup.
`SourceObject`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the dataset link's source object.

DecisionTableParameter

Represents an input or output field in a decision table. An input field is a field in the business rule object or custom metadata type that contains values used by the decision table to evaluate records and values. An output field is a field in the business rule object or custom metadata type that contains the values provided as outcomes for a rule. This object is available in API version 51.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DecisionTableId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The unique identifier of the associated decision table. This is a relationship field. **Relationship Name** DecisionTable **Relationship Type** Lookup **Refers To** DecisionTable
`DomainObject`	**Type** string **Properties** Create, Filter, Group, Sort **Description** For polymorhpic fields, indicates the domain object in the field hierarchy. This field is available in API version 59.0 and later.
`FieldName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The API name of the field that's selected as an input or output for the decision table.
`FieldPath`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The path of the field used in a decision table in relation to the object that the field belongs to.

Field	Details
	This field is available in API version 59.0 and later.
`IsGroupByField`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether an input field is used to group the business rules of the decision table (`true`) or not (`false`). The default value is `false`'. This field is available in API version 55.0 and later.
`IsRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a field is required to have input values when a look up is performed on the decision table (`true`) or not (`false`). The default value is `false`'. This field is available in API version 59.0 and later.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`Operator`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The operator used for the input field. Possible values are: • `DoesNotExistsIn` • `Contains` • `Equals` • `ExistsIn` • `GreaterOrEqual` • `GreaterThan` • `LessOrEqual` • `LessThan` • `Matches` • `DoesNotMatch` • `NotEquals`
`Sequence`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The sequence in which input fields are processed.
`SortType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Sort outputs of a decision table based on the values of the input or output parameter field. This field is available in API version 56.0 and later. Possible values are: • `AscNullFirst` • `AscNullLast` • `DescNullFirst` • `DescNullLast` • `None` The default value is `None`. Outputs can't be sorted based on picklist and multi-select picklist fields.

Field	Details
`Usage`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. The usage type of a field. Possible values are: • `INPUT` • `OUTPUT`

DecisionTblDatasetParameter

Represents the mapping between a decision table parameter and a field of the object selected in the dataset link. This mapping allows the decision table to know which object fields from the dataset link must be evaluated by the input fields of the decision table. This object is available in API version 51.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DatasetFieldName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Required. The name of the field whose value must be compared against an input type decision table parameter when providing the outcome.
`DatasetSourceObject`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The object whose field values are evaluated by the associated decision table to provide outcomes.
`DecisionTableDatasetLinkId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The unique identifier of the associated decision table dataset link. This is a relationship field. **Relationship Name** DecisionTableDatasetLink **Relationship Type** Lookup **Refers To** DecisionTableDatasetLink
`DecisionTableParameterId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The unique identifier of the associated decision table parameter. This is a relationship field. **Relationship Name** DecisionTableParameter **Relationship Type** Lookup **Refers To** DecisionTableParameter
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted`

Field	Details
	• deprecated • deprecatedEditable • installed • installedEditable • released • unmanaged

DecisionTableSourceCriteria

Represents the fields and values from a data source that are used to define the condition logic of the data that's used in a decision table. 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`

Fields

Field	Details
DecisionTableId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the decision table that's associated with the source criteria. This field is a relationship field. **Relationship Name** DecisionTable **Relationship Type** Lookup **Refers To** DecisionTable
ManageableState	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	Description Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`Operator`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The operator that's applied to an associated decision table's field to filter the data. Possible values are: • `DoesNotExistIn`–Does Not Exist In • `Equals` • `ExistsIn`–Exists In • `GreaterOrEqual`–Greater Than Or Equal • `GreaterThan`–Greater Than • `LessOrEqual`–Less Than Or Equal • `LessThan`–Less Than • `Matches` • `NotEquals`–Not Equals The default value is `Equals`.
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The sequence number used in the associated decision table's source condition logic.
`SourceFieldName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The name of the field that's used in the decision table.
`Value`	**Type** textarea **Properties** Create, Nillable, Update **Description** The value that's expected in the source field used in the decision table.
`ValueType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of the value that's used to filter the source data. Possible values are: • `Formula` • `Literal` • `Lookup` • `Parameter` • `Picklist` The default value is `Literal`.

CHAPTER 13 Criteria-Based Search and Filter

In this chapter ...

- Metadata API Types
- Tooling API Objects
- Business APIs

Configure a search based on a single searchable object that combines data that's spread across multiple objects and fields.

Metadata API Types

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

SearchableObjDataSyncInfo
Retrieve, deploy, update , create, and view searchable object data sync information for criteria-based search and filter.

SearchCriteriaConfiguration
Retrieve, deploy, update , create, and view search criteria configurations for criteria-based search and filter.

SearchResultActionConfig
Represents a collection of fields to set up the actions that a user can perform on results returned by criteria-based search.

SearchableObjDataSyncInfo

Retrieve, deploy, update , create, and view searchable object data sync information for criteria-based search and filter.

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

SearchableObjDataSyncInfo components have the suffix `SearchableObjDataSyncInfo.settings` and are stored in the `SearchableObjDataSyncInfo` folder.

Version

SearchableObjDataSyncInfo components are available in API version 58.0 and later.

Special Access Rules

There are no additional access requirements that are specific to this type.

Fields

Field Name	Description
`dataSyncActive`	**Field Type** boolean **Description** Indicates whether the data synchronization operation for the search object is active (`true`) or not (`false`). This value does not indicate the status of a Data Processing

Field Name	Description
	Engine (DPE) definition, but instead indicates the system job that executes that DPE definition.
`dataSyncJob`	**Field Type** string **Description** The data synchronization job that updates data in the searchable object at regular intervals.
`description`	**Field Type** string **Description** The description of a searchable object data sync information record. Note: Description length should not exceed 255 characters.
`displayFieldSet`	**Field Type** FieldSet **Description** The fieldset that determines how fields are displayed in the filter panel.
`lastDataSyncRunDate`	**Field Type** string **Description** The last date and time at which the data synchronization job ran. This field does not indicate the date and time when the Data Processing Engine (DPE) last ran, but rather it indicates when the system job that executes the DPE definition last ran.
`lookupMappings`	**Field Type** Object Mapping **Description** The mappings for `inputObject` to `outputObject` for lookup type fields.
`masterLabel`	**Field Type** string **Description** Required. A user-friendly name for the use case definition, which is defined when the use case definition is created.
`parsingFieldSet`	**Field Type** FieldSet

Field Name	Description
	Description The fieldset that determines how fields are parsed for criteria-based search and filter.
picklistMappings	**Field Type** Object Mapping **Description** The mappings for `inputObject` to `outputObject` for picklist type fields.
scheduleFrequencyInHours	**Field Type** string **Description** The frequency at which the data synchronization job is run to refresh data in the searchable object.
searchableObject	**Field Type** string **Description** Required. The object that's used for criteria-based search and filter.

Declarative Metadata Sample Definition

The following is an example of a SearchableObjDataSyncInfo component.

```
<?xml version="1.0" encoding="UTF-8"?>
<SearchableObjDataSyncInfo xmlns="http://soap.sforce.com/2006/04/metadata">
    <dataSyncActive>false</dataSyncActive>
    <displayFieldSet>
        <fullName>DisplayAssetSearch</fullName>
        <availableFields>
            <alternativeDisplayFormat>Picklist</alternativeDisplayFormat>
            <field>Country</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <alternativeDisplayFormat>Picklist</alternativeDisplayFormat>
            <field>City</field>
            <isRequired>false</isRequired>
        </availableFields>
        <description>DisplayTypes</description>
        <displayedFields>
            <alternativeDisplayFormat>Picklist</alternativeDisplayFormat>
            <field>Country</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
```

```
            <alternativeDisplayFormat>Picklist</alternativeDisplayFormat>
            <field>City</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <label>DisplayTypes</label>
    </displayFieldSet>
.   <parsingFieldSet>
        <fullName>ParsingAssetSearch</fullName>
        <availableFields>
            <field>SerialNumber</field>
            <isRequired>false</isRequired>
        </availableFields>
        <description>ParsingTypes</description>
        <displayedFields>
            <field>SerialNumber</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <label>ParsingTypes</label>
    </parsingFieldSet>
    <lookupMappings>
        <inputObject>Asset</inputObject>
        <mappingFields>
            <inputField>RootAssetId</inputField>
            <outputField>SerialNumber</outputField>
        </mappingFields>
        <outputObject>Asset</outputObject>
    </lookupMappings>
    <masterLabel>AssetSearch</masterLabel>
    <picklistMappings>
        <inputObject>Account</inputObject>
        <mappingFields>
            <inputField>AccountSource</inputField>
            <outputField>Name</outputField>
        </mappingFields>
        <outputObject>Asset</outputObject>
    </picklistMappings>
    <searchableObject>Asset</searchableObject>
</SearchableObjDataSyncInfo>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>SearchableObjDataSyncInfo</name>
    </types>
    <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

SearchCriteriaConfiguration

Retrieve, deploy, update , create, and view search criteria configurations for criteria-based search and filter.

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

SearchCriteriaConfiguration components have the suffix `SearchCriteriaConfiguration settings` and are stored in the `SearchCriteriaConfiguration` folder.

Version

SearchCriteriaConfiguration components are available in API version 58.0 and later.

Special Access Rules

There are no additional access requirements that are specific to this type.

Fields

Field Name	Description
`actionList`	**Field Type** string **Description** The list of actions that can be launched for a search result. Available in API version 59.0 and later.
`aggrCriteriaFieldset`	**Field Type** FieldSet **Description** The set of fields in the searchable object that can be used as aggregation criteria.
`configurationType`	**Field Type** SearchCriteriaConfigurationConfigurationType (enumeration of type string) **Description** Specifies the configuration type for criteria-based search and filter. Valid values are: • `Default Search`

Field Name	Description
	• `Clinical Trial Search`
`description`	**Field Type** string **Description** The description of a search criteria configuration record.
`distanceCriteria`	**Field Type** string **Description** A JSON string that stores the distance configuration attributes used in criteria-based search. The string includes these attributes: • `mapEnabled`—Indicates whether to show a map of search results (`true`) or not (`false`). • `mapMarkerTitleField`—The field value to use for the map marker title. • `mapMarkerDescriptionField`—The field value to use for the map marker description. • `options`—The higher limit for a distance range. • `referenceFieldApiName`—A location-type of field to calculate the distance from. • `sortByDistance`—Indicates whether to include distance criteria in sorting (`true`) or not (`false`) for search results displayed as cards. • `unit`—`Kilometers` or `Miles`.
`filterType`	**Field Type** SearchCriteriaConfigurationFilterType (enumeration of type string) **Description** Specifies the type of filter criteria to use for criteria-based search and filter. Valid values are: • `GROUPING_AND_AGGREGATION` • `MULTIPLE_FIELDS`
`isActive`	**Field Type** boolean **Description** Specifies if the search criteria configuration is active (`true`) or not (`false`).
`masterLabel`	**Field Type** string

Field Name	Description
	Description Required. A user-friendly name for the search criteria configuration, which is defined when the search criteria configuration is created.
`resultDisplayFormat`	**Field Type** SearchCriteriaConfigurationResultDisplayFormat (enumeration of type string) **Description** Specifies the display format of search results. Valid values are: • `LIST` • `CARD`
`resultFieldset`	**Field Type** FieldSet **Description** The set of fields in the searchable object that can be used as search result columns.
`resultFlexCard`	**Field Type** string **Description** The name of the OmniStudio FlexCard used to display search results as cards.
`searchCriteriaFieldset`	**Field Type** FieldSet **Description** The set of fields in the searchable object that can be used for querying data.
`searchableObjDataSyncInfo`	**Field Type** string **Description** The object that stores data sync information about the searchable object. Information such as whether the data sync job is active or not, and when the last data sync job was run.
`searchableObject`	**Field Type** string **Description** Required. The object that can be used for criteria-based search and filter.

Field Name	Description
sortingCriteriaFieldset	**Field Type** FieldSet **Description** The set of fields in the searchable object that can be used as sort criteria for search results.

Declarative Metadata Sample Definition

The following is an example of a SearchCriteriaConfiguration component.

```
<?xml version="1.0" encoding="UTF-8"?>
<SearchCriteriaConfiguration xmlns="http://soap.sforce.com/2006/04/metadata">
    <aggrCriteriaFieldset>
        <fullName>AggregCriteriaSearchCriteriaConfig</fullName>
        <availableFields>
            <field>Name</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <field>SerialNumber</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <field>StockKeepingUnit</field>
            <isRequired>false</isRequired>
        </availableFields>
        <description>SelectedGroupByColumns</description>
        <displayedFields>
            <field>Name</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>SerialNumber</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>StockKeepingUnit</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <label>SelectedGroupByColumns</label>
    </aggrCriteriaFieldset>
    <configurationType>DefaultSearch</configurationType>
    <description>This configuration is for the search criteria settings.</description>
    <filterType>GROUPING_AND_AGGREGATION</filterType>
    <isActive>true</isActive>
    <masterLabel>SearchCriteriaConfig</masterLabel>
    <resultDisplayFormat>CARD</resultDisplayFormat>
    <resultFlexCard>ReviewNotes</resultFlexCard>
    <searchCriteriaFieldset>
        <fullName>SearchCriteriaSearchCriteriaConfig</fullName>
```

```
        <availableFields>
            <field>RootAssetId</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <field>AccountId</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <field>Id</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <field>Product2Id</field>
            <isRequired>false</isRequired>
        </availableFields>
        <description>SelectedSearchFields</description>
        <displayedFields>
            <field>RootAssetId</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>AccountId</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>Id</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>Product2Id</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <label>SelectedSearchFields</label>
    </searchCriteriaFieldset>
    <searchableObjDataSyncInfo>AssetSearch</searchableObjDataSyncInfo>
    <searchableObject>Asset</searchableObject>
    <sortingCriteriaFieldset>
        <fullName>SortinCriteriaSearchCriteriaConfig</fullName>
        <availableFields>
            <field>AccountId</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <field>Id</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <field>Name</field>
            <isRequired>false</isRequired>
        </availableFields>
        <availableFields>
            <field>Product2Id</field>
            <isRequired>false</isRequired>
```

```
        </availableFields>
        <availableFields>
            <field>StockKeepingUnit</field>
            <isRequired>false</isRequired>
        </availableFields>
        <description>SelectedSortByColumns</description>
        <displayedFields>
            <field>AccountId</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>Id</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>Name</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>Product2Id</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <displayedFields>
            <field>StockKeepingUnit</field>
            <isRequired>false</isRequired>
        </displayedFields>
        <label>SelectedSortByColumns</label>
    </sortingCriteriaFieldset>
</SearchCriteriaConfiguration>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>SearchCriteriaConfiguration</name>
    </types>
    <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

SearchResultActionConfig

Represents a collection of fields to set up the actions that a user can perform on results returned by criteria-based search.

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

SearchResultActionConfig components have the suffix `.SearchResultActionConfigSettings` and are stored in the `SearchResultActionConfigSettings` folder.

Version

SearchResultActionConfig components are available in API version 59.0 and later.

Special Access Rules

This type is available if Criteria-Based Search and Filter is enabled in your org.

Fields

Field Name	Description
`actionReference`	**Field Type** string **Description** Required. The action that a user can launch for a search result. Specify the ID of an instance that corresponds to your action type.
`actionScope`	**Field Type** SearchResultActionScope (enumeration of type string) **Description** Required. Specifies the scope of the action that the user can launch. For example, select Global to apply the action to all record types in the search result. Values are: • `Global`
`actionType`	**Field Type** SearchResultActionType (enumeration of type string) **Description** Required. Specifies the type of action that a user can launch. Values are:

Field Name	Description
	• `FlowDefinition` • `LightningWebComponent` • `OmniScript`—Available in API version 60.0 and later.
`description`	**Field Type** string **Description** The description of the search result action configuration.
`masterLabel`	**Field Type** string **Description** Required. The name of the action that's displayed in the search page.

Declarative Metadata Sample Definition

The following is an example of a SearchResultActionConfig component.

```
<?xml version="1.0" encoding="UTF-8"?>
<SearchResultActionConfig xmlns="http://soap.sforce.com/2006/04/metadata">
    <actionReference>setup_service_experience__Create_Case</actionReference>
    <actionScope>Global</actionScope>
    <actionType>FlowDefinition</actionType>
    <description>Screen flow to create a case.</description>
    <masterLabel>Create a Case</masterLabel>
</SearchResultActionConfig>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>SearchResultActionConfig</name>
    </types>
    <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

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**.

SearchableObjDataSyncInfo
Represents information about the data synchronization for a search object, such as frequency of synchronization, status, and the date and time of the last synchronization. This object is available in API version 58.0 and later.

SearchCriteriaConfiguration
Represents the configuration details of searchable field sets such as the group of fields used as the basis for search, aggregation, sort, and result display. This object is available in API version 58.0 and later.

SearchResultActionConfig
Represents a collection of fields to set up the actions that a user can perform on results returned by criteria-based search. This object is available in API version 59.0 and later.

SearchableObjDataSyncInfo

Represents information about the data synchronization for a search object, such as frequency of synchronization, status, and the date and time of the last synchronization. This object is available in API version 58.0 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

Automotive and Criteria-Based Search and Filter must be enabled.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Filter, Group, Nillable, Sort **Description** The description of a searchable object data sync information record. Maximum length allowed is 255 characters.

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the record.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** The full name of the associated metadata object 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.
`IsDataSyncActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the data synchronization operation for the search object is active (true) or not (false). This value does not indicate the status of a Data Processing Engine (DPE) definition, but the system job that executes that DPE definition. The default value is `false`.
`LastDataSyncRunDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The last date and time at which the data synchronization job ran. This field does not indicate the date and time when the Data Processing Engine (DPE) last ran, but rather when the system job that executes the DPE definition last ran.
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Master label for SearchableObjDataSyncInfo. This internal label doesn't get translated.

Field	Details
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Metadata that defines search criteria configurations. 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.
`ScheduleFrequencyInHours`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The frequency at which the data synchronization job is run to refresh data in the searchable object.
`SearchableObject`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The object that's used for criteria-based search and filter. Possible values are: • `VehicleSearchableField`—This value is applicable for Automotive Cloud.

SearchCriteriaConfiguration

Represents the configuration details of searchable field sets such as the group of fields used as the basis for search, aggregation, sort, and result display. This object is available in API version 58.0 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

Automotive and Criteria-Based Search and Filter must be enabled.

Fields

Field	Details
`ActionList`	**Type** textarea **Properties** Nillable **Description** The list of actions that can be launched for a search result. Available in API version 59.0 and later.
`AdditionalSearchCriteria`	**Type** string **Properties** Nillable **Description** The additional configuration attributes used in criteria-based search. Available in API version 63.0 and later.
`AggrCriteriaFieldsetId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The set of fields in the searchable object that can be used as aggregation criteria. This field is a relationship field. **Relationship Name** AggrCriteriaFieldset **Relationship Type** Lookup **Refers To** FieldSet
`ConfigurationType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the type of search criteira configuration. Available in API version 63.0 and later. Possible values are: • `CLINICAL_TRAIL_SEARCH`

Field	Details
	• DEFAULT_SEARCH
Description	**Type** textarea **Properties** Filter, Group, Nillable, Sort **Description** The description of a search criteria configuration record. Maximum length allowed is 255 characters.
DeveloperName	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the record.
DistanceCriteria	**Type** textarea **Properties** Nillable **Description** A JSON string that stores the distance configuration attributes used in criteria-based search.
FilterType	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the type of filter criteria to use for criteria-based search and filter. Possible values are: • GROUPING_AND_AGGREGATION • MULTIPLE_FIELDS
FullName	**Type** string **Properties** Create, Group, Nillable **Description** The full name of the associated metadata object 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.

Field	Details
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the search criteria configuration is active (true) or not (false). The default value is `false`.
`IsSingleFieldSort`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the search results are sorted based on a single field (`true`) or not (`false`). Available in API version 63.0 and later. The default value is `false`.
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Master label for SearchCriteriaConfiguration. This internal label doesn't get translated.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Metadata that defines search criteria configurations. 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.
`ResultDisplayFormat`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the display format of search results. Possible values are: • `CARD`

Field	Details
	• LIST
ResultFieldsetId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The set of fields in the searchable object that can be used as search result columns. This field is a relationship field. **Relationship Name** ResultFieldset **Relationship Type** Lookup **Refers To** FieldSet
ResultFlexCard	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the OmniStudio FlexCard used to display search results as cards.
SearchCriteriaFieldsetId	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The set of fields in the searchable object that can be used for querying data. This field is a relationship field. **Relationship Name** SearchCriteriaFieldset **Relationship Type** Lookup **Refers To** FieldSet
SearchableObjDataSyncInfoId	**Type** reference **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description The object that stores data sync information about the searchable object, such as whether the data sync job is active or not, and when the last data sync job was run. This field is a relationship field. **Relationship Name** SearchableObjDataSyncInfo **Relationship Type** Lookup **Refers To** SearchableObjDataSyncInfo
`SearchableObject`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The object that can be used for criteria-based search and filter. Possible values are: • `VehicleSearchableField`—This value is applicable for Automotive Cloud.
`SortingCriteriaFieldsetId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The set of fields in the searchable object that can be used as sort criteria for search results. This field is a relationship field. **Relationship Name** SortingCriteriaFieldset **Relationship Type** Lookup **Refers To** FieldSet

SearchResultActionConfig

Represents a collection of fields to set up the actions that a user can perform on results returned by criteria-based search. 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, Criteria-Based Search and Filter must be enabled in your org.

Fields

Field	Details
`ActionReference`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The action that a user can launch for a search result. Specify the ID of an instance that corresponds to your action type.
`ActionScope`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Specifies the scope of the action that the user can launch. For example, select Global to apply the action to all record types in the search result. Possible values are: • `Global`
`ActionType`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Specifies the type of action that a user can launch. Possible values are: • `FlowDefinition` • `LightningWebComponent` • `OmniScript`—Available in API version 60.0 and later.

Field	Details
`Description`	**Type** textarea **Properties** Filter, Group, Nillable, Sort **Description** The description of the search result action configuration.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name for the search result action configuration.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** The full name of the associated SearchResultActionConfig 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`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language of the search result action configuration.
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label for the search result action configuration. In the UI, this field is **Name**.
`Metadata`	**Type** SearchResultActionConfig

Field	Details
	Properties Create, Nillable, Update **Description** The search result action configuration's metadata.

Business APIs

Return search results or retrieve unified object search data.

This table lists the available resources.

Resource	Description
`/connect/criteria-based-search/configurations` (GET)	Retrieve the unified object search data based on the input criteria and the search configuration defined by the administrator.
`/connect/criteria-based-search/searchable-object/results` (POST)	Returns the results for search based on the searchable object configuration and search criteria configuration defined by the admin.

Resources
Learn more about the available resources.

Request Bodies
Learn more about the available request bodies.

Response Bodies
Learn more about the available response bodies.

Resources

Learn more about the available resources.

Criteria-Based Search Filter Configurations
Retrieve the unified object search data based on the input criteria and the search configuration defined by the administrator.

Criteria-Based Search Results
Returns the results for search based on the searchable object configuration and search criteria configuration defined by the admin.

Criteria-Based Search Filter Configurations

Retrieve the unified object search data based on the input criteria and the search configuration defined by the administrator.

Resource

```
/connect/criteria-based-search/configurations
```

Resource example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/criteria-based-search/configurations
```

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/criteria-based-search/configurations?fullNames=Provider_Search
```

Available version

58.0

Requires Chatter

No

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`fullNames`	String[]	List of search criteria configuration record names.	Optional	58.0

Response body for GET

Unified Object Search Config Metadata Result

Criteria-Based Search Results

Returns the results for search based on the searchable object configuration and search criteria configuration defined by the admin.

Resource

```
/connect/criteria-based-search/searchable-object/results
```

Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/criteria-based-search/searchable-object/results
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "searchCriteriaConfigurationName": "Config_Name",
  "pageNumber": 1,
  "pageSize": 50,
  "freeTextFieldName": "Field Name",
  "globalSearchTerm": "Keyword",
  "offset": 0,
  "aggregationCriteriaFieldset": [
    "ProviderType",
    "FacilityName"
  ],
  "sortingCriteriaFieldset": [
    {
      "isSortAscending": false,
      "sortFieldName": "FacilityName"
    }
  ],
  "searchCriteria": [
    {
      "searchCriteriaFieldName": "ProviderType",
      "searchCriteriaFieldOperator": "like",
      "searchFieldCriteriaValueList": [
        "Medical Doctor"
      ],
      "searchCriteriaFieldType": "text"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
aggregationCriteriaFieldset	String[]	Fields that you select in the search criteria configuration as the basis for querying data.	Optional	58.0
freeTextFieldName	String	Name of the search criteria field used by the user for the search.	Optional	58.0
globalSearchTerm	String	The keyword that you use to perform a comprehensive search across all text-indexed columns of the specified object.	Optional	61.0
latitude	Double	User's latitude that's used to find search results within a certain distance from the user's location.	Optional	58.0

Name	Type	Description	Required or Optional	Available Version
`longitude`	Double	User's longitude that's used to find search results within a certain distance from the user's location.	Optional	58.0
`offset`	Integer	Number of records to skip before searching for records. The default value is `0`.	Optional	61.0
`pageNumber`	Integer	Number of the page you want returned. If you don't specify a value, the first page is returned by default.	Optional	58.0
`pageSize`	Integer	Number of search result records on each page.	Optional	58.0
`searchCriteria`	Unified Object Search Criteria[]	Name of the search criteria configuration.	Optional	58.0
`searchCriteriaConfigurationName`	String	Name of the search definition.	Optional	58.0
`sortingCriteriaFields`	Unified Object Search Sort By Field[]	Details of the fields that you use to sort the search results.	Required	58.0

Response body for POST

Unified Object Search Data

Request Bodies

Learn more about the available request bodies.

Unified Object Search Data Input

Input representation to perform the unified object data search.

Unified Object Search Field Criteria

Input representation to search the unified object search field criteria.

Unified Object Search Sort By Field

Input representation of the unified object sort by field.

Unified Object Search Data Input

Input representation to perform the unified object data search.

JSON example

```
{
  "searchCriteriaConfigurationName": "Config_Name",
  "pageNumber": 1,
```

```
  "pageSize": 50,
  "freeTextFieldName": "Field Name",
  "globalSearchTerm": "Keyword",
  "offset": 0,
  "aggregationCriteriaFieldset": [
    "ProviderType",
    "FacilityName"
  ],
  "sortingCriteriaFieldset": [
    {
      "isSortAscending": false,
      "sortFieldName": "FacilityName"
    }
  ],
  "searchCriteria": [
    {
      "searchCriteriaFieldName": "ProviderType",
      "searchCriteriaFieldOperator": "like",
      "searchFieldCriteriaValueList": [
        "Medical Doctor"
      ],
      "searchCriteriaFieldType": "text"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
aggregationCriteriaFieldset	String[]	Fields that you select in the search criteria configuration as the basis for querying data.	Optional	58.0
freeTextFieldName	String	Name of the search criteria field used by the user for the search.	Optional	58.0
globalSearchTerm	String	The keyword that you use to perform a comprehensive search across all text-indexed columns of the specified object.	Optional	61.0
latitude	Double	User's latitude that's used to find search results within a certain distance from the user's location.	Optional	58.0
longitude	Double	User's longitude that's used to find search results within a certain distance from the user's location.	Optional	58.0
offset	Integer	Number of records to skip before searching for records. The default value is `0`.	Optional	61.0

Name	Type	Description	Required or Optional	Available Version
`pageNumber`	Integer	Number of the page you want returned. If you don't specify a value, the first page is returned by default.	Optional	58.0
`pageSize`	Integer	Number of search result records on each page.	Optional	58.0
`searchCriteria`	Unified Object Search Criteria[]	Name of the search criteria configuration.	Optional	58.0
`searchCriteriaConfigurationName`	String	Name of the search definition.	Optional	58.0
`sortingCriteriaFieldset`	Unified Object Search Sort By Field[]	Details of the fields that you use to sort the search results.	Required	58.0

Unified Object Search Field Criteria

Input representation to search the unified object search field criteria.

Properties

Name	Type	Description	Required or Optional	Available Version
`searchCriteriaFieldName`	String	Name of the field by which the user wants to sort search results.	Required	58.0
`searchCriteriaFieldOperator`	String	Comparison type for the search values. Possible values are: • `Equals` • `GreaterThan` • `GreaterThanOrEqual` • `In` • `LessThan` • `LessThanOrEqual` • `StartsWith` • `NotEquals` • `NotIn` • `Range`	Required	58.0
`searchCriteriaFieldType`	String	Search category. Possible values are: • `Distance` • `Number` • `Text`	Required	58.0

Name	Type	Description	Required or Optional	Available Version
searchFieldCriteriaValueList	Object[]	List of field values for a specific search criteria field based on which search results are filtered.	Optional	58.0

Unified Object Search Sort By Field

Input representation of the unified object sort by field.

Properties

Name	Type	Description	Required or Optional	Available Version
`isSortAscending`	Boolean	Specifies if the search results are sorted in an ascending order (`true`) or not (`false`) for criteria fields.	Optional	58.0
`sortFieldName`	String	Name of the field by which the user wants to sort search results.	Required	58.0

Response Bodies

Learn more about the available response bodies.

Action
Output representation of the action that is returned as part of the search configuration metadata.

Field Representation
Output representation of the field that is returned as part of the search configuration metadata.

Searchable Criteria
Output representation of the filter that is returned as part of the search configuration metadata.

Timeline Error
Output representation for the error response.

Unified Object Search Config Metadata
Output representation of the unified search configuration metadata.

Unified Object Search Config Metadata Result
Output representation for the unified object search configuration metadata result.

Unified Object Search Data
Output representation of the unified object search data.

Unified Object Search Result
Output representation of the unified object search data result records.

Unified Object Search Result Field
Output representation for the unified object search result field.

Unified Object Search Result Map Data
Output representation of the list of unified object search result map data records.

Unified Object Search Result Map Data Record
Output representation of the unified object search result map data record.

Unified Object Search Result Record
Output representation of the unified object search data result record.

Unified Object Search Result Record Field Value
Output representation of the unified object search data result record value.

Unified Object Search Result Summary
Output representation of the unified object search result.

Action

Output representation of the action that is returned as part of the search configuration metadata.

Property Name	Type	Description	Filter Group and Version	Available Version
`actionReference`	String	Action that a user can launch for a search result.	Small, 59.0	59.0
`actionScope`	String	Scope of the action that the user can launch. For example, select Global to apply the action to all record types in the search result.	Small, 59.0	59.0
`actionType`	String	Type of action that a user can launch.	Small, 59.0	59.0
`displayName`	String	Name of the action that's displayed in the search page.	Small, 59.0	59.0

Field Representation

Output representation of the field that is returned as part of the search configuration metadata.

Property Name	Type	Description	Filter Group and Version	Available Version
`displayType`	String	Display type of the field.	Small, 60.0	60.0
`fieldLabel`	String	Display label of the field.	Small, 58.0	58.0
`fieldName`	String	API name of the field.	Small, 58.0	58.0

Searchable Criteria

Output representation of the filter that is returned as part of the search configuration metadata.

Property Name	Type	Description	Filter Group and Version	Available Version
options	String[]	Options for distance and other special fields.	Small, 58.0	58.0
searchFieldLabel	String	Display name of the field on the UI.	Small, 58.0	58.0
searchFieldName	String	API name of the field.	Small, 58.0	58.0
searchFieldSourceFieldName	String	API name of the source field.	Small, 58.0	58.0
searchFieldSourceObjectName	String	Primary domain for lookup type field.	Small, 58.0	58.0
searchFieldSourceObjectRecTypeId	String	Default record type ID of the source object.	Small, 58.0	58.0
searchFieldType	String	Type of the filter. Possible values are: • Text • Lookup • Picklist	Small, 58.0	58.0

Timeline Error

Output representation for the error response.

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The code of the error due to which the request failed.	Small, 58.0	58.0
message	String	The message explaining why the request failed.	Small, 58.0	58.0

Unified Object Search Config Metadata

Output representation of the unified search configuration metadata.

Property Name	Type	Description	Filter Group and Version	Available Version
actionList	Action	List of actions the end user can launch for a search result.	Small, 59.0	59.0
aggregateFields	Field Representation	Fields the end user can use to group the results.	Small, 58.0	58.0
description	String	Description of the search configuration metadata.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
`filterType`	String	Type of the filter criteria to use for criteria-based search and filter. Possible values are: • `GroupingAndAggregation` • `MultipleFields`	Small, 60.0	60.0
`objectName`	String	Name of the `SearchConfig` object on which the search is performed and data is verified.	Small, 58.0	58.0
`resultDisplayFormat`	String	Display format of search results. Possible values are: • `Card` • `List`	Small, 60.0	60.0
`resultFlexCard`	String	Name of the OmniStudio FlexCard used to display search results as cards.	Small, 60.0	60.0
`searchAndFilterFields`	Searchable Criteria	Filters that are retrieved as part of the search criteria configuration.	Small, 58.0	58.0
`searchCriteriaConfigurationActive`	Boolean	Indicates whether the search criteria configuration is active (`true`) or not (`false`).	Small, 58.0	58.0
`searchCriteriaConfigurationLabel`	String	User-friendly name for the `SearchConfig` object, which is defined when the search configuration is created.	Small, 58.0	58.0
`searchCriteriaConfigurationName`	String	Name of the search criteria configuration.	Small, 58.0	58.0
`sortFields`	Field Representation	Set of fields within `SearchConfig` that can be used to sort search results.	Small, 58.0	58.0

Unified Object Search Config Metadata Result

Output representation for the unified object search configuration metadata result.

JSON example

```
{
   "errors":[

   ],
   "searchCriteriaConfigurationList":[
      {
         "actionList":[
            {
               "actionReference":"healthcloud/createReferralActionWrapper",
```

```
            "actionScope":"Global",
            "actionType":"LightningWebComponent",
            "displayName":"Create Referral"
        }
    ],
    "aggregateFields":[
        {
            "displayType":"Checkbox",
            "fieldLabel":"Provider Gender",
            "fieldName":"ProviderGender"
        },
        {
            "displayType":"Picklist",
            "fieldLabel":"Facility Name",
            "fieldName":"FacilityName"
        },
        {
            "displayType":"Picklist",
            "fieldLabel":"Provider Type",
            "fieldName":"ProviderType"
        },
        {
            "displayType":"Picklist",
            "fieldLabel":"Specialty",
            "fieldName":"Specialty"
        },
        {
            "displayType":"Picklist",
            "fieldLabel":"Subspecialty",
            "fieldName":"SubSpecialty"
        },
        {
            "displayType":"Text",
            "fieldLabel":"Languages Spoken",
            "fieldName":"LanguagesSpoken"
        }
    ],
    "description":"",
    "filterType":"MultipleFields",
    "objectName":"CareProviderSearchableField",
    "resultDisplayFormat":"Card",
    "resultFlexCard":"HealthCloudPSProviderCardContainer",
    "searchAndFilterFields":[
        {
            "options":[

            ],
            "searchFieldLabel":"Provider Name",
            "searchFieldName":"ProviderName",
            "searchFieldSourceObjectFieldName":"ProviderName",
            "searchFieldSourceObjectName":"CareProviderSearchableField",
            "searchFieldSourceObjectRecordType":"012000000000000AAA",
            "searchFieldType":"Text"
        },
```

```
            {
               "options":[

               ],
               "searchFieldLabel":"Facility Name",
               "searchFieldName":"FacilityName",
               "searchFieldSourceObjectFieldName":"FacilityName",
               "searchFieldSourceObjectName":"CareProviderSearchableField",
               "searchFieldSourceObjectRecordType":"012000000000000AAA",
               "searchFieldType":"Text"
            },
            {
               "options":[

               ],
               "searchFieldLabel":"Provider Gender",
               "searchFieldName":"ProviderGender",
               "searchFieldSourceObjectFieldName":"ProviderGender",
               "searchFieldSourceObjectName":"CareProviderSearchableField",
               "searchFieldSourceObjectRecordType":"012000000000000AAA",
               "searchFieldType":"Text"
            },
            {
               "options":[

               ],
               "searchFieldLabel":"Provider Type",
               "searchFieldName":"ProviderType",
               "searchFieldSourceObjectFieldName":"ProviderType",
               "searchFieldSourceObjectName":"HealthcareProvider",
               "searchFieldSourceObjectRecordType":"012000000000000AAA",
               "searchFieldType":"Picklist"
            },
            {
               "options":[

               ],
               "searchFieldLabel":"Accepts new patients",
               "searchFieldName":"IsAcceptingNewPatients",
               "searchFieldSourceObjectFieldName":"IsAcceptingNewPatients",
               "searchFieldSourceObjectName":"CareProviderSearchableField",
               "searchFieldSourceObjectRecordType":"012000000000000AAA",
               "searchFieldType":"Boolean"
            },
            {
               "options":[

               ],
               "searchFieldLabel":"Specialty",
               "searchFieldName":"Specialty",
               "searchFieldSourceObjectFieldName":"Specialty",
               "searchFieldSourceObjectName":"CareProviderSearchableField",
               "searchFieldSourceObjectRecordType":"012000000000000AAA",
               "searchFieldType":"Text"
```

```
            },
            {
               "options":[
                  {
                     "5":"5 miles"
                  },
                  {
                     "10":"10 miles"
                  },
                  {
                     "50":"50 miles"
                  }
               ],
               "searchFieldLabel":"Maximum Distance Range",
               "searchFieldName":"",
               "searchFieldSourceObjectFieldName":"",
               "searchFieldSourceObjectName":"",
               "searchFieldSourceObjectRecordType":"",
               "searchFieldType":"Distance"
            }
         ],
         "searchCriteriaConfigurationIsActive":true,
         "searchCriteriaConfigurationLabel":"Provider Search",
         "searchCriteriaConfigurationName":"Provider_Search",
         "sortFields":[

         ]
      }
   ],
   "status":"SUCCESS"
}
```


Property Name	Type	Description	Filter Group and Version	Available Version
`errors`	Timeline Error	Details of the error message returned if the request failed to retrieve the search configuration metadata.	Small, 58.0	58.0
`searchCriteriaConfigurationList`	Unified Object Search Config Metadata	Search criteria configurations to retrieve the definitions.	Small, 58.0	58.0
`status`	String	Indicates whether the request succeeded (`true`) or failed (`false`).	Small, 58.0	58.0

Unified Object Search Data

Output representation of the unified object search data.

JSON example


```
{
   "data":{
      "searchResultFields":[
         {
            "fieldLabel":"Provider Name",
            "fieldName":"ProviderName",
            "fieldType":"string"
         },
         {
            "fieldLabel":"Provider Type",
            "fieldName":"ProviderType",
            "fieldType":"string"
         },
         {
            "fieldLabel":"Specialty",
            "fieldName":"Specialty",
            "fieldType":"textarea"
         }
      ],
      "searchResultRecords":[
         {
            "fieldValues":[
               {
                  "recordTextValue":"Marvin Monroe"
               },
               {
                  "recordTextValue":"Medical Doctor"
               },
               {
                  "recordTextValue":"|Mental Health|"
               },
               {
                  "recordTextValue":"0d0Z60000004CLTIA2"
               }
            ]
         },
         {
            "fieldValues":[
               {
                  "recordTextValue":"Julius Hibbert"
               },
               {
                  "recordTextValue":"Medical Doctor"
               },
               {
                  "recordTextValue":"|Primary Care|"
               },
               {
                  "recordTextValue":"0d0Z60000004CLbIAM"
               }
            ]
         },
```

```
        {
           "fieldValues":[
              {
                 "recordTextValue":"Nick Riviera"
              },
              {
                 "recordTextValue":"Medical Doctor"
              },
              {
                 "recordTextValue":"|Surgery|"
              },
              {
                 "recordTextValue":"0d0Z60000004CLYIA2"
              }
           ]
        },
        {
           "fieldValues":[
              {
                 "recordTextValue":"Robert Kelso"
              },
              {
                 "recordTextValue":"Medical Doctor"
              },
              {
                 "recordTextValue":"|Primary Care|"
              },
              {
                 "recordTextValue":"0d0Z60000004CLVIA2"
              }
           ]
        },
        {
           "fieldValues":[
              {
                 "recordTextValue":"John Dorian"
              },
              {
                 "recordTextValue":"Medical Doctor"
              },
              {
                 "recordTextValue":"|Primary Care|"
              },
              {
                 "recordTextValue":"0d0Z60000004CLWIA2"
              }
           ]
        },
        {
           "fieldValues":[
              {
                 "recordTextValue":"Percival Cox"
              },
              {
```

```
                "recordTextValue":"Medical Doctor"
            },
            {
                "recordTextValue":"|Primary Care|"
            },
            {
                "recordTextValue":"0d0Z60000004CLXIA2"
            }
        ]
    },
    {
        "fieldValues":[
            {
                "recordTextValue":"Christopher Turk"
            },
            {
                "recordTextValue":"Medical Doctor"
            },
            {
                "recordTextValue":"|Surgery|"
            },
            {
                "recordTextValue":"0d0Z60000004CLZIA2"
            }
        ]
    },
    {
        "fieldValues":[
            {
                "recordTextValue":"Elliot Reid"
            },
            {
                "recordTextValue":"Medical Doctor"
            },
            {
                "recordTextValue":"|Primary Care|"
            },
            {
                "recordTextValue":"0d0Z60000004CLaIAM"
            }
        ]
    }
  ]
},
"errors":[

],
"status":"SUCCESS",
"summary":{
  "aggregateRecordCount":{

  },
  "aggregateRecordCountByCriteria":{
    "ProviderType":{
```

```
            },
            "FacilityName":{

            }
        },
        "isMoreRecordsPresent":false
    }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
data	Unified Object Search Result	Details of the criteria-based search and filter results.	Small, 58.0	58.0
errors	Timeline Error[]	Details of the errors that were displayed.	Small, 58.0	58.0
mapData	Unified Object Search Result Map Data[]	Map details of the records whose location is displayed in search results.	Small, 61.0	61.0
offset	Integer	Number of records that are skipped before returning all records.	Small, 61.0	61.0
pageNumber	Integer	Number of the page.	Small, 58.0	58.0
pageSize	Integer	Number of search result records on each page.	Small, 58.0	58.0
resultAggregationFields	String[]	The fields that are selected in the search criteria configuration and are used to group and aggregate search results.	Small, 58.0	58.0
status	String	Indicates whether the request succeeded (SUCCESS) or failed (FAILURE).	Small, 58.0	58.0
summary	Unified Object Search Result Summary	The summary of the count of records for each search result aggregation criteria field.	Small, 58.0	58.0

Unified Object Search Result

Output representation of the unified object search data result records.

Property Name	Type	Description	Filter Group and Version	Available Version
searchResultFields	Unified Object Search Result Field[]	The fields selected in the search criteria configuration that are used for grouping and aggregating search results.	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
searchResultRecords	Unified Object Search Result Record[]	Information on the various fields and value map list.	Small, 58.0	58.0

Unified Object Search Result Field

Output representation for the unified object search result field.

Property Name	Type	Description	Filter Group and Version	Available Version
fieldLabel	String	Record field label.	Small, 58.0	58.0
fieldName	String	Record field name.	Small, 58.0	58.0
fieldType	String	Record field data type.	Small, 58.0	58.0

Unified Object Search Result Map Data

Output representation of the list of unified object search result map data records.

Property Name	Type	Description	Filter Group and Version	Available Version
mapDataRecords	Unified Object Search Result Map Data Record[]	List of the map data records.	Small, 61.0	61.0

Unified Object Search Result Map Data Record

Output representation of the unified object search result map data record.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	ID of the record whose location appears in search results.	Small, 61.0	61.0
latitude	Double	Latitude of the record that's used for marking the record's location on the map.	Small, 61.0	61.0
longitude	Double	Longitude of the record that's used for marking the record's location on the map.	Small, 61.0	61.0
mapDescription	String	Description of the map marker associated with the record.	Small, 61.0	61.0

Property Name	Type	Description	Filter Group and Version	Available Version
`mapTitle`	String	Title of the map marker associated with the record.	Small, 61.0	61.0

Unified Object Search Result Record

Output representation of the unified object search data result record.

Property Name	Type	Description	Filter Group and Version	Available Version
`fieldValues`	Unified Object Search Result Record Field Value	List of search result fields that the record is returned for.	Small, 58.0	58.0

Unified Object Search Result Record Field Value

Output representation of the unified object search data result record value.

Property Name	Type	Description	Filter Group and Version	Available Version
`id`	String	Record ID.	Small, 58.0	58.0
`recordFieldName`	String	Record field name.	Small, 58.0	58.0
`recordNumberValue`	Double	Record number value.	Small, 58.0	58.0
`recordTextValue`	String	Record text value.	Small, 58.0	58.0

Unified Object Search Result Summary

Output representation of the unified object search result.

Property Name	Type	Description	Filter Group and Version	Available Version
`aggregateRecordCount`	Map<String, Integer>	Search summary map group that needs to be counted.	Small, 58.0	58.0
`aggregateRecordCountByCriteria`	Map<String, Integer>	Search summary map grouped by criteria that needs to be counted.	Small, 60.0	60.0
`isMoreGroupsPresent`	Boolean	Indicates whether there are more search groups present (`true`) or not (`false`).	Small, 58.0	58.0
`isMoreRecordsPresent`	Boolean	Indicates whether there are more search records present (`true`) or not (`false`).	Small, 58.0	58.0

CHAPTER 14 Decision Explainer

In this chapter ...

- Decision Explainer APIs
- Decision Explainer Tooling API Objects

Give caseworkers insights into eligibility determinations and calculation details, and share the reasoning behind application decisions with constituents.

Use Decision Explainer to understand the expression sets in Business Rules Engine calculations for individual and business application fees, unemployment benefits, and education loan eligibility checks .

EDITIONS

Available in: Lightning Experience

Available in: Enterprise, Unlimited, and Performance Editions

Decision Explainer APIs

Use the Decision Explainer Business APIs to give users a seamless API experience for applications to audit their past events.

Decision Explainer is an audit-like service that can be used by applications to store their application data to explain past events. The stored data can be retrieved later for reporting through custom-built user interfaces. The service is exposed through Connect REST APIs.

Available resources are:

Resource	Description
`/connect/decision-explainer/action-logs`	Retrieve a paginated list of explainability action logs. Create explainability action logs.

REST Reference
You can access Decision Explainer APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

REST Reference

You can access Decision Explainer 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 Decision Explainer API resources.

Request Bodies
Here's a list of Decision Explainer API request bodies.

Response Bodies
Here's a list of Decision Explainer API response bodies.

Resources

Here's a list of Decision Explainer API resources.

Action Logs (GET, POST)
Retrieve a paginated list of Explainability action logs. Create an Explainability action log.

Action Logs (GET, POST)

Retrieve a paginated list of Explainability action logs. Create an Explainability action log.

Resource

```
/connect/decision-explainer/action-logs
```

Example for GET

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/
decision-explainer/action-logs?actionContextCode=001x0000005DmI3AAK
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/
decision-explainer/action-logs
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET, POST

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`actionContextCode`	String	The record ID within the context of the associated application's action that's used to retrieve action logs.	Required	54.0
`applicationSubType`	String	The subtype of the associated application for which the explainability log is generated. This matches one of the valid values in the ExplainabilityActionDef `ApplicationSubtype` field.	Optional	54.0
`applicationType`	String	The name of the application for which the explainability service is run. This matches one of the valid values in the ExplainabilityActionDef `ApplicationType` field.	Optional	54.0
`createdAfter`	String	A valid date time after which the explainability action log records are returned.	Optional	54.0
`createdBefore`	String	A valid date time before which the explainability action log records are returned.	Optional	54.0
`pageSize`	Integer	The number of explainability action log records to return. The value can range from 200 to 500.	Optional	54.0
`processType`	String	The process type of the associated application for which the explainability action log is generated. This matches one of the valid values in the	Optional	54.0

Parameter Name	Type	Description	Required or Optional	Available Version
		ExplainabilityActionDef `ProcessType` field.		
`queryMore`	String	A string returned from the previous request, which you must pass to the next request to get the next page.	Optional	54.0

Response body for GET

Explainability Action Logs

Request body for POST

Root XML tag

`ExplainabilityActionLog`

JSON example


```
{
"specificationName" : "EAD1",
"name" : "testEAL1",
"actionLog" :
"{\"input\":{\"input\":{\"input\":2}},\"ruledefinition\":{\"calculationProcedureId\":\"0k0xx00000000JNAAY\",
\"variables\":{\"details\":[{\"apiName\":\"total\",\"isEditable\":true,\"defaultValue\":null,\"displayName\":null,\"dataType\"
:\"Number\",\"precision\":2,\"calculationMatrixName\":null,\"name\":\"total\",\"isUserDefined\":true,\"uiDisplayOrder\":null,
\"id\":\"0kIxx000000018zEAA\"},{\"apiName\":\"input\",\"isEditable\":true,\"defaultValue\":\"10\",\"displayName\":null,\"dataType\"
:\"Number\",\"precision\":2,\"calculationMatrixName\":null,\"name\":\"input\",\"isUserDefined\":true,\"uiDisplayOrder\":null,\"id\"
:\"0kIxx00000001AbEAI\"}]},\"code\":null,\"endDate\":null,\"description\":null,\"message\":null,\"enabled\":true,\"versionNumber\":2,
\"versionId\":\"0k1xx00000000knAAA\",\"root\":{\"steps\":[\"0mqxx00000001TxAAI\"]},\"name\":\"es1
 V1 CLONE\",\"rank\":2,\"step\":
{\"details\":{\"0mqxx00000001TxAAI\":{\"inputVariablesFormatText\":\"[{\\\"name\\\":\\\"input\\\",\\\"dataType\\\":\\\"Number\\\",
\\\"alias\\\":\\\"input\\\"}]\",\"stepType\":\"Calculation\",\"outputVariablesFormatText\":\"{\\\"name\\\":\\\"total\\\",\\\"dataType\\\":
\\\"Number\\\",\\\"alias\\\":\\\"total\\\"}\",\"conditionsUiFormattedText\":\"{\\\"bypass\\\":{},\\\"stepNumber\\\":3}\",
\"formulaUiFormattedText\":null,\"description\":null,\"outputVariablesMappingText\":\"{\\\"total\\\":\\\"total\\\"}\",
\"conditionsExpressionText\":null,\"calculationMatrixId\":null,\"isResultIncluded\":true,\"formulaExpressionText\":\"10
 * input\",\"stage\":
\"Calculation\",\"name\":\"Calculation\",\"childStepIds\":[],\"referenceCalculationProcedureId\":null,\"id\":\"0mqxx00000001TxAAI\",
\"returnMessageValueSet\":\"{\\\"true\\\":\\\"\\\",\\\"false\\\":\\\"\\\"}\"}}},\"constants\":{\"details\":[]},\"startDate\":1637684784000,
\"isSuccess\":null},\"runtime\":{\"output\":[{\"aggregationResults\":{},\"calculationResults\":[{\"total\":20,\"ID\":\"input\"}]}],\"simulate\"
:{\"0mqxx00000001TxAAI\":{\"stepInputs\":{\"input\":2},\"stepResults\":{\"total\":20}}}}}",
"actionLogDate" : "2021-09-15T03:18:30.081Z",
"actionContextCode" : "0f0xx0000000001AAA"
}
```


Properties

Name	Type	Description	Required or Optional	Available Version
`actionContextCode`	String	The valid Salesforce record ID that's used to retrieve the explainability action logs.	Required	54.0

Name	Type	Description	Required or Optional	Available Version
`actionLog`	String	The contents of the explainability action log.	Required	54.0
`action LogDate`	String	The date and time when the explainability action log was generated by the application's action.	Required	54.0
`actionLog OwnerId`	String	The ID of the user who owns the action log.	No	54.0
`additional Filter`	String	The string that's used as an additional filter criteria to fetch the explainability action logs.	Optional	57.0
`name`	String	A name to identify the explainability action log record.	No	54.0
`primary Filter`	String	The string that's used as the primary filter criteria to fetch the explainability action logs.	Optional	57.0
`secondary Filter`	String	The string that's used as the secondary filter criteria to fetch the explainability action logs.	Optional	57.0
`specification Name`	String	A unique name that identifies an active explainability action log record.	Required	54.0

Response body for POST

Explainability Action Log Create

Request Bodies

Here's a list of Decision Explainer API request bodies.

Explainability Action Log Input

Input representation of Explainability action logs.

Explainability Action Log Input

Input representation of Explainability action logs.

Root XML tag

`ExplainabilityActionLog`

JSON example

```
{
"specificationName" : "EAD1",
"name" : "testEAL1",
```

```
"actionLog" :
"{\"input\":{\"input\":{\"input\":2}},\"ruledefinition\":{\"calculationProcedureId\":\"0k0xx00000000JNAAY\",
\"variables\":{\"details\":[{\"apiName\":\"total\",\"isEditable\":true,\"defaultValue\":null,\"displayName\":null,\"dataType\"
:\"Number\",\"precision\":2,\"calculationMatrixName\":null,\"name\":\"total\",\"isUserDefined\":true,\"uiDisplayOrder\":null,
\"id\":\"0kJxx000000018zEAA\"},{\"apiName\":\"input\",\"isEditable\":true,\"defaultValue\":\"10\",\"displayName\":null,\"dataType\"
:\"Number\",\"precision\":2,\"calculationMatrixName\":null,\"name\":\"input\",\"isUserDefined\":true,\"uiDisplayOrder\":null,\"id\"
:\"0kJxx00000001AbEAI\"}]},\"code\":null,\"endDate\":null,\"description\":null,\"message\":null,\"enabled\":true,\"versionNumber\":2,
\"versionId\":\"0k1xx00000000knAAA\",\"root\":{\"steps\":[\"0mqxx00000001TxAAI\"]},\"name\":\"es1
 V1 CLONE\",\"rank\":2,\"step\":
{\"details\":{\"0mqxx00000001TxAAI\":{\"inputVariablesFormatText\":\"[{\\\"name\\\":\\\"input\\\",\\\"dataType\\\":\\\"Number\\\",
\\\"alias\\\":\\\"input\\\"}]\",\"stepType\":\"Calculation\",\"outputVariablesFormatText\":\"{\\\"name\\\":\\\"total\\\",\\\"dataType\\\":
\\\"Number\\\",\\\"alias\\\":\\\"total\\\"}\",\"conditionsUiFormattedText\":\"{\\\"bypass\\\":{},\\\"stepNumber\\\":3}\",
\"formulaUiFormattedText\":null,\"description\":null,\"outputVariablesMappingText\":\"{\\\"total\\\":\\\"total\\\"}\",
\"conditionsExpressionText\":null,\"calculationMatrixId\":null,\"isResultIncluded\":true,\"formulaExpressionText\":\"10
 * input\",\"stage\":
\"Calculation\",\"name\":\"Calculation\",\"childStepIds\":[],\"referenceCalculationProcedureId\":null,\"id\":\"0mqxx00000001TxAAI\",
\"returnMessageValueSet\":\"{\\\"true\\\":\\\"\\\",\\\"false\\\":\\\"\\\"}\"}}},\"constants\":{\"details\":[]},\"startDate\":1637684784000,
\"isSuccess\":null},\"runtime\":{\"output\":[{\"aggregationResults\":{},\"calculationResults\":[{\"total\":20,\"ID\":\"input\"}]}],\"simulate\"
:{\"0mqxx00000001TxAAI\":{\"stepInputs\":{\"input\":2},\"stepResults\":{\"total\":20}}}}}",
"actionLogDate" : "2021-09-15T03:18:30.081Z",
"actionContextCode" : "0f0xx0000000001AAA"
}
```


Properties

Name	Type	Description	Required or Optional	Available Version
actionContextCode	String	The valid Salesforce record ID that's used to retrieve the explainability action logs.	Required	54.0
actionLog	String	The contents of the explainability action log.	Required	54.0
actionLogDate	String	The date and time when the explainability action log was generated by the application's action.	Required	54.0
actionLogOwnerId	String	The ID of the user who owns the action log.	No	54.0
additionalFilter	String	The string that's used as an additional filter criteria to fetch the explainability action logs.	Optional	57.0
name	String	A name to identify the explainability action log record.	No	54.0
primaryFilter	String	The string that's used as the primary filter criteria to fetch the explainability action logs.	Optional	57.0
secondaryFilter	String	The string that's used as the secondary filter criteria to fetch the explainability action logs.	Optional	57.0

Name	Type	Description	Required or Optional	Available Version
`specificationName`	String	A unique name that identifies an active explainability action log record.	Required	54.0

Response Bodies

Here's a list of Decision Explainer API response bodies.

Explainability Action Logs
Output representation of the list of Explainability action logs.

Explainability Action Log Create
Output representation of the create Explainability action log request.

Explainability Action Log Detail
Output representation of the Explainability action log details.

Explainability Action Logs

Output representation of the list of Explainability action logs.

JSON example

```
{
   "actionLogs" : [ {
      "actionContextCode" : "001x0000005DmI3AAK",
      "actionLog" : "{This is a sample action log data.}",
      "applicationLogDate" : "Mon Dec 06 10:29:35 GMT 2021",
      "applicationSubtype" : "AST1",
      "applicationType" : "0",
      "name" : "EAD1",
      "processType" : "BPT1"
   }, {
      "actionContextCode" : "001x0000005DmI3AAK",
      "actionLog" : "{This is a sample action log data.}",
      "applicationLogDate" : "Mon Dec 06 15:21:09 GMT 2021",
      "applicationSubtype" : "AST1",
      "applicationType" : "0",
      "name" : "EAD1",
      "processType" : "BPT1"
   } ],
   "queryMore" : ""
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`actionLogs`	Explainability Action Log Detail[]	Represents the list of explainability action logs.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
queryMore	String	A string that can be passed to the next call to fetch the next batch of explainability action log records.	Small, 54.0	54.0

Explainability Action Log Create

Output representation of the create Explainability action log request.

JSON example

```
{
   "sequenceNumber" : 1,
   "uniqueIdentifier" : "de3b62ae-410b-419a-b75e-1d2d5cb24b88"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
sequenceNumber	Integer	The sequence number of the explainability action log.	Small, 54.0	54.0
uniqueIdentifier	String	The unique ID of the explainability action log created after a successful create request.	Small, 54.0	54.0

Explainability Action Log Detail

Output representation of the Explainability action log details.

Property Name	Type	Description	Filter Group and Version	Available Version
actionContextCode	String	The record ID within the context of the associated application's action that's used to retrieve the action log.	Small, 54.0	54.0
actionLog	String	The contents of the explainability action log.	Small, 54.0	54.0
additionalFilter	String	The string that's used as an additional filter criteria to fetch the explainability action logs.	Small, 57.0	57.0
applicationLogDate	String	The date and time when the explainability action log was generated by the application's action.	Small, 54.0	54.0
applicationSubtype	String	The subtype of the associated application for which the explainability log is generated. This matches one of the valid values in the ExplainabilityActionDef `ApplicationSubType` field.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
applicationType	String	The name of the application for which the explainability service is run. This matches one of the valid values in the ExplainabilityActionDef ApplicationType field.	Small, 54.0	54.0
explainabilitySpecName	String	The name that identifies the explainability specification.	Small, 57.0	57.0
name	String	A name to identify the explainability action log record.	Small, 54.0	54.0
primaryFilter	String	The string that's used as the primary filter criteria to fetch the explainability action logs.	Small, 57.0	57.0
processType	String	The process type of the associated application for which the explainability action log is generated. This matches one of the valid values in the ExplainabilityActionDef ProcessType field.	Small, 54.0	54.0
secondaryFilter	String	The string that's used as the secondary filter criteria to fetch the explainability action logs.	Small, 57.0	57.0

Decision Explainer Tooling API Objects

Decision Explainer objects store and locate the metadata associated with every business rule.

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**.

ApplicationSubtypeDefinition

Represents a subtype of an application within an application domain. Available in API version 54.0 and later.

BusinessProcessTypeDef

Represents a type of business process within an application domain. Available in API version 54.0 and later.

ExplainabilityActionDef

Represents the explainability definition of the explainability action log that's generated by the associated application's action. Available in API version 54.0 and later.

ExplainabilityActionVersion

Represents the explainability action version of the explainability action log that's generated by the associated application's action. Available in API version 54.0 and later.

ApplicationSubtypeDefinition

Represents a subtype of an application within an application domain. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`ApplicationUsageType`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the application's domain that defines the application's subtype. Possible values are: • `Explainability Service` The default value is `ExplainabilityService`.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the application subtype definition record.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique name of the application subtype definition.
`Language`	**Type** string

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the application subtype definition.
`ManageableState`	**Type** string **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The UI label of the application subtype definition.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org 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.

BusinessProcessTypeDef

Represents a type of business process within an application domain. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`ApplicationUsageType`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the application's domain that defines the business process type definition. Possible values are: • `Explainability Service` The default value is `ExplainabilityService`.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the business process type definition.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique name of the business process type definition.
`Language`	**Type** string

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the business process type definition.
`ManageableState`	**Type** string **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The UI label of the business process type definition.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org 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.

ExplainabilityActionDef

Represents the explainability definition of the explainability action log that's generated by the associated application's action. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`ActionLogSchemaType`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the action log schema type of the application. Possible values are: • `ExpressionSet` • `Other` The default value is `Other`.
`ApplicationSubtypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the subtype of the associated application for which the explainability log is generated. This is a relationship field. **Relationship Name** ApplicationSubtype **Relationship Type** Lookup

Field	Details
	Refers To ApplicationSubtypeDefinition
`ApplicationType`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of the application for which the explainability log is generated. Possible values are: • `PublicSector` Note: When Business Rules Engine is enabled for a Salesforce instance, the default value is '`PublicSector`'. Other usage types may be available to you depending on your industry solution and permission sets.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the explainability action definition record.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique name of the explainability action definition record.
`IsInternal`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the explainability action definition record is created internally by the Salesforce platform (`true`) or not (`false`). The default value is `false`.
`Language`	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the explainability action definition.
`ManageableState`	**Type** string **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The UI label of the explainability action definition.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org 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.
`ProcessTypeId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The process type of the explainability action definition. This is a relationship field. **Relationship Name** ProcessType **Relationship Type** Lookup **Refers To** BusinessProcessTypeDef

ExplainabilityActionVersion

Represents the explainability action version of the explainability action log that's generated by the associated application's action. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`ActionLogMessageTemplate`	**Type** string **Properties** Create, Nillable, Update **Description** The custom message template that is registered by the application.
`ActionSpecification`	**Type** string

Field	Details
	Properties Create, Nillable, Update **Description** The explainability specification of the application's action log that's generated at runtime and stored as a JSON file.
`DefinitionVersion`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The version of the explainability action definition.
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the explainability action version record.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique name of the explainability action version record.
`ExplainabilityActionDefId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The explainability action definition of which this record is one of the versions. This is a relationship field. **Relationship Name** ExplainabilityActionDef **Relationship Type** Lookup **Refers To** ExplainabilityActionDef

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Nillable, Sort, Update **Description** Indicates whether the explainability action version is active and can be used as a specification in the application's action logs (`true`) or not (`false`). The default value is `false`.
`Language`	**Type** string **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the explainability action version.
`ManageableState`	**Type** string **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, NIllable, Sort, Update **Description** The UI label of the explainability action version.

Field	Details
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org 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.

CHAPTER 15 Discovery Framework

In this chapter ...

- Discovery Framework Standard Objects
- Discovery Framework Metadata API Types
- Discovery Framework Invocable Actions
- Discovery Framework Tooling API Objects
- Discovery Framework Connect APIs
- DiscoveryFramework_Prefill Integration Procedure

The Discovery Framework data model helps manage every aspect of questionnaire-driven information collection use cases. By using this data model, your users can collect and validate their customers' information in a compliant manner. For example, financial needs analysis, digital onboarding, and more.

EDITIONS

Available in: Discovery Framework is available in Lightning Experience and included in Financial Services Cloud, Health Cloud, Public Sector Solutions, and Consumer Goods Cloud.

Discovery Framework Standard Objects

This section lists the standard objects associated with Discovery Framework with their standard fields. Use the standard objects to create assessment questions and forms.

EDITIONS

Available in: Discovery Framework is available in Lightning Experience and included in Financial Services Cloud, Health Cloud, Public Sector Solutions, and Consumer Goods Cloud.

Assessment
Stores the header data for an assessment. This object is available in API version 55.0 and later.

AssessmentDefinition
Represents the definition of an assessment including details such as the last revised date and purpose. This object is available in API version 63.0 and later.

AssessmentQuestion
Stores the questions required for an assessment. This object is available in API version 55.0 and later.

AssessmentQuestionAssignment
Represents a junction between an assessment question set and an assessment question. This object is available in API version 55.0 and later.

AssessmentQuestionResponse
Stores the responses submitted to an assessment. This object is available in API version 55.0 and later.

AssessmentQuestionSet
Container object for assessment questions. This object is available in API version 55.0 and later.

AssessmentQuestionVersion
Stores the question versions for the assessment questions. This object is available in API version 55.0 and later.

AssessmentQuestionVerChoice
Represents a choice a user can select for an assessment question version. This object is available in API version 63.0 and later.

AssessmentReason
Represents the reasons for an assessment such as the associated coverage information. This object is available in API version 63.0 and later.

AssessmentSavedSession
Represents a session of an assessment that's saved to resume for later. This object is available in API version 62.0 and later.

AssessmentSignature
Stores the respondent's signature during an assessment. This object is available in API version 57.0 and later.

AssessmentStagedData
Represents the responses to assessment questions when a user captures and submits information with the Discovery Framework Data Capture Flow on a mobile device. The information is used to create assessment and related records. This object is available in API version 63.0 and later.

DocumentDecisionRequirement
Represents the decision criteria that will be used to determine applicable documents. This object is available in API version 59.0 and later.

ExternalAssessmentDefinition
Stores information about external assessments. This object is available in API version 60.0 and later.

OmniProcessAsmtQuestionVer

Represents a junction between an OmniScript process and an assessment question version. This object is available in API version 55.0 and later.

SuggestedAssessmentDef

Stores information about suggested assessments. This object is available in API version 60.0 and later.

SuggestedAssessmentReason

Stores the reasons for a suggested assessment. This object is available in API version 60.0 and later.

Assessment

Stores the header data for an assessment. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the account for which the assessment was taken. This is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`ApplicantId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The applicant for whom the assessment was carried out. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud. This field is a relationship field.

Field	Details
`AssessmentRating`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The overall rating for the assessment. Possible values are: • `High` • `Low` • `Medium`
AssessmentStagedDataId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Assessment Staged Data that's associated with this assessment. This field is a relationship field. **Relationship Name** AssessmentStagedData **Refers To** AssessmentStagedData
`AssessmentStatus`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. The status of the assessment. Possible values are: • `Canceled` • `Completed` • `In Progress`
`AssessorId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person who carried out the assessment and recorded the responses.

Field	Details
	This field is a polymorphic relationship field. **Relationship Name** Assessor **Refers To** Account, Contact, HealthcareProvider, User
`CaseId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the case associated with the assessment. This is a relationship field. **Relationship Name** Case **Relationship Type** Lookup **Refers To** Case
`CompletedDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the assessment was completed.
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the contact associated with the assessment. This is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact

Field	Details
EffectiveDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp from when the assessment is effective.
ExpirationDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The timestamp from when the assessment lapses.
ExternalAssessmentDefId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The associated external assessment definition. This field is a relationship field. **Relationship Name** ExternalAssessmentDef **Relationship Type** Lookup **Refers To** ExternalAssessmentDefinition
Identifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of a completed or partially completed assessment in the source system.
IsSavedForLater	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort

Field	Details
	Description Indicates whether the assessment is saved as a draft (true) or not (false). The default value is false. This field is available in API version 60.0 and later.
`IsSuggestedAssessment`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the assessment is a suggested assessment (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the assessment.
`OmniProcessId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The OmniScript associated with the assessment record. This field is available in API version 56.0 and later.

Field	Details
	This field is a relationship field. **Relationship Name** OmniProcess **Relationship Type** Lookup **Refers To** OmniProcess
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who created the relationship record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the related assessment, if any. This is a relationship field. **Relationship Name** Parent **Relationship Type** Lookup **Refers To** Assessment
`PartyProfileId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Represents information about the profile of a party, such as a contact, account, or lead. This field is available only if you've enabled the Know Your Customer setting in your Salesforce org. **Relationship Name** PartyProfile **Relationship Type** Lookup **Refers To** PartyProfile
`ResponseContextId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The record in which context the response was taken. This field is available in API version 56.0 and later where Public Sector Solutions is enabled. This field is a polymorphic relationship field. **Relationship Name** ResponseContext **Relationship Type** Lookup **Refers To** • ApplicationFormEvaluation - Available in API version 62.0 and later • BusinessLicenseApplication • CarePlan • IndividualApplication • PublicComplaint • VettingEvaluation - Available in API version 62.0 and later • Visit
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of assessment. This field is available only if you have enabled Integrated Onboarding for Financial Services Cloud.

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.

AssessmentChangeEvent
Change events are available for the object.

AssessmentFeed
Feed tracking is available for the object.

AssessmentHistory
History is available for tracked fields of the object.

AssessmentShare
Sharing is available for the object.

AssessmentDefinition

Represents the definition of an assessment including details such as the last revised date and purpose. 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()`

Fields

Field	Details
`ApprovalDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the assessment was approved by the publisher.
`DisplayType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the display format for questions in the assessment for the end-user.
`EffectiveFromDate`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The date when the assessment takes effect.
EffectiveToDate	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date until the assessment is in effect.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last referenced.
LastRevisedDateTime	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the assessment was last revised.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last viewed.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The user who owns the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Refers To** Group, User
`PerformerType`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the type of performer that can record responses to the assessment.
`PublisherId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The organization or individual that published the assessment. This field is a polymorphic relationship field. **Relationship Name** Publisher **Refers To** Account, Contact, User
`Purpose`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The purpose of the assessment.

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.

AssessmentDefinitionChangeEvent

Change events are available for the object.

AssessmentDefinitionHistory
History is available for tracked fields of the object.

AssessmentDefinitionOwnerSharingRule
Sharing rules are available for the object.

AssessmentDefinitionShare
Sharing is available for the object.

AssessmentQuestion

Stores the questions required for an assessment. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`ActiveVersionId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the active version of the assessment question. This is a relationship field. **Relationship Name** ActiveVersion **Relationship Type** Lookup **Refers To** AssessmentQuestionVersion
`DataType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Required. The data type of the assessment question. Possible values are: • `Checkbox` • `Currency`

Field	Details
	• `Date` • `DateTime` • `Decimal` • `Disclosure` • `EditBlock`—Edit Block • `Email` • `File` • `Formula` • `Integer` • `Multiselect`—Multi-select • `Radio` • `RadioGroup`—Radio Group • `Select` • `Telephone` • `Text` • `TextArea`—Text Area • `TextBlock`—Text Block • `Time` • `URL`
`Description`	**Type** textarea **Properties** Filter, Nillable, Sort **Description** The description for the assessment question. This text is not rendered on the assessment.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Required. 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.
`DisplayTextCategory`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the category of the display text when the data type is Text Block. Possible values are: • `Instruction` • `Legal` • `Security`
`FormulaResponseDataType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the data type of the question response calculated by a formula. Possible values are: • `Boolean` • `Currency` • `Date` • `Decimal` • `Integer` • `Text`
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who created the relationship record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`QuestionCategory`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Required. Stores the question category. Possible values are: • `Demographic` • `Financial`
`QuestionText`	**Type** textarea **Properties** Filter, Nillable, Sort **Description** Required. The label for the assessment question that appears on the assessment.
`RelatedQuestionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description Identifies the ID of the related question. Used to define a question hierarchy. This is a relationship field. **Relationship Name** RelatedQuestion **Relationship Type** Lookup **Refers To** AssessmentQuestion
`ShouldExcludeFromMetadata`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort **Description** Indicates whether the assessment question record should be excluded from metadata (true) or not (false). The default value is `false`.
`ShouldHideInDesigner`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort **Description** Indicates whether the assesment question record should be hidden in OmniScript designer (true) or not (false). The default value is `false`.
`SourceSystemName`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the source system name from where the content of the assessment question was retrieved. Possible values are: • `MCG`

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.

AssessmentQuestionChangeEvent
Change events are available for the object.

AssessmentQuestionFeed
Feed tracking is available for the object.

AssessmentQuestionHistory
History is available for tracked fields of the object.

AssessmentQuestionShare
Sharing is available for the object.

AssessmentQuestionAssignment

Represents a junction between an assessment question set and an assessment question. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`AssessmentQuestionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The ID of the assessment question associated with this record. This is a relationship field. **Relationship Name** AssessmentQuestion **Relationship Type** Lookup **Refers To** AssessmentQuestion
`AssessmentQuestionSetId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** Required. The ID of the assessment question set associated with this record. This is a relationship field. **Relationship Name** AssessmentQuestionSet **Relationship Type** Lookup **Refers To** AssessmentQuestionSet
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Required. The name of the record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who created the relationship record. This is a polymorphic relationship field.

Field	Details
	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.

AssessmentQuestionAssignmentChangeEvent
Change events are available for the object.

AssessmentQuestionAssignmentFeed
Feed tracking is available for the object.

AssessmentQuestionAssignmentHistory
History is available for tracked fields of the object.

AssessmentQuestionAssignmentShare
Sharing is available for the object.

AssessmentQuestionResponse

Stores the responses submitted to an assessment. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`AssessmentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. The ID of the assessment associated with this record. This is a relationship field.

Field	Details
	Relationship Name Assessment **Relationship Type** Lookup **Refers To** Assessment
`AssessmentQuestionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The ID of the assessment question associated with this record. This is a relationship field. **Relationship Name** AssessmentQuestion **Relationship Type** Lookup **Refers To** AssessmentQuestionVersion
`ChoiceValue`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The response value when the question's data type is choice.
`CurrencyValue`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The response value when the question's data type is currency.
`DateTimeValue`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The response value when the question's data type is date time.

Field	Details
DateValue	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The response value when the question's data type is date.
DecimalResponseValue	**Type** double **Properties** Create, Filter, idLookup, Nillable, Sort, Update **Description** The response value when the question's data type is decimal.
ExtlAssessmentQuestionText	**Type** textarea **Properties** Create, Nillable, Update **Description** Stores the external assessment question text.
ExtlResponseValueIdentifier	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier of a response to a question in an external assessment.
IntegerResponseValue	**Type** int **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The response value when the associated assessment question's data type is integer.
IsTrueOrFalseValue	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The response value when the question's data type is boolean.

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`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of this record.
`OriginType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the origin of the assessment question response. Possible values are: • `Auto` • `Manual` • `Override`
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who created the relationship record.

Field	Details
	This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ParentAsmtQuestionVersionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the related assessment question version associated with the assessment question response. This is a relationship field. **Relationship Name** ParentAsmtQuestionVersion **Relationship Type** Lookup **Refers To** AssessmentQuestionVersion
`RespondentTimezone`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The auto-generated timezone of the respondent submitting the assessment response.
`ResponseText`	**Type** textarea **Properties** Create, Nillable, Update **Description** The response value when the question's data type is text.
`ResponseType`	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description The data type of the response value submitted.
`ResponseValue`	**Type** textarea **Properties** Nillable **Description** The response value to the assessment question.
`ResponseValueScore`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The score of the assessment question response value.
`ReviewerId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person who reviewed and edited the response. This field is a polymorphic relationship field. **Relationship Name** Reviewer **Refers To** Account, Contact, HealthcareProvider, User
`ReviewerRoleId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The role of the person who reviewed and edited the response. This field is a polymorphic relationship field. **Relationship Name** ReviewerRole **Refers To** CodeSet, CodeSetBundle

Field	Details
`TimeValue`	**Type** time **Properties** Create, Filter, idLookup, Nillable, Sort, Update **Description** The response value when the question's data type is time.

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.

AssessmentQuestionResponseChangeEvent
Change events are available for the object.

AssessmentQuestionResponseFeed
Feed tracking is available for the object.

AssessmentQuestionResponseHistory
History is available for tracked fields of the object.

AssessmentQuestionResponseShare
Sharing is available for the object.

AssessmentQuestionSet

Container object for assessment questions. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Required. 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.

Field	Details
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
Name	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The question set name.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who created the relationship record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

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.

AssessmentQuestionSetChangeEvent
Change events are available for the object.

AssessmentQuestionSetFeed
Feed tracking is available for the object.

AssessmentQuestionSetHistory
History is available for tracked fields of the object.

AssessmentQuestionSetShare
Sharing is available for the object.

AssessmentQuestionVersion

Stores the question versions for the assessment questions. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`ActivationDateTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the assessment question version was set to active.
`AdditionalInformation`	**Type** textarea **Properties** Create, Nillable, Update **Description** The additional details for an UI element, such as the disclosure text.
`AssessmentQuestionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Required. The ID of the assessment question associated with this record. This is a relationship field.

Field	Details
	Relationship Name AssessmentQuestion **Relationship Type** Lookup **Refers To** AssessmentQuestion
`AssessmentQuestionSourceDocId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the assessment question source document that's associated with the assessment question version. This field is a relationship field. **Relationship Name** AssessmentQuestionSourceDoc **Relationship Type** Lookup **Refers To** AssessmentQuestionSourceDoc This field is available in API version 61.0 and later for users with the Generative AI Assessment Questions user license.
`DataType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The data type of the assessment question associated with this record. Possible values are: • `Checkbox` • `Currency` • `Date` • `DateTime` • `Decimal` • `Disclosure` • `EditBlock`—Edit Block • `Email` • `File`

Field	Details
	• `Formula` • `Integer` • `Multiselect`—Multi-select • `Radio` • `RadioGroup`—Radio Group • `Select` • `Telephone` • `Text` • `TextArea`—Text Area • `TextBlock`—Text Block • `Time` • `URL`
`DeactivationDateTime`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the assessment question version was set to inactive.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description for the assessment question. This text is not rendered on the assessment.
`DisplayTextCategory`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Specifies the category of the display text when the data type is Text Block. Possible values are: • `Instruction` • `Legal` • `Security`
`HelpText`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The text that's added as an infobubble in the UI element related to the assessment question.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the current version of the assessment question is set to active (`true`) or not (`false`). The default value is `false`.
`IsOptionSourceResponseValue`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the response value source for an assessment question is configured as custom or SObject in the OmniStudio designer (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the assessment question version record.
`QuestionCreationType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies how the assessment question is created from the assessment question source document. Possible values are: • `GenAI` This field is available in API version 61.0 and later for users with the Generative AI Assessment Questions user license.
`QuestionText`	**Type** textarea **Properties** Create, Filter, Sort, Update **Description** Required. The assessment question text. Holds the label for the assessment question that appears on the assessment.
`ResponseValues`	**Type** textarea **Properties** Create, Nillable, Update **Description** Specifies the values to be defined in the picklist, multiselect picklist, or radio buttons.
`Status`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The status of the assessment question version.
`VersionNumber`	**Type** int

Field	Details
	Properties Filter, Group, Nillable, Sort **Description** The assessment question version number.

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.

AssessmentQuestionVersionChangeEvent
Change events are available for the object.

AssessmentQuestionVersionFeed
Feed tracking is available for the object.

AssessmentQuestionVersionHistory
History is available for tracked fields of the object.

AssessmentQuestionVersionOwnerSharingRule
Sharing rules are available for the object.

AssessmentQuestionVersionShare
Sharing is available for the object.

AssessmentQuestionVerChoice

Represents a choice a user can select for an assessment question version. 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()`

Fields

Field	Details
`AssessmentQuestionVersionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The Assessment Question Version associated with the assessment question version choice. This field is a relationship field.

Field	Details
	Relationship Name AssessmentQuestionVersion **Relationship Type** Master-detail **Refers To** AssessmentQuestionVersion (the master object)
`DisplayOrder`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The order in which the question choices is displayed for an assessment question version.
`Icon`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the icon presented as a question choice when the assessment question is of the Icon type.
`Key`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** A unique code or identifier for a question choice that's mapped to an assessment question version.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The label for the question choice that appears on the user interface.

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.

AssessmentQuestionVerChoiceChangeEvent
Change events are available for the object.

AssessmentQuestionVerChoiceFeed
Feed tracking is available for the object.

AssessmentQuestionVerChoiceHistory
History is available for tracked fields of the object.

AssessmentQuestionVerChoiceOwnerSharingRule
Sharing rules are available for the object.

AssessmentQuestionVerChoiceShare
Sharing is available for the object.

AssessmentReason

Represents the reasons for an assessment such as the associated coverage information. 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()`

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime

Field	Details
	Properties Filter, Nillable, Sort **Description** The date when the record was last referenced.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The date when the record was last viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
`ParentAssessmentId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The parent assessment record that this assessment record belongs to. This field is a relationship field. **Relationship Name** ParentAssessment **Relationship Type** Master-detail **Refers To** Assessment (the master object)
`ReferenceRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The reason for the assessment. This field is a polymorphic relationship field.

Field	Details
	Relationship Name ReferenceRecord **Refers To** ClinicalServiceRequest, MedicationRequest
`ReferenceValue`	**Type** textarea **Properties** Create, Nillable, Update **Description** The assessment reason in JSON format when there is no Salesforce record to be added as the reference record.

Associated Objects

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

AssessmentReasonChangeEvent
Change events are available for the object.

AssessmentReasonFeed
Feed tracking is available for the object.

AssessmentReasonHistory
History is available for tracked fields of the object.

AssessmentSavedSession

Represents a session of an assessment that's saved to resume for later. 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()`

Fields

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

Field	Details
	Description The assessment record for which the session is saved. This field is a relationship field. **Relationship Name** Assessment **Relationship Type** Master-detail **Refers To** Assessment
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced the record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed the record.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the assessment saved session record.
`UsageType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the use case of the saved assessment session. Possible values are: • `HealthCloud`

AssessmentSignature

Stores the respondent's signature during an assessment. This object is available in API version 57.0 and later.

Supported Calls

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

Fields

Field	Details
`AssessmentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The assessment that's associated with the signature. This field is a relationship field. **Relationship Name** Assessment **Relationship Type** Lookup **Refers To** Assessment
`DateTime`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time of signature.
`DigitalSignatureId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The digital signature that's associated with the assessment signature record. This field is a relationship field. **Relationship Name** DigitalSignature

Field	Details
	Relationship Type Lookup **Refers To** DigitalSignature
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of this assessment signature record.
`OmniscriptIdentifier`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Identifier of signature instance in OmniScript Form.
`Place`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The location at the time of signature.

Field	Details
SignedBy	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the individual who signed the assessment.
SignedInitial	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The initial used when signing the assessment.
SigneeId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user or contact who signed the assessment. This field is a polymorphic relationship field. **Relationship Name** Signee **Relationship Type** Lookup **Refers To** Contact, 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.

AssessmentSignatureChangeEvent
Change events are available for the object.

AssessmentSignatureFeed
Feed tracking is available for the object.

AssessmentSignatureHistory
History is available for tracked fields of the object.

AssessmentSignatureOwnerSharingRule
Sharing rules are available for the object.

AssessmentSignatureShare
Sharing is available for the object.

AssessmentStagedData

Represents the responses to assessment questions when a user captures and submits information with the Discovery Framework Data Capture Flow on a mobile device. The information is used to create assessment and related records. This object is available in API version 63.0 and later.

Supported Calls

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

Fields

Field	Details
`DynamicDataCaptureId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The Dynamic Data Capture associated with the assessment staged data. This field is a relationship field. **Relationship Name** DynamicDataCapture **Refers To** DynamicDataCapture
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Auto-assigned number that identifies the assessment staged data record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns the record. This field is a polymorphic relationship field.

Field	Details
	Relationship Name Owner **Refers To** Group, User
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent associated with the assessment staged data record. This field is a relationship field. **Relationship Name** Parent **Refers To** AssessmentStagedData
`Response`	**Type** textarea **Properties** Create, Nillable, Update **Description** The response to assessment questions as submitted by users, in JSON format.
`ResponseProcessingError`	**Type** textarea **Properties** Filter, Nillable, Sort **Description** The error encountered while processing the question responses for creating assessment and related records.
`ResponseProcessingStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the processing of question responses, and the creation of the assessment and its related records. Possible values are: • `Completed`

Field	Details
	• `Failed` • `Pending` The default value is `Pending`.

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.

AssessmentStagedDataChangeEvent
Change events are available for the object.

AssessmentStagedDataFeed
Feed tracking is available for the object.

AssessmentStagedDataHistory
History is available for tracked fields of the object.

AssessmentStagedDataOwnerSharingRule
Sharing rules are available for the object.

AssessmentStagedDataShare
Sharing is available for the object.

DocumentDecisionRequirement

Represents the decision criteria that will be used to determine applicable documents. 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()`

Fields

Field	Details
`Context`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The context that's used to determine the applicable documents to be uploaded.
`DocumentReferenceObjectId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The document category or the document type related to the document decision. This field is a polymorphic relationship field. **Relationship Name** DocumentReferenceObject **Relationship Type** Lookup **Refers To** DocumentCategory, DocumentType
`HelpText`	**Type** string **Properties** Create, Filter, Nillable, Sort, Update **Description** The help information to show to memebers when uploading the document.
`IsUploadRequired`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether a document upload for a document category is required (true) or not (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who created the relationship record. 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.

DocumentDecisionRequirementChangeEvent
Change events are available for the object.

DocumentDecisionRequirementFeed
Feed tracking is available for the object.

DocumentDecisionRequirementHistory
History is available for tracked fields of the object.

DocumentDecisionRequirementOwnerSharingRule
Sharing rules are available for the object.

DocumentDecisionRequirementShare
Sharing is available for the object.

ExternalAssessmentDefinition

Stores information about external assessments. 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()`

Fields

Field	Details
`AssessmentCategory`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the guideline category the external assessment belongs to. Possible values are: • `CCG` • `TC`
`AssessmentContentVersion`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The version number of the external assessment's content.
`CustomAssessmentDisclaimer`	**Type** textarea **Properties** Create, Nillable, Update **Description** A disclaimer for custom assessments sent by the external API.
`ExternalIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The unique identifier of the external assessment.

Field	Details
`IsCustomAssessment`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the external assessment is a custom assessment authored by the user (true) or an out-of-the-box assessment (false). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who created the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup

Field	Details
	Refers To Group, User
`SourceSystemName`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The source system from which the record was retrieved. Possible values are: • `MCG`

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.

ExternalAssessmentDefinitionFeed
Feed tracking is available for the object.

ExternalAssessmentDefinitionHistory
History is available for tracked fields of the object.

ExternalAssessmentDefinitionShare
Sharing is available for the object.

OmniProcessAsmtQuestionVer

Represents a junction between an OmniScript process and an assessment question version. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description Required. The ID of assessment question version associated with the Omni Process assessment question version record. This is a relationship field. **Relationship Name** AssessmentQuestionVersion **Relationship Type** Lookup **Refers To** AssessmentQuestionVersion
`IsImportant`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the assessment question version is important (`true`) or not (`false`). The default value is `false`. Available in API version 59.0 and later.
`IsPrefill`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the assessment question version is prefilled (`true`) or not (`false`). The default value is `false`. Available in API version 60.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Required. The name of the Omni Process assessment question version record.
`OmniProcessElementId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The ID of the Omni Process element associated with the Omni Process assessment question version record. This is a relationship field. **Relationship Name** OmniProcessElement **Relationship Type** Lookup **Refers To** OmniProcessElement
`OmniProcessId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The ID of the Omni Process associated with the Omni Process assessment question version record. This is a relationship field. **Relationship Name** OmniProcess **Relationship Type** Lookup **Refers To** OmniProcess

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who created the relationship record. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User

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.

OmniProcessAsmtQuestionVerChangeEvent
Change events are available for the object.

OmniProcessAsmtQuestionVerFeed
Feed tracking is available for the object.

OmniProcessAsmtQuestionVerHistory
History is available for tracked fields of the object.

OmniProcessAsmtQuestionVerOwnerSharingRule
Sharing rules are available for the object.

OmniProcessAsmtQuestionVerShare
Sharing is available for the object.

SuggestedAssessmentDef

Stores information about suggested assessments. 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()`

Fields

Field	Details
AssessmentDefinitionRefId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The reference record of the object associated with the suggested assessment. This field is a polymorphic relationship field. **Relationship Name** AssessmentDefinitionRef **Relationship Type** Lookup **Refers To** ExternalAssessmentDefinition, OmniProcess
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update

Field	Details
	Description The ID of the user who created the record. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartyId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The party for whom the assessment is suggested. This field is a polymorphic relationship field. **Relationship Name** Party **Relationship Type** Lookup **Refers To** Account
`SourceContextId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The context from which the suggested assessment definition record was created. This field is a polymorphic relationship field. **Relationship Name** SourceContext **Relationship Type** Lookup **Refers To** Case, ClinicalServiceRequest
`Status`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the status of the suggested assessment. Possible values are: • `Completed` • `Ignored` • `InProgress`—In Progress • `Suggested`

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.

SuggestedAssessmentDefFeed
Feed tracking is available for the object.

SuggestedAssessmentDefHistory
History is available for tracked fields of the object.

SuggestedAssessmentDefShare
Sharing is available for the object.

SuggestedAssessmentReason

Stores the reasons for a suggested assessment. 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()`

Fields

Field	Details
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user referenced this record.

Field	Details
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The most recent date on which a user viewed this record.
Name	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record.
PrimaryAsmtQuestionResponseId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The response value in the primary assessment that triggered the suggested assessment. This field is a relationship field. **Relationship Name** PrimaryAsmtQuestionResponse **Relationship Type** Lookup **Refers To** AssessmentQuestionResponse
PrimaryAssessmentId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The primary assessment from which a suggested assessment was triggered. This field is a relationship field. **Relationship Name** PrimaryAssessment **Relationship Type** Lookup **Refers To** Assessment

Field	Details
SuggestedAssessmentDefId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The suggested assessment associated with the suggested assessment reason. This field is a relationship field. **Relationship Name** SuggestedAssessmentDef **Relationship Type** Lookup **Refers To** SuggestedAssessmentDef
SuggestionSourceType	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the source of the logic by which an assessment was suggested. Possible values are: • Business Rule • MCG

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.

SuggestedAssessmentReasonFeed
Feed tracking is available for the object.

SuggestedAssessmentReasonHistory
History is available for tracked fields of the object.

Discovery Framework 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**.

AssessmentQuestion
Represents the container object that stores the questions required for an assessment.

AssessmentQuestionSet
Represents the container object for Assessment Questions.

DocumentCategory
Represents a document category.

DocumentCategoryDocumentType
Represents the junction between a DocumentCategory and a DocumentType. Puts a DocumentType in a DocumentCategory.

DocumentType
Represents a document type.

OmniScript
Represents an OmniScript for the Discovery Framework, which guides users through sales, service, and other business processes. For Discovery Framework, the customization type is *`discoveryframework`*.

Supported Metadata Channels
In Discovery Framework, you can create questions and question sets to categorize questions, and you can move such a dataset across multiple orgs. A metadata wrapper is automatically created for these objects.

Flow for Discovery Framework
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.

AssessmentQuestion

Represents the container object that stores the questions required for an assessment.

Parent Type

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

File Suffix and Directory Location

AssessmentQuestion components have the suffix `.AssessmentQuestion` and are stored in the `AssessmentQuestions` folder.

Version

AssessmentQuestion components are available in API version 55.0 and later.

Fields

Field Name	Description
`assessmentQuestionVersion`	**Field Type** AssessmentQuestionVersion

Field Name	Description
	Description The object that stores the question versions for the assessment questions.
`dataType`	**Field Type** string **Description** Required. The data type of the assessment question.
`developerName`	**Field Type** string **Description** Required. The developer name of the assessment question. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
`displayTextCategory`	**Field Type** string **Description** Specifies the category of the display text when the data type is Text Block.
`formulaResponseDataType`	**Field Type** string **Description** Specifies the data type of the question response calculated by a formula.
`name`	**Field Type** string **Description** Required. The name of the record.
`questionCategory`	**Field Type** string **Description** Required. Stores the question category.

Field Name	Description
`relatedQuestion`	**Field Type** string **Description** Specifies the related question. Used to define a question hierarchy.

AssessmentQuestionVersion

Stores the question versions for the assessment questions.

Field Name	Description
`additionalInformation`	**Field Type** string **Description** The additional details for a UI element, such as the disclosure text.
`description`	**Field Type** string **Description** The description for the assessment question. This text isn't rendered on the assessment.
`guidanceInformation`	**Field Type** string **Description** The guidance for the assessment question.
`helpText`	**Field Type** string **Description** The text that's added as an info bubble in the UI element related to the assessment question.
`isActive`	**Field Type** boolean **Description** Required. Indicates whether the current version of the assessment question is set to active (`true`) or not (`false`). The default value is `false`.
`name`	**Field Type** string

Field Name	Description
	Description Required. Name of the assessment question version record.
optionSourceResponseValue	**Field Type** boolean **Description** Indicates whether the response value source for an assessment question is configured as custom (`true`) or sObject in the OmniStudio designer (`false`). The default value is `false`.
questionText	**Field Type** string **Description** Required. The assessment question text. Contains the label for the assessment question that appears on the assessment.
responseValues	**Field Type** string **Description** Holds the values to be defined in the picklist, multiselect picklist, or radio buttons.
status	**Field Type** string **Description** Required. Status of the assessment question version. Possible values are Draft, Active, or Archived.
versionNumber	**Field Type** int **Description** Required. The assessment question version number.

Declarative Metadata Sample Definition

The following is an example of an AssessmentQuestion component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AssessmentQuestion
```

```
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <assessmentQuestionVersion>
  <additionalInformation>ParentQuestionDevName AI</additionalInformation>
  <description>ParentQuestionDevName Desc</description>
  <helpText>ParentQuestionDevName HT</helpText>
  <isActive>true</isActive>
  <name>ParentQuestionDevName</name>
  <optionSourceResponseValue>true</optionSourceResponseValue>
  <questionText>ParentQuestionDevName Text</questionText>
  <status>Active</status>
  <versionNumber>1</versionNumber>
 </assessmentQuestionVersion>
 <dataType>DateTime</dataType>
 <developerName>ParentQuestionDevName</developerName>
 <name>ParentQuestionDevName</name>
 <questionCategory>Demographic</questionCategory>
</AssessmentQuestion>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>*</members>
  <name>AssessmentQuestion</name>
 </types>
 <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage

Before you retrieve assessment questions, we recommend that you review these considerations.

- When you retrieve an assessment question, you also get the related assessment question version with the status Active..

  Note: If an active assessment question version doesn't exist for the assessment question, then the latest assessment question version with Status as Draft is retrieved.

- The value for the `<status>` tag in the XML definition must match the status of the related assessment question version.
- If an assessment question has a related assessment question (parent question), the XML definition must include the developer name of the related assessment question.
- If the fields of an assessment question contain values, the XML definition must contain tags with those values when retrieving it.

Before you deploy assessment questions, we recommend that you review these considerations.

- If the Related Question isn't available in the target org, deploying the assessment question fails.

- If an assessment question with the same developer name exists in the target org, deploying the assessment question updates the values of the other fields in the target org.
- If the `<versionNumber>` tag is present in the XML definition of an assessment question, deploying creates a version for that question in the target org.
- If the Related Questions aren't available in target org but available in the package, then deploying the questions inserts the Related Questions in the correct order.
- If the assessment questions are associated with flows of type Discovery Framework Data Capture Flow, then deploy the assessment questions first. After deploying the assessment questions, deploy the flows.

AssessmentQuestionSet

Represents the container object for Assessment Questions.

Parent Type

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

File Suffix and Directory Location

AssessmentQuestionSet components have the suffix `.AssessmentQuestionSet` and are stored in the `AssessmentQuestionSets` folder.

Version

AssessmentQuestionSet components are available in API version 55.0 and later.

Fields

Field Name	Description
`assessmentQuestionDeveloperNames`	**Field Type** string[] **Description** The developer names for the assessment question. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
`developerName`	**Field Type** string **Description** Required. The developer name for the assessment question set. Can contain only underscores and alphanumeric characters and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

Field Name	Description
name	**Field Type** string **Description** Required. The question set name.

Declarative Metadata Sample Definition

The following is an example of an AssessmentQuestionSet component.

```
<?xml version="1.0" encoding="UTF-8"?>
<AssessmentQuestionSet
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <developerName>QuestionSetDevName</developerName>
 <name>QuestionSetName</name>
 <assessmentQuestionDeveloperNames>QuestionDevName</assessmentQuestionDeveloperNames>
</AssessmentQuestionSet>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
 xmlns="http://soap.sforce.com/2006/04/metadata">
 <types>
  <members>*</members>
  <name>AssessmentQuestion</name>
 </types>
 <types>
  <members>*</members>
  <name>AssessmentQuestionSet</name>
 </types>
 <version>55.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage

Before you retrieve assessment question sets, we recommend that you review these considerations.

- When retrieving an assessment question set, if its fields contain values, then the XML definition must contain tags with those values.
- When retrieving an assessment question set, if that set is associated with multiple questions, then the XML definition must contain developer names of all the associated questions.

Before you deploy assessment question sets, we recommend that you review these considerations.

- When deploying an assessment question set, if an assessment question set with the same developer name doesn't exist in the target org, deploying creates one with that name.
- If an assessment question set with the same developer name exists in the target org, then deploying the question set updates the values of the other fields in the target org.
- If the questions associated with the assessment question set don't exist in the target org, deploying the assessment question set fails.
- If the questions associated with the assessment question set don’t exist in the target org but are available in the package, then deploying the assessment question sets inserts the questions in the correct order.

DocumentCategory

Represents a document category.

Parent Type

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

File Suffix and Directory Location

DocumentCategory components have the suffix `.documentCategory` and are stored in the `documentCategory` folder.

Version

DocumentCategory components are available in API version 59.0 and later.

Special Access Rules

Fields

Field Name	Description
`description`	**Field Type** string **Description** A description of the DocumentCategory.
`isProtected`	**Field Type** boolean **Description** An auto-generated value that doesn’t impact the behavior of the metadata type. The default value is `false`.
`masterLabel`	**Field Type** string

Field Name	Description
	Description Required. The master label of the DocumentCategory. This internal label doesn't get translated.

Declarative Metadata Sample Definition

The following is an example of a DocumentCategory component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DocumentCategory xmlns="http://soap.sforce.com/2006/04/metadata">
    <masterLabel>Address_Proof</masterLabel>
</DocumentCategory>
```

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

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>DocumentCategory</name>
    </types>
    <version>59.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

DocumentCategoryDocumentType

Represents the junction between a DocumentCategory and a DocumentType. Puts a DocumentType in a DocumentCategory.

Parent Type

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

File Suffix and Directory Location

DocumentCategoryDocumentType components have the suffix `.documentCategoryDocumentType` and are stored in the `documentCategoryDocumentTypes` folder.

Version

DocumentCategoryDocumentType components are available in API version 59.0 and later.

Special Access Rules

Fields

Field Name	Description
`documentCategory`	**Field Type** string **Description** Required. The master label of the related DocumentCategory.
`documentType`	**Field Type** string **Description** Required. The master label of the related DocumentType.
`isProtected`	**Field Type** boolean **Description** An auto-generated value that doesn't impact the behavior of the metadata type. The default value is `false`.
`masterLabel`	**Field Type** string **Description** Required. The master label of the DocumentCategoryDocumentType. This internal label doesn't get translated.

Declarative Metadata Sample Definition

The following is an example of a DocumentCategoryDocumentType component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DocumentCategoryDocumentType xmlns="http://soap.sforce.com/2006/04/metadata">
    <documentCategory>Address_Proof</documentCategory>
    <documentType>Utility_Bill</documentType>
    <masterLabel>junction1</masterLabel>
</DocumentCategoryDocumentType>
```

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

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>DocumentCategory</name>
    </types>
    <types>
        <members>*</members>
        <name>DocumentCategoryDocumentType</name>
    </types>
    <types>
        <members>*</members>
        <name>DocumentType</name>
    </types>
    <version>59.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

DocumentType

Represents a document type.

Parent Type

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

File Suffix and Directory Location

DocumentType components have the suffix `.documentType` and are stored in the `documentTypes` folder.

Version

DocumentType components are available in API version 59.0 and later.

Special Access Rules

Fields

Field Name	Description
`description`	**Field Type** string

Field Name	Description
	Description A description of the DocumentType.
isActive	**Field Type** boolean **Description** Required. Specifies whether the DocumentType is active.
masterLabel	**Field Type** string **Description** Required. The master label of the DocumentType. This internal label doesn't get translated.

Declarative Metadata Sample Definition

The following is an example of a DocumentType component.

```
<?xml version="1.0" encoding="UTF-8"?>
<DocumentType xmlns="http://soap.sforce.com/2006/04/metadata">
    <description>Utility_Bill</description>
    <isActive>true</isActive>
    <masterLabel>Utility_Bill</masterLabel>
</DocumentType>
```

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

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>DocumentType</name>
    </types>
    <version>59.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

OmniScript

Represents an OmniScript for the Discovery Framework, which guides users through sales, service, and other business processes. For Discovery Framework, the customization type is *discoveryframework*.

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

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

File Suffix and Directory Location

OmniScript components have the suffix `omniScript` and are stored in the `omniScripts` folder.

Version

OmniScript components are available in API version 56.0 and later.

Special Access Rules

To use this metadata type, you must have an OmniStudio license and the Discovery Framework feature enabled in your Salesforce org.

Fields

Field Name	Description
`customHtmlTemplates`	**Field Type** string **Description** The angular OmniScript template definitions.
`customJavaScript`	**Field Type** string **Description** The custom JavaScript used for an OmniScript.
`designerCustomizationType`	**Field Type** string **Description** The OmniStudio designer customization type.
`elementTypeComponentMapping`	**Field Type** string **Description** Overrides all elements of one type with a custom Lightning web component by mapping the element type to the Custom LWC.

Field Name	Description
`isActive`	**Field Type** boolean **Description** Indicates whether the OmniScript is active (`true`) or not (`false`). The default value is `false`.
`isIntegrationProcedure`	**Field Type** boolean **Description** Indicates whether OmniScript is an Integration Procedure (`true`) or OmniScript metadata (`false`). The default value is `false`.
`isMetadataCacheDisabled`	**Field Type** boolean **Description** Indicates whether metadata cache for the integration procedure is disabled (`true`) or not (`false`). The default value is `false`.
`isOmniScriptEmbeddable`	**Field Type** boolean **Description** Indicates whether the OmniScript can be embedded in other OmniScripts (`true`) or not (`false`). The default value is `false`
`isTestProcedure`	**Field Type** boolean **Description** Indicates whether OmniScript is a test procedure setting (`true`) or not (`false`). The default value is `false`
`isWebCompEnabled`	**Field Type** boolean **Description** Indicates whether web component OmniScript (not Angular) is enabled (`true`) or not (`false`). The default value is `false`
`language`	**Field Type** string **Description** Required. The language of the OmniScript.

Field Name	Description
`lastPreviewPage`	**Field Type** string **Description** The last page previewed in the OmniScript designer.
`name`	**Field Type** string **Description** Required. The name of the OmniScript.
`namespace`	**Field Type** string **Description** The namespace associated with this OmniScript record.
`omniAssessmentTasks`	**Field Type** OmniAssessmentTask[] **Description** The omniAssessmentTasks associated with the OmniScript. Available in API version 63.0 and later. This field is available only if the Dynamic Assessment Access license is enabled.
`omniProcessElements`	**Field Type** OmniProcessElement[] **Description** The OmniProcessElements associated with the OmniScript.
`omniProcessKey`	**Field Type** string **Description** The integration procedure `Type_SubType` value.
`omniProcessType`	**Field Type** OmniProcessType (enumeration of type string) **Description** Required. Integration Procedure or OmniScript. Possible value is: • `OmniScript`

Field Name	Description
`overrideKey`	**Field Type** string **Description** Reserved for future use.
`propertySetConfig`	**Field Type** string **Description** The configuration information associated with the OmniScript.
`questionDevName`	**Field Type** string **Description** The developer name of the assessment question in the OmniScript. Note: This field is relevant only for OmniScripts with `designerCustomizationType` as *`discoveryframework`*.
`requiredPermission`	**Field Type** string **Description** The required permissions to execute the integration procedure.
`responseCacheType`	**Field Type** string **Description** Response cache used for the integration procedure (session or Org).
`subType`	**Field Type** string **Description** Required. The OmniScript sub type value.
`type`	**Field Type** string **Description** Required. The OmniScript type value.
`uniqueName`	**Field Type** string

Field Name	Description
	Description Required. The unique name for the OmniScript as Type_SubType_Language_VersionNumber.
`versionNumber`	**Field Type** string **Description** Required. The OmniScript version number.
`webComponentKey`	**Field Type** string **Description** Internal unique key for the generated Lightning Web Components (LWC).

OmniAssessmentTask

Represents the omni assessment tasks associated with the OmniScript.

Field Name	Description
`name`	**Field Type** string **Description** Required. The name of the omni assessment task.
`status`	**Field Type** picklist **Description** The status of the omni assessment task. Possible values are: • `Completed` • `InProgress`—In Progress • `IsDefined`—Is Defined • `NotStarted`—Not Started The default value is `IsDefined`.
`uniqueName`	**Field Type** string

Field Name	Description
	Description A unique name for the omni assessment task.

OmniProcessElement

Represents the OmniScript element associated with the OmniScript.

Field Name	Description
`childElements`	**Field Type** OmniProcessElement[] **Description** The child elements associated with the OmniProcessElement.
`description`	**Field Type** string **Description** The description of the OmniProcessElement.
`designerCustomizationType`	**Field Type** string **Description** The OmniStudio designer customization type. Note: To create assessment questions using the Discovery Framework feature, use the customization type as *`discoveryframework`*.
`discoveryFrameworkUsageType`	**Field Type** string **Description** The usage type for industries that use the Discovery Framework. For example, the value for Health Cloud is `HcUsageType`. The value for no specific industry is `Default`.
`embeddedOmniScriptKey`	**Field Type** string **Description** The ID of the embedded OmniScript
`isActive`	**Field Type** boolean

Field Name	Description
	Description Indicates whether the status of the OmniProcessElement is active (`true`) or not (`false`).
`isOmniScriptEmbeddable`	**Field Type** boolean **Description** Indicates whether the OmniScript with the OmniProcessElement can be embedded in other OmniScripts (`true`) or not (`false`).
`level`	**Field Type** double **Description** The vertical level in which the OmniProcessElement occurs on the OmniScript.
`name`	**Field Type** string **Description** Required. The name of the OmniProcessElement.
`omniProcessVersionNumber`	**Field Type** double **Description** The related OmniProcess version.
`parentElementName`	**Field Type** string **Description** The name of the parent OmniProcessElement.
`parentElementType`	**Field Type** string **Description** The type of the parent OmniProcessElement.
`propertySetConfig`	**Field Type** textarea **Description** The property set of the OmniProcessElement.

Field Name	Description
`QuestionDevName`	**Field Type** string **Description** The developer name of the assessment question in the OmniScript. Note: This field is relevant only for OmniScripts with `designerCustomizationType` as *`discoveryframework`*.
`sequenceNumber`	**Field Type** double **Description** The horizontal level in which the OmniProcessElement occurs on the OmniScript.
`type`	**Field Type** string **Description** The OmniProcessElement type. For example, `Text` and `TextArea`.
`uniqueIndex`	**Field Type** string **Description** A unique index number for the OmniScript.

Declarative Metadata Sample Definition

The following is an example of a OmniScript component.

```
<?xml version="1.0" encoding="UTF-8"?>
<OmniScript
 xmlns="http://soap.sforce.com/2006/04/metadata">

<elementTypeComponentMapping>{&quot;ElementTypeToHTMLTemplateList&quot;:[]}</elementTypeComponentMapping>

 <isActive>false</isActive>
 <isIntegrationProcedure>false</isIntegrationProcedure>
 <isMetadataCacheDisabled>false</isMetadataCacheDisabled>
 <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>
 <isTestProcedure>false</isTestProcedure>
 <isWebCompEnabled>true</isWebCompEnabled>
 <language>English</language>
 <name>OS5</name>
 <omniProcessElements>
  <parentElementType></parentElementType>
  <parentElementName></parentElementName>
  <description>test</description>
  <isActive>true</isActive>
```

```
  <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>
  <embeddedOmniScriptKey>key</embeddedOmniScriptKey>
  <designerCustomizationType></designerCustomizationType>
  <level>0.0</level>
  <name>Step1</name>
  <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
  <propertySetConfig>{&quot;label&quot;:&quot;Step
[illegible]
 you sure?&quot;,&quot;saveLabel&quot;:&quot;Save for
later&quot;,&quot;saveMessage&quot;:&quot;Are you sure you want to save it for
later?&quot;,&quot;completeLabel&quot;:&quot;Complete&quot;,&quot;completeMessage&quot;:&quot;Are
 you sure you want to complete the
[illegible]
 if
[illegible]

  <sequenceNumber>0.0</sequenceNumber>
  <type>Step</type>
  <questionDevName></questionDevName>
 </omniProcessElements>
 <omniProcessElements>
  <isActive>true</isActive>
  <level>0.0</level>
  <name>Step2</name>
  <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
  <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>

[illegible]
 you sure?&quot;,&quot;saveLabel&quot;:&quot;Save for
later&quot;,&quot;saveMessage&quot;:&quot;Are you sure you want to save it for
later?&quot;,&quot;completeLabel&quot;:&quot;Complete&quot;,&quot;completeMessage&quot;:&quot;Are
 you sure you want to complete the
script?&quot;,&quot;instruction&quot;:&quot;&quot;,&quot;showPersistentComponent&quot;:[true,

[illegible]

&quot;keywords&quot;:&quot;&quot;,&quot;dataCriteria&quot;:&quot;&quot;,&quot;edit&quot;:[illegible],&quot;type&quot;:&quot;&quot;},&quot;to&quot;:null,&quot;conditionType&quot;:&quot;Hide
 if
[illegible]

  <sequenceNumber>1.0</sequenceNumber>
  <type>Step</type>
  <questionDevName></questionDevName>
 </omniProcessElements>
 <omniProcessElements>
  <isActive>true</isActive>
  <level>0.0</level>
  <name>Step3</name>
  <omniProcessVersionNumber>0.0</omniProcessVersionNumber>
  <isOmniScriptEmbeddable>false</isOmniScriptEmbeddable>

[illegible]
 you sure?&quot;,&quot;saveLabel&quot;:&quot;Save for
later&quot;,&quot;saveMessage&quot;:&quot;Are you sure you want to save it for
```

```
later?&quot;,&quot;completeLabel&quot;:&quot;Complete&quot;,&quot;completeMessage&quot;:&quot;Are
 you sure you want to complete the
script?&quot;,&quot;instruction&quot;:&quot;&quot;,&quot;showPersistentComponent&quot;:[true,

false],&quot;endLabel&quot;:&quot;&quot;,&quot;endMsg&quot;:&quot;&quot;,&quot;endTimeout&quot;:300,&quot;endOptions&quot;:{},&quot;knowledgeOptions&quot;:{&quot;language&quot;:&quot;English&quot;,&quot;dataCategoryCriteria&quot;:&quot;&quot;,&quot;keyword&quot;:&quot;&quot;,&quot;articleTypeFilter&quot;:&quot;&quot;},&quot;isVoice&quot;:null,&quot;conditionType&quot;:&quot;Hide
 if

  <sequenceNumber>2.0</sequenceNumber>
  <type>Step</type>
  <questionDevName></questionDevName>
 </omniProcessElements>
 <omniProcessType>OmniScript</omniProcessType>

 <subType>SBT5</subType>
 <type>Type5</type>
 <omniProcessKey>Type5_SBT5</omniProcessKey>
 <uniqueName>Type5_SBT5_English_1</uniqueName>
 <versionNumber>1.0</versionNumber>
 <nameSpace></nameSpace>
 <lastPreviewPage>LastPage</lastPreviewPage>
 <customHtmlTemplates></customHtmlTemplates>
 <customJavaScript></customJavaScript>
 <description>TestOS</description>
 <requiredPermission>OmniStudioAdmin</requiredPermission>
 <responseCacheType>Org Cache</responseCacheType>
 <designerCustomizationType></designerCustomizationType>
 <webComponentKey>WebComponentKey</webComponentKey>
 <overrideKey></overrideKey>
</OmniScript>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package
    xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>OmniScript</name>
    </types>
    <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage Type

Before you retrieve or deploy Discovery Framework OmniScripts, we recommend that you review these considerations.

- If the `DesignerCustomizationType` of the OmniScript is `discoveryframework`, then the questions in the OmniScript must be within the `<uniqueIndex>` tag in the metadata definition file.
- When deploying the OmniScript of type Discovery Framework, enable Discovery Framework Metadata Enabled setting.
- OmniScripts of type Discovery Framework don't support IDX Workbench.
- If any question associated with the OmniScript doesn't exist in the target org or, if the active version of that question doesn't exist in the target org, then deploying the OmniScript fails.

Supported Metadata Channels

In Discovery Framework, you can create questions and question sets to categorize questions, and you can move such a dataset across multiple orgs. A metadata wrapper is automatically created for these objects.

Metadata APIs provide ways to package those datasets and move them across orgs. There are multiple ways to export or import datasets from one org to another. Each way is a metadata channel that provides some specific features with the import or export. The public metadata API is the basic way in which metadata is serialized so that clients can read, edit, and deploy the data into the same or another organization. Exposure in the public metadata API is a prerequisite for these channels.

Second-Generation Managed Packages

Managed packages are used by Salesforce partners to distribute and sell applications to customers.

Unlocked Packaging

Unlocked packages are especially suited for internal business apps. You can use unlocked packages to organize your existing metadata, package an app, extend an app that you've purchased from AppExchange, or package new metadata.

Unmanaged Package

Unmanaged packages are typically used to distribute open-source projects or application templates to provide developers with the basic building blocks for an application.

Change Sets

Use change sets to send customizations from one Salesforce org to another. For example, you can create and test a new object in a sandbox org, then send it to your production org using a change set.

Salesforce CLI

Salesforce CLI is the client-side tool at the center of the modern Salesforce developer experience. It's a command-line interface that simplifies development and build automation when working with Salesforce orgs. Use it to create and manage orgs, synchronize metadata to and from orgs, create and install packages, and more.

Source Control Integration/Source-Driven Development

A scratch org is a source-driven and disposable deployment of Salesforce code and metadata. A scratch org is fully configurable, allowing developers to emulate different Salesforce editions with different features and preferences.

Usage

When importing or exporting the Discovery Framework metadata APIs types across the supported channels, we recommend that you review these considerations:

- When you deploy metadata with a managed package, the namespace is inserted in setup and platform objects.

- When a dataset is deployed using a change set, the created setup object record has the namespace of the target org only. The created platform object record has the Null namespace.
- When deploying a beta or released version of the managed package in a target org, the installation creates both setup and platform objects for AssessmentQuestion and AssessmentQuestionSets. The setup object and developerName of the platform object for AssessmentQuestion and AssessmentQuestionSets are not editable in a target org. Assessment questions in Beta packages are also not editable.
- You can update or upgrade a released version of the managed package. Setup and platform objects for AssessmentQuestion and AssessmentQuestionSets are updated if there are changes in the upgraded version.
- Uninstalling the beta version of the managed package deletes the metadata from the target org. Setup objects are deleted for AssessmentQuestion and AssessmentQuestionSets.
- When using a scratch org,
  - Create the scratch org definition with:

```
{
  "orgName": "Sample Org",
  "edition": "developer",
  "features": [
    "ASSESSMENTS"
  ],
  "settings": {
    "industriesSettings": {
      "enableIndustriesAssessment": true,
      "enableDiscoveryFrameworkMetadata": true
    }
  }
}
```

  - Enabling Discovery Framework (ASSESSMENTS) enables both AssessmentQuestion and AssessmentQuestionSet and enabling enableDiscoveryFrameworkMetadata enables the metadata for both AssessmentQuestion and AssessmentQuestionSet.
  - Add the Assessment to the page layout. See Page Layouts in Salesforce Help for more information.
- Deploying or retrieving the OmniScript metadata API for Discovery Framework is supported only in Change Sets, Salesforce CLI, Source Control Integration/Source-Driven Development, and public metadata API channels only.

Flow for Discovery Framework

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

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

Field Name	Field Type	Description
`actionType`	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Discovery Framework include: • `getAssessmentResponseSummary`—Invoke the Get Assessment Response Summary action. This value is available in API version 57.0 and later.

Discovery Framework Invocable Actions

Use actions to invoke Discovery Framework actions in a flow.

Get Assessment Response Summary

Get Assessment Response Summary makes it easy to use a flow to trigger server-side document generation using Document Generation.

Get Assessment Response Summary

Get Assessment Response Summary makes it easy to use a flow to trigger server-side document generation using Document Generation.

In the Discovery Framework, the responses from an assessment are stored in the AssessmentQuestionResponse object and the form metadata stays in the OmniScript. You can use this invocable action to pass assessment summary data to downstream processes. This invocable action provides summary JSON code that can be consumed in Document Generation workflows to generate documents.

The Get Assessment Response Summary invocable action takes an assessment ID as input to get the OmniScript (OmniProcess) ID, which is used to retrieve the OmniScript. The assessment ID also retrieves the assessment response and merges the response with the OmniScript to create an assessment summary response in the summary JSON code.

This object is available in API version 56.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v56.0/actions/standard/getAssessmentResponseSummary`

Formats

JSON

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
assessmentId	**Type** ID **Description** Required. The ID of the assessment record for which to summarize responses.

Outputs

Output	Details
assessmentResponseSummary	**Type** string **Description** A JSON string containing the summary assessment question texts and responses for the specified assessment record. The response summary structure follows the structure of the OmniScript.

Usage

Sample Input

When exposing the Get Assessment Response Summary invocable action in a REST API, you can use the following format to pass input, which includes the assessmentId and its value.

```
{
  "inputs" : [ {"assessmentId" : "0U3RO00000005FN0AY"} ]
}
```

Sample Output

In this example, the first line indicates the OmniScript type, subtype, and language. For each step, there are multiple questions that appear in the OmniScript. You can use this information in a downstream process, such as PDF file rendering using Document Generation.

```
  "KYC_Individual_English": {
    "Step1": {
      "label": "Identity Details",
      "value": {
        "LC_Survey_Question_2": {
          "label": "Full Name",
          "value": "Joe Smith"
        },
        "DateofBirth_m": {
          "label": "Date of Birth",
          "value": "Thu Jul 27 00:00:00 GMT 2000"
        },
        "Gender_m": {
```

```
          "label": "Gender",
          "value": "Female"
        },
        "EmailAddress_m": {
          "label": "Email Address",
          "value": "Joe.Smith@company.com"
        },
        "PAN": {
          "label": "PAN",
          "value": "QWEASDZXC"
        }
      }
    },
    "Step2": {
      "label": "Address Details",
      "value": {
        "Address_CorrespondenceAdd_Corporate": {
          "label": "Address of Correspondence",
          "value": "100 Some St, San Francisco, CA 12345, United States"
        },
        "Address_ContactDetails_Corporate": {
          "label": "Telephone/Mobile",
          "value": "1616111233"
        },
        "Alternate_Contact": {
          "label": "Alternate Mobile Number",
          "value": "1911212123"
        }
      }
    },
    "Step3": {
      "label": "Account Declaration",
      "value": {
        "Account_declaration": {
          "label": "I declare that I have following deposit accounts with your/
other bank's branches :",
          "value": [
            {
              "Bank": {
                "label": "Bank",
                "value": "Acme1"
              },
              "Branch": {
                "label": "Branch",
                "value": "Mission St"
              },
              "Type_of_Account": {
                "label": "Type of Account",
                "value": "Checking"
              },
              "Account_Number": {
                "label": "Account Number",
                "value": "12345678"
              }
```

```
            },
            {
              "Bank": {
                "label": "Bank",
                "value": "Acme2"
              },
              "Branch": {
                "label": "Branch",
                "value": "Mission St"
              },
              "Type_of_Account": {
                "label": "Type of Account",
                "value": "Savings"
              },
              "Account_Number": {
                "label": "Account Number",
                "value": "1234567890"
              }
            }
          ]
        }
      }
    },
    "Step4": {
      "label": "Declaration",
      "value": {
        "Declaration_m": {
          "label": "The customer declares and certifies that the information in this
form is true and correct. Any pre-filled sections of this form must be reviewed prior
 to signing and submitting, to ensure the information accurately conveys the new
account details.",
          "value": "true"
        }
      }
    }
  }
}
```


Discovery Framework Tooling API Objects

Tooling API exposes metadata used in developer tooling that you can access through REST or SOAP. Tooling API's SOQL capabilities for many metadata types allow you to retrieve smaller pieces of metadata. For more information about Tooling API objects and to find a complete reference of all the supported objects, see **Introducing Tooling API**.

AssessmentQuestionConfig

Represents the assessment question record metadata configuration. This object is available in API version 56.0 and later.

AssessmentQuestionSetConfig

Reqpresents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

SEE ALSO:

Tooling API Developer Guide: SOAP Calls

AssessmentQuestionConfig

Represents the assessment question record metadata configuration. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

`GET, HEAD, Query`

Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

Fields

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

Field	Details
	Description Language of the assessment question.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label of the assessment question.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

AssessmentQuestionSetConfig

Reqpresents the assessment question set record metadata configuration. This object is available in API version 56.0 and later.

Supported SOAP API Calls

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

Supported REST API Methods

`GET, HEAD, Query`

Special Access Rules

To use this tooling API object, you must enable the Discovery Framework feature in your Salesforce org.

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique DeveloperName for each record. If no DeveloperName is specified, performance slows down while Salesforce generates one for each record.
`Language`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Language of the assessment question set.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are:

Field	Details
	• `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label of the assessment question set.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

Discovery Framework Connect APIs

Use the Discovery Framework Document Decision Connect APIs to invoke a Decision Table, accept key-value pairs that match the Decision Table keys, and return either Document Types or Document Categories.

Discovery Framework API Resources
Here's the list of the Discovery Framework Document Decision API resources.

Discovery Framework API Requests
Here's the list of the Discovery Framework Document Decision API request bodies.

Discovery Framework API Responses
Here's the list of the Discovery Framework Document Decision API response bodies.

Discovery Framework API Resources

Here's the list of the Discovery Framework Document Decision API resources.

Assessment Responses

Save assessment responses from an OmniScript built with the Assessment Questions app.

Document Decision

Invoke a Decision Table, accept key-value pairs that match the Decision Table keys, and return either Document Types or Document Categories and the Document Types associated with them.

Omniscript

Get the discovery framework structure stored as OmniProcess.

Assessment Responses

Save assessment responses from an OmniScript built with the Assessment Questions app.

This feature requires OmniStudio and Discovery Framework licenses. To build an OmniScript using the Assessment Questions app, see Create a Form.

In in Health Cloud, this API captures supporting information for a Prior Authorization (PA) by recording responses from the Documentation Template and Rules Questionnaire. It associates these responses with a specific PA request and is triggered as part of the `$submit` API from Mulesoft.

Resource

```
/connect/discovery-framework/assessment-responses/omniScriptId
```

Available version

60.0

HTTP methods

POST

Request body for POST

JSON example

```
{
    "inputs": {
        "questionResponses": {
            "ootb__DF_API_MSelect1": "Y;N",
            "ootb__DF_API_MSelect2": "1;2;3",
            "ootb__DF_API_RG1": {
                "ootb__DF_API_Radio1": "Y",
                "ootb__DF_API_Radio2": "N",
                "ootb__DF_API_Radio3": "M"
            },
            "ootb__DF_API_Text": "TestingDF",
            "ootb__DF_API_Select1": "1",
            "ootb__DF_API_Select2": "w",
            "ootb__DF_API_EditBlock2": {
                "ootb__DF_API_Int": 5
            },
            "ootb__DF_API_Boolean": true,
            "ootb__DF_API_Formula": true
        }
    },
    "contextId": "0U3B00000004IhWKAU",
    "assessmentValues": {
```

```
        "Assessment.AssessmentStatus": "Completed",
        "completedDateTime": "2024-10-23T14:45:29.123+05:30",
        "assessor": "001SG00000laIWPYA2",
        "identifier": "Test identifier",
        "assessmentDetails": {
            "assessmentReasons": [
                {
                    "referenceRecord": "0jySG0000000qRdYAI"
                },
                {
                    "referenceRecord": "0SqSG00000005HR0AY"
                },
                {
                    "referenceRecord": "0kmSG0000000n7BYAQ",
                    "referenceValue": "Medication Request sample"
                },
                {
                    "referenceValue": "Reference Record not present"
                }
            ],
            "assessmentQuestionsResponseDetails": {
                "First_Name": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Last_Name": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Email": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Phone": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Multi_Select": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                }
            }
        }
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`assessmentValues`	Assessment Values Input> on page 1312[]	Values of Assessment fields.	Optional	60.0
`contextId`	String	Context record for the OmniScript.	Optional	60.0
`inputs`	Question Responses Input[]	Responses for Assessment Questions.	Optional	60.0

Response body for POST

Assessment Responses Output

Document Decision

Invoke a Decision Table, accept key-value pairs that match the Decision Table keys, and return either Document Types or Document Categories and the Document Types associated with them.

For example, one use case is applying for a driver's license. Based on questions about where the applicant lives, a Decision Table can list the documents to be uploaded for proof of identity.

The Decision Table must be active and have DocumentDecisionRequirement, a platform object, as its Source Object. This platform object stores the Decision Table's inputs, outputs, and business rules.

One of the Decision Table outputs must be DocumentReferenceObjectId, which references a Document Type or Document Category object. An optional output is isUploadRequired, which sets the default for the Document Categories property isRequired. These two outputs don't appear in the connect API's outputs.

Resource

```
/connect/document-matrix/document-decision/decisionTableId
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "inputs": [
    {
      "Country": "USA",
      "State": "CA"
    }
```

```
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`inputs`	List<Map<String, Object>>	List of inputs passed to Decision Table. Each key is a Decision Table field name, and each value is valid for that field.	Required	59.0

Response body for POST

Document Decision Response

Omniscript

Get the discovery framework structure stored as OmniProcess.

Use this API to get the assessment form layout and submit the assessment data through any custom-built UI. You can show the questionnaire form, capture assessment responses, and save the assessment.

Resource

```
/connect/omniscript/omniScriptId
```

The `omniScriptId` property is the ID of the Omniscript to get the discovery framework structure stored as an OmniProcess.

Resource example

```
https://yourInstance.salesforce.com/services/data/v60.0/connect/omniscript/CreditCard_DisputeTransaction_English_1?customType=DiscoveryFramework
```

Available version

60.0

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`customType`	String	Custom type of Omniscript. For example, Discovery Framework.	Required	60.0

Response body for GET

Omniscript Output

Discovery Framework API Requests

Here's the list of the Discovery Framework Document Decision API request bodies.

Assessment Details Input

Input representation of the assessment details of Assessment Response request.

Assessment Links Input

Associated assessments including id, category, reason and sequence.

Assessment Reasons Input

Input representation of the assessment reason in Assessment Response request.

Assessment Responses Input

Input for assessment responses.

Assessment Values Input

Input representation of the assessment value of Assessment Response request.

Document Decision Input

Input representation of the Document Decision request.

Question Responses Input

Input for assessment question responses.

Assessment Details Input

Input representation of the assessment details of Assessment Response request.

JSON example

```
{
    "assessmentDetails": {
        "assessmentReasons": [
            {
                "referenceRecord": "0jySG0000000qRdxxI"
            },
            {
                "referenceRecord": "0SqSG00000005HRxxY"
            },
            {
                "referenceRecord": "0kmSG0000000n7BxxQ",
                "referenceValue": "Medication Request sample"
            },
            {
                "referenceValue": "Reference Record not present"
            }
        ],
        "assessmentQuestionsResponseDetails": {
            "First_Name": {
                "originType": "Auto",
                "reviewerRole": "0hsSG0000002t8TxxQ",
                "reviewer": "003SG00000BTzxpxxD"
            },
            "Last_Name": {
                "originType": "Auto",
                "reviewerRole": "0hsSG0000002t8TxxQ",
                "reviewer": "003SG00000BTzxpxxD"
            },
            "Email": {
```

```
                "originType": "Auto",
                "reviewerRole": "0hsSG0000002t8TxxQ",
                "reviewer": "003SG00000BTzxpxxD"
            },
            "Phone": {
                "originType": "Auto",
                "reviewerRole": "0hsSG0000002t8TxxQ",
                "reviewer": "003SG00000BTzxpxxD"
            },
            "Multi_Select": {
                "originType": "Auto",
                "reviewerRole": "0hsSG0000002t8TxxQ",
                "reviewer": "003SG00000BTzxpxxD"
            }
        }
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
assessmentQuestionResponseDetails	Map<String, Object>	The details of the assessment questions response. Only available for Health Cloud users.	Optional	63.0
assessmentReasons	List<AssessmentReasonInput> on page 1310	Details of the assessment.	Optional	63.0

Assessment Links Input

Associated assessments including id, category, reason and sequence.

Root XML tag

```
<assessmentLinks>
```

JSON example

```
  {
    "id": "0U3SG00000068Cb0AI",
    "category": "0iPSG0000024n0z2AA",
    "reason": "0iPSG0000024n0z2AA",
    "sequence": 333
  }
]
```

Properties

Name	Type	Description	Required	Available Version
category	String	The category that the supporting content belongs to.	No	63.0

Name	Type	Description	Required	Available Version
id	String	The assessment used as the supporting content.	Yes	55.0
reason	String	The reason why the supporting content is required.	No	63.0
sequence	String	The sequence number of the content when multiple contents are available.	No	63.0

Assessment Reasons Input

Input representation of the assessment reason in Assessment Response request.

JSON example

```
{
        "assessmentReasons": [
            {
                "referenceRecord": "0jySG0000000qRdxxI"
            },
            {
                "referenceRecord": "0SqSG00000005HRxxY"
            },
            {
                "referenceRecord": "0kmSG0000000n7BxxQ",
                "referenceValue": "Medication Request sample"
            },
            {
                "referenceValue": "Reference Record not present"
            }
        ]
        }
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
referenceRecord	String	Reason for the assessment.	Optional	63.0
referenceValue	String	The supporting information when there is no Salesforce record to be added as the reference record.	Optional	63.0

Assessment Responses Input

Input for assessment responses.

JSON example


```
{
    "inputs": {
        "questionResponses": {
            "ootb__DF_API_MSelect1": "Y;N",
            "ootb__DF_API_MSelect2": "1;2;3",
            "ootb__DF_API_RG1": {
                "ootb__DF_API_Radio1": "Y",
                "ootb__DF_API_Radio2": "N",
                "ootb__DF_API_Radio3": "M"
            },
            "ootb__DF_API_Text": "TestingDF",
            "ootb__DF_API_Select1": "1",
            "ootb__DF_API_Select2": "w",
            "ootb__DF_API_EditBlock2": {
                "ootb__DF_API_Int": 5
            },
            "ootb__DF_API_Boolean": true,
            "ootb__DF_API_Formula": true
        }
    },
    "contextId": "0U3B00000004IhWKAU",
    "assessmentValues": {
        "Assessment.AssessmentStatus": "Completed",
        "completedDateTime": "2024-10-23T14:45:29.123+05:30",
        "assessor": "001SG00000laIWPYA2",
        "identifier": "Test identifier",
        "assessmentDetails": {
            "assessmentReasons": [
                {
                    "referenceRecord": "0jySG0000000qRdYAI"
                },
                {
                    "referenceRecord": "0SqSG00000005HR0AY"
                },
                {
                    "referenceRecord": "0kmSG0000000n7BYAQ",
                    "referenceValue": "Medication Request sample"
                },
                {
                    "referenceValue": "Reference Record not present"
                }
            ],
            "assessmentQuestionsResponseDetails": {
                "First_Name": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Last_Name": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
```

```
                },
                "Email": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Phone": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Multi_Select": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                }
            }
        }
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`assessmentValues`	Assessment Values Input> on page 1312[]	Values of Assessment fields.	Optional	60.0
`contextId`	String	Context record for the OmniScript.	Optional	60.0
`inputs`	Question Responses Input[]	Responses for Assessment Questions.	Optional	60.0

Assessment Values Input

Input representation of the assessment value of Assessment Response request.

JSON example

```
{
    "assessmentValues": {
        "Assessment.AssessmentStatus": "Completed",
        "completedDateTime": "2024-10-23T14:45:29.123+05:30",
        "assessor": "001SG00000laIWPYA2",
        "identifier": "Test identifier",
        "assessmentDetails": {
            "assessmentReasons": [
                {
                    "referenceRecord": "0jySG0000000qRdYAI"
                },
                {
                    "referenceRecord": "0SqSG00000005HR0AY"
```

```
                },
                {
                    "referenceRecord": "0kmSG0000000n7BYAQ",
                    "referenceValue": "Medication Request sample"
                },
                {
                    "referenceValue": "Reference Record not present"
                }
            ],
            "assessmentQuestionsResponseDetails": {
                "First_Name": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Last_Name": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Email": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Phone": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                },
                "Multi_Select": {
                    "originType": "Auto",
                    "reviewerRole": "0hsSG0000002t8TYAQ",
                    "reviewer": "003SG00000BTzxpYAD"
                }
            }
        }
    }
}
```


Properties

Name	Type	Description	Required or Optional	Available Version
~~AssessmentAssessmentStatus~~	String	Status of the assessment.	Optional	60.0
assessmentDetails	AssessmentDetailsOperation on page 1308	Metadata of the Assessment Questions.	Optional	63.0
assessor	String	Person who carried out the assessment and recorded the responses.	Optional	63.0
completedDateTime	Integer	The date and time when the assessment was completed.	Optional	63.0

Name	Type	Description	Required or Optional	Available Version
`identifier`	String	Unique identifier of a completed or partially completed assessment in the source system.	Optional	63.0

Document Decision Input

Input representation of the Document Decision request.

JSON example

```
{
  "inputs": [
    {
      "Country": "USA",
      "State": "CA"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`inputs`	List<Map<String, Object>>	List of inputs passed to Decision Table. Each key is a Decision Table field name, and each value is valid for that field.	Required	59.0

Question Responses Input

Input for assessment question responses.

JSON example

The properties under `questionResponses` are in the following format:

```
{
  "questionResponses": {
    "Element_APIName or AssessmentQuestion uniqueIndex 1": "value",
    "Element_APIName or AssessmentQuestion uniqueIndex 2": {
      "Child_element_APIName or Question uniqueIndex 1": "value",
      "Child_element_APIName or Question uniqueIndex 2": "value",
     ...
    }
  }
}
```

For example:

```
{
  "questionResponses": {
```

```
    "ootb__DF_API_MSelect1": "Y;N",
    "ootb__DF_API_MSelect2": "1;2;3",
    "ootb__DF_API_RG1": {
      "ootb__DF_API_Radio1": "Y",
      "ootb__DF_API_Radio2": "N",
      "ootb__DF_API_Radio3": "M"
    },
    "ootb__DF_API_Text": "TestingDF",
    "ootb__DF_API_Select1": "1",
    "ootb__DF_API_Select2": "w",
    "ootb__DF_API_EditBlock2": {
      "ootb__DF_API_Int": 5
    },
    "ootb__DF_API_Boolean": true,
    "ootb__DF_API_Formula": true
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`question Responses`	Map<String, Object>	Responses map for Assessment Questions.	Optional	60.0

Discovery Framework API Responses

Here's the list of the Discovery Framework Document Decision API response bodies.

Additional Attributes Output
Output representation of the Additional Attributes.

Assessment Responses Output
Output of assessment responses.

Custom Type Details
Output representation of the custom type details of the Omniscript elements.

Decision Table Document Decision Output
Decision Table output.

Document Decision Output
Output representation of the Document Decision response, including Decision Table output.

Document Types Output
Output representation of the Document Type.

Omniscript Elements List
Output representation of the details of the Omniscript elements.

Omniscript Output
Output representation of the details of the Omniscript.

Omniscript Element Discovery Framework Output

Output representation of the custom type details of the Omniscript elements for Discovery Framework.

Omniscript Element Property Set Output

Output representation of the property set configuration of the Omniscript elements.

Additional Attributes Output

Output representation of the Additional Attributes.

Attribute Name	Type	Description	Filter Group and Version	Available Version
`approvalDateTime`	String	Date and time when the assessment was approved by the publisher.	Small, 63.0	63.0
`displayType`	String	Specifies the display format for questions in the assessment for the end-user. Possible values are: • `Sequential` • `Prior-edit` • `Random`.	Small, 63.0	63.0
`effectiveFromDate`	String	The date when the assessment takes effect.	Small, 63.0	63.0
`effectiveToDate`	String	The date until the assessment is in effect.	Small, 63.0	63.0
`lastRevisedDateTime`	String	The date and time when the assessment was last revised.	Small, 63.0	63.0
`performerType`	String	Specifies the type of performer that can record responses to the assessment. Possible values are: • `Patient` • `Practioner` • `Related Person`.	Small, 63.0	63.0
`purpose`	String	The purpose of the assessment.	Small, 63.0	63.0

Attribute Name	Type	Description	Filter Group and Version	Available Version
publisher	String	The organization or individual that published the assessment.	Small, 63.0	63.0

Assessment Responses Output

Output of assessment responses.

Property Name	Type	Description	Filter Group and Version	Available Version
assessmentId	String	ID of created Assessment.	Small, 60.0	60.0
message	String	Message explaining why the request failed.	Small, 60.0	60.0
status	String	Specifies whether the request succeeded (true) or failed (false).	Small, 60.0	60.0

Custom Type Details

Output representation of the custom type details of the Omniscript elements.

JSON example

```
"customTypeDetails" : {
  "discoveryFramework": {
      "questionText": "Can you provide more details about the transaction"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
discoveryFramework	OS Element Discovery Framework[]	Custom type details for the Omniscript element for Discovery framework.	Small, 60.0	60.0

Decision Table Document Decision Output

Decision Table output.

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.

Attribute Name	Type	Description	Filter Group and Version	Available Version
`defaultMaximumFileSizeAllowed`	Integer	Default maximum file size if `maximumFileSizeAllowed` is null for a Document Type.	Small, 59.0	59.0
`defaultMaximumFileUploadsAllowed`	Integer	Default maximum file uploads if `maximumFileUploadsAllowed` is null for a Document Type.	Small, 59.0	59.0
`documentCategoryId`	String	ID of the Document Category.	Small, 59.0	59.0
`documentCategoryLabel`	String	Master label of the Document Category.	Small, 59.0	59.0
`documentTypes`	Document Types Output[]	List of document types and their properties.	Big, 59.0	59.0
`helpText`	String	Help text for files in this Document Category.	Small, 59.0	59.0
`isRequired`	Boolean	Indicates whether uploading a file in this Document Category is required. If `isRequired` isn't set, the `isUploadRequired` value is used. If neither `isRequired` nor `isUploadRequired` is set, the default is `false`.	Small, 59.0	59.0

Document Decision Output

Output representation of the Document Decision response, including Decision Table output.

Property Name	Type	Description	Filter Group and Version	Available Version
`decisionTableDocumentDecisions`	Decision Table Document Decision Output	Decision Table output.	Big, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
`message`	String	Message with information about the success or failure of the request. A success message includes the number of results.	Small, 59.0	59.0
`status`	String	Indicates whether the request succeeded (`true`), or failed (`false`).	Small, 59.0	59.0

Document Types Output

Output representation of the Document Type.

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.

Attribute Name	Type	Description	Filter Group and Version	Available Version
`documentTypeId`	String	ID of the Document Type.	Small, 59.0	59.0
`document TypeLabel`	String	Master label of the Document Type.	Small, 59.0	59.0
`maximumFile SizeAllowed`	Integer	Maximum file size allowed for this Document Type, if any.	Small, 59.0	59.0
`maximumFile UploadsAllowed`	Integer	Maximum file uploads allowed for this Document Type, if any.	Small, 59.0	59.0

Omniscript Elements List

Output representation of the details of the Omniscript elements.

JSON example

```
"elements": [
  {
    "DiscoveryFrameworkUsageType": "Default",
    "DesignerCustomizationType": "Discovery Framework",
    "Type": "Step",
    "PropertySetConfig": {
      "label": "Card Details",
      "show": null,
      "conditionType": "Hide if False"
    },
    "ParentElementType": null,
    "ParentElementName": null,
    "SequenceNumber": 0,
    "OmniProcessVersionNumber": 1,
```

```
      "Level": 0,
      "Description": null,
      "Name": "Step1",
      "elements": [
        {
          "DiscoveryFrameworkUsageType": "Default",
          "DesignerCustomizationType": "Discovery Framework",
          "Type": "Radio",
          "PropertySetConfig": {
            "label": "Was the card in your possession at the time of the disputed
transactions?",
            "defaultValue": null,
            "help": false,
            "helpText": "",
            "options": [
              {
                "name": "Yes",
                "developerName": "Yes",
                "value": "Yes",
                "setAll": false
              },
              {
                "name": "No",
                "developerName": "No",
                "value": "No",
                "setAll": false
              }
            ],
            "show": null,
            "conditionType": "Hide if False"
          },
          "ParentElementType": "Step",
          "ParentElementName": "Step1",
          "SequenceNumber": 0,
          "OmniProcessVersionNumber": 1,
          "Level": 1,
          "Description": null,
          "Name": "FSC_DM_v1_CardRelatedQ1",
          "elements": [],
          "customTypeDetails" : {
            "discoveryFramework": {
                "questionText": "Was the card in your possession at the time of the
disputed transactions?"
            }
          }
        },
        {
          "DiscoveryFrameworkUsageType": "Default",
          "DesignerCustomizationType": "Discovery Framework",
          "Type": "Radio",
          "PropertySetConfig": {
            "label": "Was the card lost or stolen at the time of the disputed
transactions?",
            "defaultValue": null,
```

```
            "help": false,
            "helpText": "",
            "options": [
              {
                "name": "Yes",
                "developerName": "Yes",
                "value": "Yes",
                "setAll": false
              },
              {
                "name": "No",
                "developerName": "No",
                "value": "No",
                "setAll": false
              }
            ],
            "show": {
              "group": {
                "operator": "AND",
                "rules": [
                  {
                    "data": "Yes",
                    "condition": "=",
                    "field": "FSC_DM_v1_CardRelatedQ1"
                  }
                ]
              }
            },
            "conditionType": "Hide if False"
          },
          "ParentElementType": "Step",
          "ParentElementName": "Step1",
          "SequenceNumber": 1,
          "OmniProcessVersionNumber": 1,
          "Level": 1,
          "Description": null,
          "Name": "FSC_DM_v1_CardRelatedQ2",
          "elements": [],
          "customTypeDetails" : {
            "discoveryFramework": {
               "questionText": "Was the card lost or stolen at the time of the disputed
transactions?"
            }
          }
        },
        {
          "DiscoveryFrameworkUsageType": "Default",
          "DesignerCustomizationType": "Discovery Framework",
          "Type": "Radio",
          "PropertySetConfig": {
           "label": "Did you provide your card details on any unfamiliar or suspicious
websites?",
            "defaultValue": null,
            "help": false,
```

```
            "helpText": "",
            "options": [
              {
                "name": "Yes",
                "developerName": "Yes",
                "value": "Yes",
                "setAll": false
              },
              {
                "name": "No",
                "developerName": "No",
                "value": "No",
                "setAll": false
              }
            ],
            "show": null,
            "conditionType": "Hide if False"
          },
          "ParentElementType": "Step",
          "ParentElementName": "Step1",
          "SequenceNumber": 2,
          "OmniProcessVersionNumber": 1,
          "Level": 1,
          "Description": null,
          "Name": "FSC_DM_v1_FraudRelatedQ4",
          "elements": [],
          "customTypeDetails" : {
            "discoveryFramework": {
                "questionText": "Did you provide your card details on any unfamiliar or
suspicious websites?"
            }
          }
        }
      ]
    },
    {
      "DiscoveryFrameworkUsageType": "Default",
      "DesignerCustomizationType": "Discovery Framework",
      "Type": "Step",
      "PropertySetConfig": {
        "label": "Additional Details",
        "show": null,
        "conditionType": "Hide if False"
      },
      "ParentElementType": null,
      "ParentElementName": null,
      "SequenceNumber": 2,
      "OmniProcessVersionNumber": 1,
      "Level": 0,
      "Description": null,
      "Name": "Step2",
      "elements": [
        {
          "DiscoveryFrameworkUsageType": "Default",
```

```
          "DesignerCustomizationType": "Discovery Framework",
          "Type": "Text Area",
          "PropertySetConfig": {
            "label": "Can you provide more details about the transaction",
            "defaultValue": null,
            "help": false,
            "helpText": "",
            "show": null,
            "conditionType": "Hide if False"
          },
          "ParentElementType": "Step",
          "ParentElementName": "Step2",
          "SequenceNumber": 2,
          "OmniProcessVersionNumber": 1,
          "Level": 1,
          "Description": null,
          "Name": "FSC_DM_v1_AdditionalQ2",
          "elements": [],
          "customTypeDetails" : {
            "discoveryFramework": {
                "questionText": "Can you provide more details about the transaction"
            }
          }
        }
      ]
    }
  ]
```

Property Name	Type	Description	Filter Group and Version	Available Version
customTypeDetails	Custom Type Details[]	Custom type details for the Omniscript element.	Small, 60.0	60.0
description	String	Description of the Omniscript element.	Small, 60.0	60.0
designerCustomizationType	String	The customization type of the Omniscript element.	Small, 60.0	60.0
discoveryFrameworkUsageType	String	Discovery framework usage type of the Omniscript element.	Small, 60.0	60.0
elements	Omniscript Elements List[]	Elements within the Omniscript element.	Small, 60.0	60.0
level	String	Level of the Omniscript element.	Small, 60.0	60.0
name	String	Name of the Omniscript element.	Small, 60.0	60.0
omniProcessVersionNumber	String	OmniProcess version number of the Omniscript element.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
parentElementName	String	Parent element name of the Omniscript element.	Small, 60.0	60.0
parentElementType	String	Parent element type of the Omniscript element.	Small, 60.0	60.0
propertySetConfig	OS Element Property Set[]	Property set configuration of the Omniscript element.	Small, 60.0	60.0
sequenceNumber	String	Sequence number of the Omniscript element.	Small, 60.0	60.0
type	String	Type of the Omniscript element.	Small, 60.0	60.0

Omniscript Output

Output representation of the details of the Omniscript.

JSON example

```
{
  "DiscoveryFrameworkUsageType": "Default",
  "DesignerCustomizationType": "Discovery Framework",
  "VersionNumber": 1,
  "Type": "DiscoveryFramework",
  "Language": "English",
  "IsActive": false,
  "Description": null,
  "Name": "Dispute",
  "elements": [
    {
      "DiscoveryFrameworkUsageType": "Default",
      "DesignerCustomizationType": "Discovery Framework",
      "Type": "Step",
      "PropertySetConfig": {
        "label": "Card Details",
        "show": null,
        "conditionType": "Hide if False"
      },
      "ParentElementType": null,
      "ParentElementName": null,
      "SequenceNumber": 0,
      "OmniProcessVersionNumber": 1,
      "Level": 0,
      "Description": null,
      "Name": "Step1",
      "elements": [
        {
          "DiscoveryFrameworkUsageType": "Default",
          "DesignerCustomizationType": "Discovery Framework",
          "Type": "Radio",
```

```
          "PropertySetConfig": {
            "label": "Was the card in your possession at the time of the disputed
transactions?",
            "defaultValue": null,
            "help": false,
            "helpText": "",
            "options": [
              {
                "name": "Yes",
                "developerName": "Yes",
                "value": "Yes",
                "setAll": false
              },
              {
                "name": "No",
                "developerName": "No",
                "value": "No",
                "setAll": false
              }
            ],
            "show": null,
            "conditionType": "Hide if False"
          },
          "ParentElementType": "Step",
          "ParentElementName": "Step1",
          "SequenceNumber": 0,
          "OmniProcessVersionNumber": 1,
          "Level": 1,
          "Description": null,
          "Name": "FSC_DM_v1_CardRelatedQ1",
          "elements": [],
          "customTypeDetails" : {
            "discoveryFramework": {
                "questionText": "Was the card in your possession at the time of the
disputed transactions?"
            }
          }
        },
        {
          "DiscoveryFrameworkUsageType": "Default",
          "DesignerCustomizationType": "Discovery Framework",
          "Type": "Radio",
          "PropertySetConfig": {
            "label": "Was the card lost or stolen at the time of the disputed
transactions?",
            "defaultValue": null,
            "help": false,
            "helpText": "",
            "options": [
              {
                "name": "Yes",
                "developerName": "Yes",
                "value": "Yes",
                "setAll": false
```

```
              },
              {
                "name": "No",
                "developerName": "No",
                "value": "No",
                "setAll": false
              }
            ],
            "show": {
              "group": {
                "operator": "AND",
                "rules": [
                  {
                    "data": "Yes",
                    "condition": "=",
                    "field": "FSC_DM_v1_CardRelatedQ1"
                  }
                ]
              }
            },
            "conditionType": "Hide if False"
          },
          "ParentElementType": "Step",
          "ParentElementName": "Step1",
          "SequenceNumber": 1,
          "OmniProcessVersionNumber": 1,
          "Level": 1,
          "Description": null,
          "Name": "FSC_DM_v1_CardRelatedQ2",
          "elements": [],
          "customTypeDetails" : {
            "discoveryFramework": {
               "questionText": "Was the card lost or stolen at the time of the disputed
transactions?"
            }
          }
        },
        {
          "DiscoveryFrameworkUsageType": "Default",
          "DesignerCustomizationType": "Discovery Framework",
          "Type": "Radio",
          "PropertySetConfig": {
           "label": "Did you provide your card details on any unfamiliar or suspicious
websites?",
            "defaultValue": null,
            "help": false,
            "helpText": "",
            "options": [
              {
                "name": "Yes",
                "developerName": "Yes",
                "value": "Yes",
                "setAll": false
              },
```

```
              {
                "name": "No",
                "developerName": "No",
                "value": "No",
                "setAll": false
              }
            ],
            "show": null,
            "conditionType": "Hide if False"
          },
          "ParentElementType": "Step",
          "ParentElementName": "Step1",
          "SequenceNumber": 2,
          "OmniProcessVersionNumber": 1,
          "Level": 1,
          "Description": null,
          "Name": "FSC_DM_v1_FraudRelatedQ4",
          "elements": [],
          "customTypeDetails" : {
            "discoveryFramework": {
                "questionText": "Did you provide your card details on any unfamiliar or
suspicious websites?"
            }
          }
        }
      ]
    },
    {
      "DiscoveryFrameworkUsageType": "Default",
      "DesignerCustomizationType": "Discovery Framework",
      "Type": "Step",
      "PropertySetConfig": {
        "label": "Additional Details",
        "show": null,
        "conditionType": "Hide if False"
      },
      "ParentElementType": null,
      "ParentElementName": null,
      "SequenceNumber": 2,
      "OmniProcessVersionNumber": 1,
      "Level": 0,
      "Description": null,
      "Name": "Step2",
      "elements": [
        {
          "DiscoveryFrameworkUsageType": "Default",
          "DesignerCustomizationType": "Discovery Framework",
          "Type": "Text Area",
          "PropertySetConfig": {
            "label": "Can you provide more details about the transaction",
            "defaultValue": null,
            "help": false,
            "helpText": "",
            "show": null,
```

```
            "conditionType": "Hide if False"
          },
          "ParentElementType": "Step",
          "ParentElementName": "Step2",
          "SequenceNumber": 2,
          "OmniProcessVersionNumber": 1,
          "Level": 1,
          "Description": null,
          "Name": "FSC_DM_v1_AdditionalQ2",
          "elements": [],
          "customTypeDetails" : {
            "discoveryFramework": {
                "questionText": "Can you provide more details about the transaction"
            }
          }
        }
      ]
    }
  ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
additionalAttributes	additionalAttributes Output[]	Additional attributes of the Omniscript.	Small, 63.0	63.0
description	String	Description of the Omniscript.	Small, 60.0	60.0
designer Customization Type	String	Custom type of the Omniscript.	Small, 60.0	60.0
discovery FrameworkUsage Type	String	Usage type of the Omniscript.	Small, 60.0	60.0
elements	Omniscript Elements List[]	Element node of the Omniscript.	Small, 60.0	60.0
isActive	Boolean	Indicates if the Omniscript assessment is active (true) or not (false).	Small, 60.0	60.0
language	String	Language of the Omniscript.	Small, 60.0	60.0
lastModifiedDate	String	Date when the Omniscript was modified.	Small, 60.0	60.0
name	String	Name of the Omniscript.	Small, 60.0	60.0
omniprocessId	String	ID of the Omniscript associated with the assessment record.	Small, 60.0	60.0
subType	String	Subtype of the Omniscript.	Small, 60.0	60.0
type	String	Type of the Omniscript.	Small, 60.0	60.0

Property Name	Type	Description	Filter Group and Version	Available Version
versionNumber	String	Version of the Omniscript.	Small, 60.0	60.0
uniqueName	String	Unique name for the Omniscript.	Small, 60.0	60.0

Omniscript Element Discovery Framework Output

Output representation of the custom type details of the Omniscript elements for Discovery Framework.

JSON example

```
      "discoveryFramework": {
       "questionText": "Can you provide more details about the transaction"
    }
```

Property Name	Type	Description	Filter Group and Version	Available Version
description	String	Description of the question for the Discovery Framework question type element.	Small, 63.0	63.0
displayTextCategory	String	The category of the display text when the data type is Text Block. This field valued is returned for Health Cloud customers only.	Small, 63.0	63.0
question Category	String	Category of the question for the Discovery Framework question type element.	Small, 60.0	60.0
question DataType	String	Data type of the question for the Discovery Framework question type element.	Small, 60.0	60.0
question DeveloperName	String	Developer name of the question for the Discovery Framework question type element.	Small, 60.0	60.0
question Namespace	String	Namespace of the question for the Discovery Framework question type element.	Small, 60.0	60.0
questionText	String	Text of the question for the Discovery Framework question type element.	Small, 60.0	60.0

Omniscript Element Property Set Output

Output representation of the property set configuration of the Omniscript elements.

JSON example

```
     "PropertySetConfig": {
            "label": "Can you provide more details about the transaction",
            "defaultValue": null,
            "help": false,
```

```
            "helpText": "",
            "show": null,
            "conditionType": "Hide if False"
          }
```

Property Name	Type	Description	Filter Group and Version	Available Version
checkLabel	String	Label of the Omniscript element from the property set configuration.	Small, 60.0	60.0
conditionType	String	Condition type of the Omniscript element from the property set configuration.	Small, 60.0	60.0
dataType	String	Data type of the formula for the Omniscript element from the property set configuration.	Small, 60.0	60.0
dateFormat	String	Date format of the Omniscript element from the property set configuration.	Small, 60.0	60.0
expression	String	Formula expression of the Omniscript element from the property set configuration.	Small, 60.0	60.0
help	String	Help details of the Omniscript element from the property set configuration.	Small, 60.0	60.0
helpText	String	Help text of the Omniscript element from the property set configuration.	Small, 60.0	60.0
label	String	Label of the Omniscript element from the property set configuration.	Small, 60.0	60.0
options	List<Map<String, Object>>	Options of the Omniscript element from the property set configuration.	Small, 60.0	60.0
radioLabels	List<Map<String, Object>>	Radio labels of the Omniscript element from the property set configuration for the radio group child questions.	Small, 60.0	60.0
required	String	Specifies whether the Omniscript element is required to submit the form.	Small, 60.0	60.0
show	Map<String, Object>	Display field details for the conditional rendering of the Omniscript element from the property set configuration.	Small, 60.0	60.0
text	String	Text of the Omniscript element from the property set configuration.	Small, 60.0	60.0
type	String	Type of the Omniscript element from the property set configuration.	Small, 60.0	60.0

DiscoveryFramework_Prefill Integration Procedure

The DiscoveryFramework_Prefill Integration Procedure calls a Omnistudio Data Mapper and an Apex class. To customize the prefill flow, edit the steps of the DiscoveryFramework_Prefill Integration Procedure. Open the OmniStudio app, go to the Integration Procedures page, expand the DiscoveryFramework/Prefill Integration Procedure, and open the highest version.

Note: To ensure access to this Integration Procedure, see Security for Omnistudio Data Mappers and Integration Procedures.

EDITIONS

Available in: Lightning Experience in **Enterprise**, **Professional**, and **Unlimited** editions where a Financial Services Cloud Growth license is enabled or in **Enterprise** and **Unlimited** editions where the Health Cloud license is enabled.

Steps

Component Name	Type	What it does	What it calls
GetAssessmentId	Omnistudio Data Mapper Extract Action	Fetches the Id of the most recent Assessment record related to the specified ContextId, which is an AccountId.	GetAssessmentId Omnistudio Data Mapper Extract
GetAssessmentData	Remote Action	Fetches the Assessment record object.	DiscoveryFrmwkPreFlAssessment Apex class
AssessmentData	Response Action	Returns the Assessment record data to the entity that called this Integration Procedure.	Nothing

GetAssessmentId Omnistudio Data Mapper

The GetAssessmentId Omnistudio Data Mapper Extract fetches the ID of the most recent Assessment record related to the specified ContextId, which is an AccountId.

Settings

Tab	Setting	Value
Extract	Object	Assessment
Extract	Extract Output Path	Assessment
Extract	Filter	AccountId = ContextId ORDER BY LastModifiedDate DESC LIMIT 1
Output	Extract JSON Path	Assessment:Id
Output	Output JSON Path	RemoteActionAssessmentId

PreFillAssessment Apex Class

Use the PreFillAssessment class to fetch question and response data related to an Assessment object.

Namespace

DiscoveryFrmwrk

Usage

The PreFillAssessment class has two methods that do the same thing. The call method is necessary for the class to implement System.Callable.

Methods

- call(action, args)
- omniScriptPreFill(input, output)

call(action, args)

call(action, args)

The call method accepts an Assessment Id and passes question and response data to the AssessmentDataReturned output variable. It follows the syntax required for a class that implements System.Callable.

API Version

57.0

Required Chatter

No

Signature

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

Parameters

action

Type: `string`

Set the action value to omniScriptPreFill

args

Type: `Map<String,Object>`

The first two names in the name-value pairs must be input and output. The input must specify an Assessment Id. The output must be null. For example: `{"input": "0U3RO0000000Aai0AE", "output": null}`

Return Value

null

Usage

See the omniScriptPreFill method usage

omniScriptPreFill(input, output)

The omniScriptPreFill method accepts an Assessment Id and passes question and response data to the AssessmentDataReturned output variable.

API Version

57.0

Required Chatter

No

Signature

```
public static PreFillAssessment omniScriptPreFill(Map<String,Object> input,
Map<String,Object> output)
```

Parameters

input

Type: `Map<String,Object>`

Set the input parameter to {"input": "idString"}, where the idString is the Id of an Assessment object. For example: `{"input": "0U3RO0000000Aai0AE"}`

output

Type: `Map<String,Object>`

In the input, set the output parameter to `{"output": null}`.

Return Value

null

Usage

The data passed to the AssessmentDataReturned variable includes questions and their responses. The key for each question is the developer name of the question. For example:

```
{
  "AssessmentDataReturned": {
    "RespondentName": "Arthur, King of the Britons.",
    "RespondentGoal": "To seek the Holy Grail.",
    "SwallowAirspeed": "An African or European swallow?"
  }
}
```

CHAPTER 16 Engagement

In this chapter ...

- Engagement Data Model
- Engagement Connect APIs
- Apex Reference
- Integrate the Engagement Objects Into Your CTI System

Use the engagement objects to store details about an engagement between a customer and a customer service representative.

Engagement Data Model

The engagement data model stores details, such as start date and end date, time, topic, and attendees, about an interaction between a customer or a customer-authorized representative and a customer service representative (CSR) or contact center agent (CCA). You can add up to 50 custom fields each in the EngagementAttendee, EngagementInteraction, and EngagementTopic objects. The engagement objects also support quick actions that help CCAs to perform routine actions quickly without navigating to multiple pages. CCAs can also create personalized list views for engagement objects by using the My engagement attendees, My engagement interactions, and My engagement topics filters.

EngagementAttendee

Represents information about an attendee of an engagement. For example, when a customer initiates an engagement interaction by calling a service representative to inquire about an insurance claim, this object stores information about the customer and the service representative. This object is available in API version 55.0 and later

EngagementInteraction

Represents information about an interaction between a service representative or any other specialist in an organization and the organization's customer. Engagement interactions can be initiated through communication channels and can cover one or more topics. For example, a customer can initiate an engagement interaction by calling a service representative to inquire about an insurance claim. This object is available in API version 55.0 and later.

EngagementTopic

Represents information about the topics discussed by a customer and other attendees during an engagement. For example, when a customer initiates an engagement interaction by calling a service representative to inquire about an insurance claim, the topic of the engagement is Claim. This object is available in API version 55.0 and later.

SEE ALSO:

Create Object-Specific Quick Actions

Create a List View

EngagementAttendee

Represents information about an attendee of an engagement. For example, when a customer initiates an engagement interaction by calling a service representative to inquire about an insurance claim, this object stores information about the customer and the service representative. 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

Fields

Field	Details
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the engagement with the attendee ends.
`EngagementId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** Required. The engagement interaction, messaging session, or voice call that's related to the attendee. This field is a relationship field. **Relationship Name** Engagement **Relationship Type** Lookup **Refers To** EngagementInteraction, MessagingSession, VoiceCall
`ExternalAttendeeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The external user related to the engagement, such as the customer or partner. To avoid an error, either this field or the `InternalAttendeeId` field must have a value. This field is a polymorphic relationship field. A polymorphic field is one where the related object might be one of several different types of objects. For example, the Who relationship field of a Task can be a Contact or a Lead. **Relationship Name** ExternalAttendee **Relationship Type** Lookup

Field	Details
	Refers To Account, Contact, Lead
`InternalAttendeeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The internal user related to the engagement, such as the call center agent. To avoid an error, either this field or the ExternalAttendeeId field must have a value. This field is a relationship field. **Relationship Name** InternalAttendee **Relationship Type** Lookup **Refers To** User
`IsAuthenticated`	**Type** boolean **Properties** Create, Defaulted on Create, Filter, Group, Sort, Update **Description** Indicates whether the initiating attendee of the engagement interaction was authenticated through interactive voice response (IVR) or Web channel (`true`) or not (`false`). The default value is `false`. This field is available in API version 56.0 and later.
`IsVerified`	**Type** boolean **Properties** Create, Defaulted on Create, Filter, Group, Sort, Update **Description** Indicates whether the initiating attendee of the engagement interaction was verified (`true`) or not (`false`). The default value is `false`. This field is available in API version 56.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (`LastReferencedDate`) but not viewed it.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the Engagement Attendee record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The Salesforce ID of the person who owns this engagement attendee record. This field is a relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** User
`Role`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The role of an engagement attendee. This field is available in API version 56.0 and later. Possible values are:

Field	Details
	• `OnBehalf` • `Self`
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Required. The date and time when the engagement with the attendee starts.
`VerificationTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The time when the attendee was verified for the engagement interaction. This field is available in API version 56.0 and later.

Usage

This object is used in the Verify Customer Identity and the Verify Customer Identity Base Flow flow templates.

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.

EngagementAttendeeChangeEvent

EngagementAttendeeFeed

EngagementAttendeeHistory

EngagementInteraction

Represents information about an interaction between a service representative or any other specialist in an organization and the organization's customer. Engagement interactions can be initiated through communication channels and can cover one or more topics. For example, a customer can initiate an engagement interaction by calling a service representative to inquire about an insurance claim. 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

Fields

Field	Details
`AttendeeVerificationTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The time when the attendee was verified for the engagement interaction. You can manually set this time. If `isAttendeeVerified` is set to true, then if you don't manually set this time, it's set based on the current system date and time.
`CommunicationChannel`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Required. The communication channel through which engagement interaction occurs. Possible values are: • `In Person` • `Video Call` • `Voice Call` • `Web Chat` Your Salesforce admin can define new field values or update the existing field values.
`ContextId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the record that's considered as the context for the engagement interaction. For example, when a customer initiates an engagement interaction by booking a service appointment for an inquiry, the service appointment is the context for that engagement interaction. This field is a polymorphic relationship field. A polymorphic field is one where the related object can be one of several different types of objects. For example, the Who relationship field of a Task can be a Contact or a Lead. **Relationship Name** Context

Field	Details
	Relationship Type Lookup **Refers To** ServiceAppointment, Visit
`Duration`	**Type** string **Properties** Create, Filter, Nillable, Sort, Update **Description** Read-only. The duration of the engagement interaction based on the start date time and end date time. The duration is calculated when the end time is updated.
`EndDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** The date and time when the engagement interaction ends.
`ExternalIdentifier`	**Type** string **Properties** Create, Filter, Group, idLookup, Nillable, Sort, Update **Description** The unique external identifier of the engagement interaction.
`InitiatingAttendeeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The attendee who initiated the engagement interaction. This field is a polymorphic relationship field. A polymorphic field is one where the related object can be one of several different types of objects. For example, the Who relationship field of a Task can be a Contact or a Lead. **Relationship Name** InitiatingAttendee **Relationship Type** Lookup

Field	Details
	Refers To Account, Contact, Lead
`IsAttendeeAuthenticated`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the initiating attendee of the engagement interaction has been authenticated through IVR or Web channel (`true`) or not (`false`). The default value is `false`.
`IsAttendeeVerified`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the initiating attendee of the engagement interaction has been verified (`true`) or not (`false`). The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (`LastReferencedDate`) but not viewed it.
`MappedState`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort

Field	Details
	Description Specifies the state of the engagement interaction that changes when the status of the interaction gets updated. Possible values are: • `Completed` • `InProgress` • `New` The default value is `New`.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the Engagement Interaction record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The Salesforce ID of the person who owns this engagement interaction record. This field is a relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** User
`PhoneNumber`	**Type** phone **Properties** Create, Filter, Nillable, Sort, Update **Description** The phone number of the caller to get the context about the previous engagement interaction. This field is available in API version 57.0 and later.
`Reason`	**Type** string

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The reason for the engagement as stated by the customer or their representative during the engagement interaction. This field is available from API version 56.0 and later.
`RecordTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The identifier of the record type object. Available in API version 62.0 and later. **Relationship Name** RecordType **Refers To** RecordType
`Sentiment`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The analyzed sentiment of the engagement interaction attendee about the engagement interaction. Possible values are: • `Negative` • `Neutral` • `Positive` Your Salesforce admin can define new field values or update the existing field values.
`StartDateTime`	**Type** dateTime **Properties** Create, Filter, Nillable, Sort, Update **Description** Required. The date and time when the engagement interaction starts.
`Status`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update

Field	Details
	Description Specifies the status of the engagement interaction, which also impacts the interaction state. Possible values are: • `Completed` • `In Progress` • `New` Your Salesforce admin can define new field values or update the existing field values.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of interaction that was initiated by the attendee. Possible values are: • `Inbound` • `Outbound` Your Salesforce admin can define new field values or update the existing field values.

Usage

This object is used in the Verify Customer Identity and the Verify Customer Identity Base Flow flow templates.

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.

EngagementAttendeeChangeEvent

EngagementAttendeeFeed

EngagementAttendeeHistory

EngagementTopic

Represents information about the topics discussed by a customer and other attendees during an engagement. For example, when a customer initiates an engagement interaction by calling a service representative to inquire about an insurance claim, the topic of the engagement is Claim. 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

Fields

Field	Details
EngagementId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The engagement interaction, messaging session, or voice call record that's related to the topic discussed during the engagement. This field is a relationship field. **Relationship Name** Engagement **Relationship Type** Lookup **Refers To** EngagementInteraction, MessagingSession, VoiceCall
InteractionSummary	**Type** string **Properties** Create, Filter, Nillable, Sort, Update **Description** The summary of the engagement interaction. This field is available in API version 56.0 and later.
LastReferencedDate	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
LastViewedDate	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	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`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Required. The name of the engagement topic record.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The Salesforce ID of the person who owns this engagement topic record. This field is a relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** User
`ParentTopicId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The parent engagement topic record that's associated with this engagement topic. This field is a relationship field. **Relationship Name** ParentTopic **Relationship Type** Lookup **Refers To** EngagementTopic

Field	Details
`ProcessFailureReason`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the reason the process failed during the engagement interaction. The source is selected from a picklist of available values, which are set by your Salesforce administrator.
`ProcessName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the process executed during the engagement interaction.
`ProcessStatus`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the current status of the process that's executed during the engagement interaction. Possible values are: • `Cancelled` • `Completed` • `Failed` • `Initiated` Your Salesforce administrator can define new or update the existing field values.
`ProcessType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The type of the process executed during the engagement interaction. Possible values are: • `Flow` • `OmniScript` • `QuickAction`

Field	Details
RelatedPersonId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The person for whom the engagement interaction has been initiated. This field is a polymorphic relationship field. A polymorphic field is one where the related object might be one of several different types of objects. For example, the Who relationship field of a Task can be a Contact or a Lead. **Relationship Name** RelatedPerson **Relationship Type** Lookup **Refers To** Account, Contact, Lead
TopicId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The engagement topic record that's associated with the parent engagement topic. This field is a polymorphic relationship field. A polymorphic field is one where the related object might be one of several different types of objects. For example, the Who relationship field of a Task can be a Contact or a Lead. **Relationship Name** Topic **Relationship Type** Lookup **Refers To** Asset, Case, Claim, LoyaltyMemberTier, LoyaltyProgramMember, Opportunity, Order, ServiceAppointment, Voucher, TransactionJournal, and custom object

Usage

This object is used in the Verify Customer Identity and the Verify Customer Identity Base Flow flow templates.

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.

EngagementAttendeeChangeEvent

EngagementAttendeeFeed

EngagementAttendeeHistory

Engagement Connect APIs

With the Engagement Connect REST APIs, you can create, delete, and get Engagement Interaction, Engagement Attendee, and Engagement Topic records.

Engagement API Resources
Here's the list of Engagement API resources.

Engagement API Requests
Here's a list of Engagement API request bodies.

Engagement API Responses
Here's the list of Engagement API response bodies.

Engagement API Resources

Here's the list of Engagement API resources.

Engagement Interactions (POST)
Create engagement interaction, engagement attendee, and engagement topic records.

Engagement Interaction (DELETE, GET)
Resource for getting or deleting an engagement interaction record.

Engagement Interactions (POST)

Create engagement interaction, engagement attendee, and engagement topic records.

Resource

```
/connect/service-excellence/engagement-interactions
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/service-excellence/engagement-interactions
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

```
<engagementContainer>
```

JSON example

```
{
  "engagementInteraction": {
    "initiatingAttendeeId": "testattendeeid",
    "attendeeAuthenticated": true,
    "attendeeVerified": true,
    "startDateTime": "2022-04-17T12:00:00.000Z",
    "endDateTime": "2022-04-17T12:04:00.000Z",
    "communicationChannel": "Voice Call",
    "sentiment": "Positive",
    "contextId": "testcontextid",
    "externalIdentifierId": "external_identifier_id",
    "type": "Inbound",
    "mappedState": "New",
    "status": "New",
    "attendeeVerificationTime": "2022-04-17T12:02:00.000Z",
    "reason": "Unknown Charges",
    "phoneNumber": "9999999999",
    "customFieldsList": [
      {
        "key": "sampleLocation__c",
        "value": {
          "latitude": 12,
          "longitude": 17
        }
      },
      {
        "key": "sampleCheckbox__c",
        "value": "true"
      },
      {
        "key": "sampleDate__c",
        "value": "06/17/2022"
      },
      {
        "key": "sampleDateTime__c",
        "value": "2022-04-17T12:00:00.000Z"
      },
      {
        "key": "sampleEmail__c",
        "value": "sample@email.com"
      },
      {
        "key": "samplePercentage__c",
        "value": 17
      },
      {
        "key": "samplePicklist__c",
        "value": "pick1"
```

```
    }
  ],
  "engagementAttendees": [
    {
      "startDateTime": "2022-04-17T12:00:00.000Z",
      "endDateTime": "2022-04-17T12:04:00.000Z",
      "externalAttendeeId": "testattendeeid",
      "internalAttendeeId": "INTERNAL_ATTENDEE_ID",
      "role": "Self",
      "verificationTime": "2022-04-17T12:02:00.000Z",
      "isAuthenticated": true,
      "isVerified": true,
      "customFieldsList": [
        {
          "key": "sampleCheckBox__c",
          "value": true
        },
        {
          "key": "sampleDateTime__c",
          "value": "2022-04-17T12:00:00.000Z"
        },
        {
          "key": "sampleEmail__c",
          "value": "sample@email.com"
        },
        {
          "key": "sampleLocation__c",
          "value": {
            "latitude": 12,
            "longitude": 17
          }
        }
      ]
    }
  ],
  "engagementTopics": [
    {
      "topicId": "testtopicid",
      "relatedPersonId": "testrelatedpersonid",
      "name": "fee reversal",
      "parentTopicId": "testparenttopicid",
      "processName": "Card Fee Reversal",
      "processType": "Flow",
      "processStatus": "Completed",
      "interactionSummary": "Summary",
      "processFailureReason": "unknown",
      "customFieldsList": [
        {
          "key": "sampleCheckbox__c",
          "value": true
        },
        {
          "key": "sampleDate__c",
          "value": "06/17/2022"
```

```
            },
            {
              "key": "sampleDateTime__c",
              "value": "2022-04-17T12:00:00.000Z"
            },
            {
              "key": "sampleEmail__c",
              "value": "sample@email.com"
            },
            {
              "key": "sampleLocation__c",
              "value": {
                "latitude": 12,
                "longitude": 17
              }
            },
            {
              "key": "sampleNumber__c",
              "value": 1706
            },
            {
              "key": "samplePercentage__c",
              "value": 17
            },
            {
              "key": "samplePhoneNumber__c",
              "value": "1234567890"
            }
          ]
        }
      ]
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
engagementInteraction	Engagement Interaction Create Input	Create an engagement interaction record.	Required	55.0

Response body for POST

Engagement Interaction Create Output

Engagement Interaction (DELETE, GET)

Resource for getting or deleting an engagement interaction record.

Resource

```
/connect/service-excellence/engagement-interactions/${engagementInteractionId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/service-excellence/engagement-interactions/${engagementInteractionId}
```

Available version

55.0

Requires Chatter

No

HTTP methods

DELETE, GET

Response body for GET

Engagement Interaction Fetch Output

Engagement API Requests

Here's a list of Engagement API request bodies.

Custom Fields Input

Input representation for creating an engagement interaction, topic, or attendee record with a custom field.

Engagement Attendee Create Input

Input representation to create an engagement attendee record.

Engagement Interaction Create Input

Input representation to create an engagement interaction record.

Engagement Topic Create Input

Input representation to create an engagement topic record.

Engagements Create Input

Input representation of the engagements create request.

Custom Fields Input

Input representation for creating an engagement interaction, topic, or attendee record with a custom field.

Root XML tag

```
<customFields>
```

JSON example

```
{
  "customFieldsList": {
    "key": "sampledata",
    "value": "test"
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`key`	String	The name of a custom field in a Salesforce object.	Optional	56.0
`value`	Object	The value of a custom field in a Salesforce object.	Optional	56.0

Engagement Attendee Create Input

Input representation to create an engagement attendee record.

Root XML tag

```
<engagementAttendee>
```

JSON example

```
{
  "engagementAttendees": [
    {
      "startDateTime": "2022-04-17T12:00:00.000Z",
      "endDateTime": "2022-04-17T12:04:00.000Z",
      "externalAttendeeId": "TEST_EXTERNAL_ATTENDEE_ID",
      "internalAttendeeId": "TEST_INTERNAL_ATTENDEE_ID",
      "role": "Self",
      "verificationTime": "2022-04-17T12:02:00.000Z",
      "isAuthenticated": true,
      "isVerified": true,
      "customFieldsList": [
        {
          "key": "sampleCheckBox__c",
          "value": true
        },
        {
          "key": "sampleDateTime__c",
          "value": "2022-04-17T12:00:00.000Z"
        },
        {
          "key": "sampleEmail__c",
          "value": "sample@email.com"
        },
        {
          "key": "sampleLocation__c",
          "value": {
            "latitude": 12,
            "longitude": 17
          }
        }
      ]
    }
```

```
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
customFieldsList	Engagement Custom Fields Input[]	The custom fields and their values for engagement attendees.	Optional	56.0
endDateTime	String	The date and time when an engagement with an attendee ended.	Optional	55.0
engagementInteractionId	String	The ID of the associated engagement interaction record.	Required	55.0
externalAttendeeId	String	The external user related to an engagement, such as the customer or partner.	Optional	55.0
id	String	The ID of the engagement attendee record.	Required	55.0
internalAttendeeId	String	The internal user related to the engagement, such as the call center agent.	Optional	55.0
isAuthenticated	String	Indicates whether the initiating attendee of an engagement interaction was authenticated through IVR or Web channel (true) or not (false).	Required	55.0
isVerified	Boolean	Indicates whether the initiating attendee of the engagement interaction was verified (true) or not (false).	Required	55.0
ownerId	String	The Salesforce ID of the person who owns an engagement attendee record.	Required	55.0
role	String	The role of an engagement attendee.	Optional	55.0
startDateTime	String	The date and time when an engagement with an attendee started.	Required	55.0
verificationTime	String	The time when an attendee was verified for an engagement interaction.	Optional	55.0

Engagement Interaction Create Input

Input representation to create an engagement interaction record.

Root XML tag

```
<engagementInteraction>
```

JSON example


```
{
  "engagementInteraction": {
    "initiatingAttendeeId": "testattendeeid",
    "attendeeAuthenticated": true,
    "attendeeVerified": true,
    "startDateTime": "2022-04-17T12:00:00.000Z",
    "endDateTime": "2022-04-17T12:04:00.000Z",
    "communicationChannel": "Voice Call",
    "sentiment": "Test",
    "contextId": "TestContextId",
    "externalIdentifierId": "external_identifier_id",
    "type": "Inbound",
    "mappedState": "New",
    "status": "New",
    "attendeeVerificationTime": "2022-04-17T12:02:00.000Z",
    "reason": "Unknown Charges",
    "phoneNumber": "9999999999",
    "customFieldsList": [
      {
        "key": "sampleLocation__c",
        "value": {
          "latitude": 12,
          "longitude": 17
        }
      },
      {
        "key": "sampleCheckbox__c",
        "value": "true"
      },
      {
        "key": "sampleDate__c",
        "value": "06/17/2022"
      },
      {
        "key": "sampleDateTime__c",
        "value": "2022-04-17T12:00:00.000Z"
      },
      {
        "key": "sampleEmail__c",
        "value": "sample@email.com"
      },
      {
        "key": "samplePercentage__c",
        "value": 17
      },
      {
        "key": "samplePicklist__c",
        "value": "pick1"
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`attendeeAuthenticated`	Boolean	Indicates whether the initiating attendee of an engagement interaction was authenticated through interactive voice response (IVR) or Web channel (`true`) or not (`false`). The default value is `false`.	Optional	55.0
`attendeeVerificationTime`	String	The time when the attendee was verified for an engagement interaction. You can manually set this time. If `isAttendeeVerified` is set to true, then if you don't manually set this time, it is set based on the current system date and time.	Optional	55.0
`attendeeVerified`	Boolean	Indicates whether the initiating attendee of an engagement interaction was verified (true) or not (`false`).	Required	55.0
`communicationChannel`	String	The communication channel through which an engagement interaction occurred. Possible values are: • `In-Person` • `Video Call` • `Voice Call` • `Web Chat` You can set custom values.	Required	55.0
`contextId`	String	The ID of the record that's considered as the context for an engagement interaction. For example, when a customer initiates an engagement interaction by booking a service appointment for an inquiry, the service appointment is the context for that engagement interaction.	Optional	55.0
`customFieldsList`	Engagement Custom Fields Input[]	The custom fields and their values for engagement interactions.	Optional	56.0
`endDateTime`	String	The date and time when an engagement interaction ended.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
engagementAttendees	Engagement Attendee Create Input[]	Create engagement attendee records.	Optional	55.0
engagementTopics	Engagement Topic Create Input[]	Create engagement topic records.	Optional	55.0
externalIdentifierId	String	The unique external identifier of an engagement interaction.	Optional	55.0
id	String	The ID of an engagement interaction.	Required	55.0
initiatingAttendeeId	String	The attendee who has initiated the engagement interaction.	Optional	55.0
mappedState	String	The state of an engagement interaction that changes when the status of the interaction gets updated. Possible values are: • Completed • In Progress • New The default value is New.	Optional	55.0
phoneNumber	Phone	The phone number of the caller which is used to determine the context during a subsequent call.	Optional	57.0
reason	String	The reason for an engagement as stated by a customer during the engagement interaction.	Optional	55.0
sentiment	String	The sentiment of an engagement interaction attendee about the engagement interaction. Possible values are: • Negative • Neutral • Positive You can set custom values.	Optional	55.0
startDateTime	String	The date and time when an engagement interaction started.	Required	55.0
status	String	The current status of an engagement interaction, which also impacts the interaction state.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
`type`	String	The type of interaction that was initiated by the attendee. Possible values are: • `Inbound Interaction` • `Outbound Interaction` You can set custom values.	Optional	55.0

Engagement Topic Create Input

Input representation to create an engagement topic record.

Root XML tag

```
<engagementTopic>
```

JSON example

```
{
  "engagementTopics": {
    "topicId": "testTopicId",
    "relatedPersonId": "testRelatedPersonId",
    "name": "fee reversal",
    "parentTopicId": "testParentTopicId",
    "processName": "Card Fee Reversal",
    "processType": "Flow",
    "processStatus": "Completed",
    "interactionSummary": "Summary",
    "processFailureReason": "unknown",
    "customFieldsList": [
      {
        "key": "sampleCheckbox__c",
        "value": true
      },
      {
        "key": "sampleDate__c",
        "value": "06/17/2022"
      },
      {
        "key": "sampleDateTime__c",
        "value": "2022-04-17T12:00:00.000Z"
      },
      {
        "key": "sampleEmail__c",
        "value": "sample@email.com"
      },
      {
        "key": "sampleLocation__c",
        "value": {
          "latitude": 12,
          "longitude": 17
        }
```

```
      },
      {
        "key": "sampleNumber__c",
        "value": 1706
      },
      {
        "key": "samplePercentage__c",
        "value": 17
      },
      {
        "key": "samplePhoneNumber__c",
        "value": "1234567890"
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
customFieldsList	Engagement Custom Fields Input[]	The custom fields and their values for engagement topics.	Optional	56.0
engagementInteractionId	String	The ID of the engagement interaction record associated with an engagement topic record.	Required	55.0
id	String	The ID of an engagement topic record.	Required	55.0
interactionSummary	String	The summary of the engagement interaction.	Optional	55.0
name	String	The name of the engagement topic record.	Required	55.0
ownerId	String	The Salesforce ID of the person who owns this engagement topic record.	Required	55.0
parentTopicId	String	The parent engagement topic record that's associated with this engagement topic.	Optional	55.0
processFailureReason	String	The reason a process failed during an engagement interaction.	Optional	55.0
processName	String	The name of the process executed during an engagement interaction.	Optional	55.0
processStatus	String	The current status of a process that's executed during the engagement interaction. Possible values are: • Canceled • Completed	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
		• `Failed` • `Initiated`		
`processType`	String	The type of the process executed during the engagement interaction.	Optional	55.0
`relatedPersonId`	String	The person for whom an engagement interaction was initiated.	Optional	55.0
`topicId`	String	The engagement topic record that's associated with the parent engagement topic.	Optional	55.0

Engagements Create Input

Input representation of the engagements create request.

Root XML tag

```
<engagementContainer>
```

JSON example

```
{
  "engagementInteraction": {
    "initiatingAttendeeId": "testattendeeid",
    "attendeeAuthenticated": true,
    "attendeeVerified": true,
    "startDateTime": "2022-04-17T12:00:00.000Z",
    "endDateTime": "2022-04-17T12:04:00.000Z",
    "communicationChannel": "Voice Call",
    "sentiment": "Positive",
    "contextId": "testcontextid",
    "externalIdentifierId": "external_identifier_id",
    "type": "Inbound",
    "mappedState": "New",
    "status": "New",
    "attendeeVerificationTime": "2022-04-17T12:02:00.000Z",
    "reason": "Unknown Charges",
    "phoneNumber": "9999999999",
    "customFieldsList": [
      {
        "key": "sampleLocation__c",
        "value": {
          "latitude": 12,
          "longitude": 17
        }
      },
      {
        "key": "sampleCheckbox__c",
        "value": "true"
      },
```

```
      {
        "key": "sampleDate__c",
        "value": "06/17/2022"
      },
      {
        "key": "sampleDateTime__c",
        "value": "2022-04-17T12:00:00.000Z"
      },
      {
        "key": "sampleEmail__c",
        "value": "sample@email.com"
      },
      {
        "key": "samplePercentage__c",
        "value": 17
      },
      {
        "key": "samplePicklist__c",
        "value": "pick1"
      }
    ],
    "engagementAttendees": [
      {
        "startDateTime": "2022-04-17T12:00:00.000Z",
        "endDateTime": "2022-04-17T12:04:00.000Z",
        "externalAttendeeId": "testattendeeid",
        "internalAttendeeId": "INTERNAL_ATTENDEE_ID",
        "role": "Self",
        "verificationTime": "2022-04-17T12:02:00.000Z",
        "isAuthenticated": true,
        "isVerified": true,
        "customFieldsList": [
          {
            "key": "sampleCheckBox__c",
            "value": true
          },
          {
            "key": "sampleDateTime__c",
            "value": "2022-04-17T12:00:00.000Z"
          },
          {
            "key": "sampleEmail__c",
            "value": "sample@email.com"
          },
          {
            "key": "sampleLocation__c",
            "value": {
              "latitude": 12,
              "longitude": 17
            }
          }
        ]
      }
    ],
```

```
    "engagementTopics": [
      {
        "topicId": "testtopicid",
        "relatedPersonId": "testrelatedpersonid",
        "name": "fee reversal",
        "parentTopicId": "testparenttopicid",
        "processName": "Card Fee Reversal",
        "processType": "Flow",
        "processStatus": "Completed",
        "interactionSummary": "Summary",
        "processFailureReason": "unknown",
        "customFieldsList": [
          {
            "key": "sampleCheckbox__c",
            "value": true
          },
          {
            "key": "sampleDate__c",
            "value": "06/17/2022"
          },
          {
            "key": "sampleDateTime__c",
            "value": "2022-04-17T12:00:00.000Z"
          },
          {
            "key": "sampleEmail__c",
            "value": "sample@email.com"
          },
          {
            "key": "sampleLocation__c",
            "value": {
              "latitude": 12,
              "longitude": 17
            }
          },
          {
            "key": "sampleNumber__c",
            "value": 1706
          },
          {
            "key": "samplePercentage__c",
            "value": 17
          },
          {
            "key": "samplePhoneNumber__c",
            "value": "1234567890"
          }
        ]
      }
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
engagementInteraction	Engagement Interaction Create Input	Create an engagement interaction record.	Required	55.0

Engagement API Responses

Here's the list of Engagement API response bodies.

Custom Field Output
Output representation for creating an engagement interaction, topic, or attendee record with a custom field.

Engagement Attendee Output
Output representation to create an engagement attendee record.

Engagement Interaction Create Output
Output representation for creating an engagement interaction record.

Engagement Interaction Fetch Output
Output representation to fetch an engagement interaction record along with the status.

Engagement Interaction IDs Create Output
Output representation of creating an engagement interaction.

Engagement Interaction Output
Output representation to fetch an engagement interaction record.

Engagement Topic Output
Output representation to create an engagement topic record.

Engagements ID Output
Output representation of IDs for the engagement interaction, engagement attendee, and engagement topic records.

Engagement Status Output
Output representation to display the status of an API request.

Custom Field Output

Output representation for creating an engagement interaction, topic, or attendee record with a custom field.

Property Name	Type	Description	Filter Group and Version	Available Version
key	String	The name of a custom field from a Salesforce object.	Small, 56.0	56.0
value	Object	The value of a custom field from a Salesforce object.	Small, 56.0	56.0

Engagement Attendee Output

Output representation to create an engagement attendee record.

Property Name	Type	Description	Filter Group and Version	Available Version
customFields	Engagement Custom Fields Output	The list of custom fields.	Small, 56.0	56.0
endDateTime	String	The end date and time of an engagement interaction.	Small, 55.0	55.0
engagementInteractionId	String	The ID of the engagement interaction associated with an engagement attendee record.	Small, 55.0	55.0
externalAttendeeId	String	The external attendee ID.	Small, 55.0	55.0
id	String	The engagement attendee record ID.	Small, 55.0	55.0
internalAttendeeId	String	The internal attendee ID.	Small, 55.0	55.0
isAuthenticated	Boolean	The value of the IsAuthenticated field for an EngagementAttendee.	Small, 55.0	55.0
isVerified	Boolean	The value of the IsVerified field for an EngagementAttendee.	Small, 55.0	55.0
ownerId	String	The Salesforce ID of the person who owns the engagement attendee record.	Small, 55.0	55.0
role	String	The role of the EngagementAttendee.	Small, 55.0	55.0
startDateTime	String	The start date and time of an engagement interaction.	Small, 55.0	55.0
verificationTime	String	The value of the VerificationTime field for an EngagementAttendee.	Small, 55.0	55.0

Engagement Interaction Create Output

Output representation for creating an engagement interaction record.

Property Name	Type	Description	Filter Group and Version	Available Version
engagementInteraction	Engagements ID Create Output	Details about the engagement interaction, the engagement attendee, and the engagement topic.	Small, 55.0	55.0
status	Engagement Status Output	Status of an engagement interaction create request.	Small, 55.0	55.0

Engagement Interaction Fetch Output

Output representation to fetch an engagement interaction record along with the status.

Property Name	Type	Description	Filter Group and Version	Available Version
engagementInteraction	Engagement Interaction Details Output	The details of an engagement interaction.	Small, 55.0	55.0
status	Engagement Status Output	The status of an engagement.	Small, 55.0	55.0

Engagement Interaction IDs Create Output

Output representation of creating an engagement interaction.

Property Name	Type	Description	Filter Group and Version	Available Version
engagementAttendees	Engagements ID Output[]	The engagement attendee details.	Small, 55.0	55.0
engagementTopics	Engagements ID Output[]	The engagement topic details.	Small, 55.0	55.0
id	String	The ID of the engagement interaction record.	Small, 55.0	55.0

Engagement Interaction Output

Output representation to fetch an engagement interaction record.

Property Name	Type	Description	Filter Group and Version	Available Version
attendeeAuthenticated	Boolean	Checks if the initiating attendee is authenticated.	Small, 55.0	55.0
attendeeVerificationTime	String	The attendee verification time.	Small, 55.0	55.0
attendeeVerified	Boolean	Checks if the initiating attendee is verified.	Small, 55.0	55.0
communicationChannel	String	The communication channel for an engagement interaction.	Small, 55.0	55.0
contextId	String	The context ID for an engagement interaction.	Small, 55.0	55.0
customFields	Engagement Custom Fields Output	The list of custom fields.	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
duration	String	The duration of an engagement interaction.	Small, 55.0	55.0
endDateTime	String	The end date and time of an engagement interaction.	Small, 55.0	55.0
engagementAttendees	Engagement Attendee Details Output[]	The engagement attendee details.	Small, 55.0	55.0
engagementTopics	Engagement Topic Output[]	The engagement topic details.	Small, 55.0	55.0
externalIdentifierId	String	The external identifier ID of an engagement interaction.	Small, 55.0	55.0
id	String	The engagement interaction ID.	Small, 55.0	55.0
initiatingAttendeeId	String	The initiating attendee ID.	Small, 55.0	55.0
mappedState	String	The mapped state for an engagement interaction.	Small, 55.0	55.0
ownerId	String	The owner ID of an engagement interaction.	Small, 55.0	55.0
phoneNumber	String	The phone number of the caller. Note: The phone number is used to get the context of the previous engagement.	Small, 57.0	57.0
reason	String	The reason of the engagement interaction.	Small, 55.0	55.0
sentiment	String	The sentiment of an initiating attendee.	Small, 55.0	55.0
startDateTime	String	The start date and time of an engagement interaction.	Small, 55.0	55.0
status	String	The status of an engagement interaction.	Small, 55.0	55.0
type	String	The type of an engagement interaction.	Small, 55.0	55.0

Engagement Topic Output

Output representation to create an engagement topic record.

Property Name	Type	Description	Filter Group and Version	Available Version
customFields	Engagement Custom Fields Output	The list of custom fields.	Small, 56.0	56.0
engagementInteractionId	String	The ID of the associated engagement interaction record.	Small, 55.0	55.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	The engagement topic record ID.	Small, 55.0	55.0
interactionSummary	String	The interaction summary of the EngagementTopic.	Small, 55.0	55.0
name	String	The engagement topic record name.	Small, 55.0	55.0
ownerId	String	The Salesforce ID of the person who owns the engagement topic record.	Small, 55.0	55.0
parentTopicId	String	The parent engagement topic record ID.	Small, 55.0	55.0
processFailureReason	String	The process failure reason.	Small, 55.0	55.0
processName	String	The name of the process executed during an engagement interaction.	Small, 55.0	55.0
processStatus	String	The process status.	Small, 55.0	55.0
processType	String	The process type.	Small, 55.0	55.0
relatedPersonId	String	The related person ID.	Small, 55.0	55.0
topicId	String	The engagement topic record ID that's associated with the parent engagement topic record.	Small, 55.0	55.0

Engagements ID Output

Output representation of IDs for the engagement interaction, engagement attendee, and engagement topic records.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	The ID of the engagement attendee or engagement topic record.	Small, 55.0	55.0

Engagement Status Output

Output representation to display the status of an API request.

Property Name	Type	Description	Filter Group and Version	Available Version
code	Integer	The API request status code.	Small, 55.0	55.0
message	String	The API request status message.	Small, 55.0	55.0

Apex Reference

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

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

ConnectApi Namespace

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

DataRetrieval Namespace

The `DataRetrieval` namespace provides classes to store the record details and conversation transcripts between customers and agents.

`ConnectApi` Namespace

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

For information about working with the `ConnectApi` classes, see Connect in Apex.

EngagementContainerConnect Methods

These are the methods for `EngagementContainerConnect`. Methods are static.

Input Classes

These are Engagements Apex input classes.

Output Classes

These are the Engagements Apex output classes.

EngagementContainerConnect Methods

These are the methods for `EngagementContainerConnect`. Methods are static.

deleteEngagements(engagementInteractionId)

Delete an engagement interaction record.

fetchEngagements(engagementInteractionId)

Get an engagement interaction record.

createEngagementInteraction(engagementContainerInput)

Create an engagement interaction record.

`deleteEngagements(engagementInteractionId)`

Delete an engagement interaction record.

API Version

55.0

Requires Chatter

No

Signature

```
public static Void deleteEngagements(String engagementInteractionId)
```

Parameters

engagementInteractionId
Type: String

The unique external identifier of an engagement interaction.

Return Value

Type: Void

Example

```
ConnectApi.EngagementContainerConnect.deleteEngagements('<EngagementInteractionId>');
```

fetchEngagements(engagementInteractionId)

Get an engagement interaction record.

API Version

55.0

Requires Chatter

No

Signature

```
public static ConnectApi.EngagementInteractionFetchOutput fetchEngagements(String
engagementInteractionId)
```

Parameters

engagementInteractionId
Type: String

The unique external identifier of an engagement interaction.Description

Return Value

Type: `ConnectApi.EngagementInteractionFetchOutput`

Example

```
ConnectApi.EngagementInteractionFetchOutput  output =
ConnectApi.EngagementContainerConnect.fetchEngagements('<EngagementInteractionId>');
```

`createEngagementInteraction(engagementContainerInput)`

Create an engagement interaction record.

API Version

55.0

Requires Chatter

No

Signature

```
public static ConnectApi.EngagementsCreateOutput
createEngagementInteraction(ConnectApi.EngagementsCreateInput engagementContainerInput)
```

Parameters

engagementContainerInput

Type: `ConnectApi.EngagementsCreateInput`

Input representation of the engagements create request.

Return Value

Type: `ConnectApi.EngagementsCreateOutput`

Example

```
Account initiatingUserAccount = new Account(Name='Test');
insert initiatingUserAccount;
ConnectApi.EngagementInteractionCreateInput interactionInput = new
ConnectApi.EngagementInteractionCreateInput();
interactionInput.communicationChannel = 'Video Call';
interactionInput.attendeeAuthenticated = true;
interactionInput.attendeeVerified = false;
interactionInput.sentiment = 'Positive';
interactionInput.startDateTime =
datetime.now().formatGMT('yyyy-MM-dd\'T\'HH:mm:ss.SSS\'Z\'');
interactionInput.endDateTime = datetime.now().formatGMT('yyyy-MM-dd\'T\'HH:mm:ss.SSS\'Z\'');
interactionInput.status = 'New';
interactionInput.initiatingAttendeeId = initiatingUserAccount.id;
interactionInput.attendeeAuthenticated = true;
interactionInput.type = 'Inbound';
interactionInput.status = 'New';
interactionInput.attendeeVerificationTime =
datetime.now().formatGMT('yyyy-MM-dd\'T\'HH:mm:ss.SSS\'Z\'');
```

```
interactionInput.reason = 'Unknown Charges';
interactionInput.phoneNumber = '9999999999';
ConnectApi.EngagementsCreateInput containerInput = new ConnectApi.EngagementsCreateInput();
containerInput.engagementInteraction = interactionInput;
ConnectApi.EngagementsCreateOutput output =
ConnectApi.EngagementContainerConnect.createEngagementInteraction(containerInput);
```

Input Classes

These are Engagements Apex input classes.

ConnectApi.EngagementCustomFieldsInput
Input representation for creating an engagement interaction, topic, or attendee record with a custom field.

ConnectApi.EngagementCustomFieldsInput

Input representation for creating an engagement interaction, topic, or attendee record with a custom field.

Property	Type	Description	Required or Optional	Available Version
`key`	String	The name of a custom field in a Salesforce object.	Optional	56.0
`value`	`Object`	The value of a custom field in a Salesforce object.	Optional	56.0

ConnectApi.EngagementAttendeeCreateInput
Input representation to create an engagement attendee record.

ConnectApi.EngagementInteractionCreateInput
Input representation to create an engagement interaction record.

ConnectApi.EngagementTopicCreateInput
Input representation to create an engagement topic record.

ConnectApi.EngagementsCreateInput
Input representation of the engagements create request.

ConnectApi.EngagementAttendeeCreateInput

Input representation to create an engagement attendee record.

Property	Type	Description	Required or Optional	Available Version
`customFieldsList`	`List<ConnectApi.EngagementCustomFieldsInput>`	The custom fields and their values for engagement attendees.	Optional	56.0
`endDateTime`	String	The date and time when the engagement with the attendee ends.	Optional	55.0

Property	Type	Description	Required or Optional	Available Version
engagementInteractionId	String	The Engagement Interaction ID related to the attendee.		55.0
externalAttendeeId	String	The external user related to the engagement, such as the customer or partner. To avoid an error, either this field or the `InternalAttendeeId` field must have a value. The value must be an account, contact, or lead.		55.0
id	String	The ID field for an EngagementAttendee record.	Required	55.0
internalAttendeeId	String	The internal user related to the engagement, such as the call center agent. To avoid an error, either this field or the `ExternalAttendeeId` field must have a value. The value must be a user.		55.0
isAuthenticated	Boolean	Indicates whether the initiating attendee of the engagement interaction was authenticated through interactive voice response (IVR) or Web channel (`true`) or not (`false`). The default value is `false`.		55.0
isVerified	Boolean	Indicates whether the initiating attendee of the engagement interaction was verified (`true`) or not (`false`). The default value is `false`.		55.0
ownerId	String	The Salesforce ID of the person who owns this engagement attendee record.		55.0
role	String	The role of an engagement attendee. The possible values are: • `OnBehalf` • `Self`		56.0
startDateTime	String	The date and time when the engagement with the attendee starts.	Required	55.0
verificationTime	String	The time when the attendee was verified for the engagement interaction.		55.0

ConnectApi.EngagementInteractionCreateInput

Input representation to create an engagement interaction record.

Property	Type	Description	Required or Optional	Available Version
attendeeAuthenticated	Boolean	Indicates whether the initiating attendee of an engagement interaction was authenticated through interactive voice response (IVR) or Web channel (`true`) or not (`false`). The default value is `false`.	Optional	55.0
attendeeVerificationTime	String	The time when the attendee was verified for an engagement interaction. You can manually set this time. If `isAttendeeVerified` is set to true, then if you don't manually set this time, it is set based on the current system date and time.	Optional	55.0
attendeeVerified	Boolean	Indicates whether the initiating attendee of an engagement interaction was verified (true) or not (`false`).	Required	55.0
communicationChannel	String	The communication channel through which an engagement interaction occurred. Possible values are: • `In Person` • `Video Call` • `Voice Call` • `Web Chat` You can set custom values.	Required	55.0
contextId	String	The ID of the record that's considered as the context for an engagement interaction. For example, when a customer initiates an engagement interaction by booking a service appointment for an inquiry, the service appointment is the context for that engagement interaction.	Optional	55.0
customFieldsList	List<ConnectApi.EngagementCustomFieldInput>	The custom fields and their values for engagement interactions.	Optional	56.0
endDateTime	String	The date and time when an engagement interaction ended.	Optional	55.0
engagementAttendees	List<ConnectApi.EngagementAttendeeInput>	Create engagement attendee records.		55.0
engagementTopics	List<ConnectApi.EngagementTopicInput>	Create engagement topic records.		55.0
externalIdentifierId	String	The unique external identifier of an engagement interaction.	Optional	55.0

Property	Type	Description	Required or Optional	Available Version
`id`	String	The ID of an engagement interaction.	Required	55.0
`initiatingAttendeeId`	String	The attendee who has initiated the engagement interaction.	Optional	55.0
`mappedState`	String	The state of an engagement interaction that changes when the status of the interaction gets updated. Possible values are: • `Completed` • `In Progress` • `New` The default value is `New`.	Optional	55.0
`phoneNumber`	String	The phone number of the caller who initiates an engagement interaction. Note: The phone number is used to get the context of the previous engagement.	Optional	57.0
`reason`	String	The reason for an engagement as stated by a customer during the engagement interaction.	Optional	56.0
`sentiment`	String	The sentiment of an engagement interaction attendee about the engagement interaction. Possible values are: • `Negative` • `Neutral` • `Positive` You can set custom values.	Optional	55.0
`startDateTime`	String	The date and time when an engagement interaction started.	Required	55.0
`status`	String	The current status of an engagement interaction, which also impacts the interaction state.	Optional	55.0
`type`	String	The type of interaction that was initiated by the attendee. Possible values are: • `Inbound Interaction` • `Outbound Interaction` You can set custom values.	Optional	55.0

ConnectApi.EngagementTopicCreateInput

Input representation to create an engagement topic record.

Property	Type	Description	Required or Optional	Available Version
`customFieldsList`	List<ConnectApi.EngagementCustomFieldInput>	The custom fields and their values for engagement topics.	Optional	56.0
`engagementInteractionId`	String	The ID of the engagement interaction record associated with an engagement topic record.	Required	55.0
`id`	String	The ID of an engagement topic record.	Required	55.0
`interactionSummary`	String	The summary of the engagement interaction.	Optional	55.0
`name`	String	The name of the engagement topic record.	Required	55.0
`ownerId`	String	The Salesforce ID of the person who owns this engagement topic record.	Required	55.0
`parentTopicId`	String	The parent engagement topic record that's associated with this engagement topic.	Optional	55.0
`processFailureReason`	String	The reason a process failed during an engagement interaction.	Optional	55.0
`processName`	String	The name of the process executed during an engagement interaction.	Optional	55.0
`processStatus`	String	The current status of a process that's executed during the engagement interaction. Possible values are: • `Canceled` • `Completed` • `Failed` • `Initiated`	Optional	55.0
`processType`	String	The type of the process executed during the engagement interaction.	Optional	55.0
`relatedPersonId`	String	The person for whom an engagement interaction was initiated.	Optional	55.0
`topicId`	String	The engagement topic record that's associated with the parent engagement topic.	Optional	55.0

ConnectApi.EngagementsCreateInput

Input representation of the engagements create request.

Property	Type	Description	Required or Optional	Available Version
engagementInteraction	EngagementInteractionCreateInputRepresentation	Create an engagement interaction record.	Required	55.0

Output Classes

These are the Engagements Apex output classes.

ConnectApi.EngagementCustomFieldsOutput
Output representation for creating an engagement interaction, topic, or attendee record with a custom field.

ConnectApi.EngagementAttendeeDetailsOutput
Output representation to create an engagement attendee record.

ConnectApi.EngagementsCreateOutput
Output representation to create an engagement record along with the status.

ConnectApi.EngagementInteractionFetchOutput
Output representation to fetch an engagement interaction record along with the status.

ConnectApi.EngagementsIdCreateOutput
Output representation to create an engagement interaction.

ConnectApi.EngagementInteractionDetailsOutput
Output representation to fetch an engagement interaction record.

ConnectApi.EngagementTopicCreateInput
Input representation to create an engagement topic record.

ConnectApi.EngagementTopicOutput
Output representation to create an engagement topic record.

ConnectApi.EngagementsIdOutput
Output representation of IDs for the engagement interaction, engagement attendee, and engagement topic records.

ConnectApi.EngagementStatusOutput
Output representation to display the status of an API request.

ConnectApi.EngagementCustomFieldsOutput

Output representation for creating an engagement interaction, topic, or attendee record with a custom field.

Property Name	Type	Description	Available Version
key	String	The name of a custom field from a Salesforce object.	56.0
value	Object	The value of a custom field from a Salesforce object.	56.0

ConnectApi.EngagementAttendeeDetailsOutput

Output representation to create an engagement attendee record.

Property Name	Type	Description	Available Version
customFields	List<ConnectApi.EngagementCustomFieldOutput>	The list of custom fields.	56.0
endDateTime	String	The end date and time of an engagement interaction.	55.0
engagementInteractionId	String	The ID of the engagement interaction associated with an engagement attendee record.	55.0
externalAttendeeId	String	The external attendee ID.	55.0
id	String	The engagement attendee record ID.	55.0
internalAttendeeId	String	The internal attendee ID.	55.0
isAuthenticated	Boolean	The value of the IsAuthenticated field for an EngagementAttendee.	56.0
isVerified	Boolean	The value of the IsVerified field for an EngagementAttendee.	56.0
ownerId	String	The Salesforce ID of the person who owns the engagement attendee record.	55.0
role	String	The role of the EngagementAttendee.	56.0
startDateTime	String	The start date and time of an engagement interaction.	55.0
verificationTime	String	The value of the VerificationTime field for an EngagementAttendee.	56.0

ConnectApi.EngagementsCreateOutput

Output representation to create an engagement record along with the status.

Property Name	Type	Description	Available Version
engagementInteraction	ConnectApi.EngagementsCreateOutput	Details about the engagement interaction, the engagement attendee, and the engagement topic.	55.0
status	ConnectApi.EngagementStatusOutput	Status of an engagement interaction create request.	55.0

ConnectApi.EngagementInteractionFetchOutput

Output representation to fetch an engagement interaction record along with the status.

Property Name	Type	Description	Available Version
engagementInteraction	ConnectApi.EngagementInteractionDetailOutput	The details of an engagement interaction.	55.0
status	ConnectApi.EngagementStatusOutput	The status of an engagement.	55.0

ConnectApi.EngagementsIdCreateOutput

Output representation to create an engagement interaction.

Property Name	Type	Description	Available Version
engagementAttendees	List<ConnectApi.EngagementIdOutput>	The engagement attendee details.	55.0
engagementTopics	List<ConnectApi.EngagementIdOutput>	The engagement topic details.	55.0
id	String	ID of the engagement interaction record.	55.0

ConnectApi.EngagementInteractionDetailsOutput

Output representation to fetch an engagement interaction record.

Property Name	Type	Description	Available Version
attendeeAuthenticated	Boolean	Checks if the initiating attendee is authenticated.	55.0
attendeeVerificationTime	String	The attendee verification time.	55.0
attendeeVerified	Boolean	Checks if the initiating attendee is verified.	55.0
communicationChannel	String	The communication channel for an engagement interaction.	55.0
contextId	String	The context ID for an engagement interaction.	55.0
customFields	List<ConnectApi.EngagementCustomFieldOutput>	The list of custom fields.	56.0
duration	String	The duration of an engagement interaction.	55.0
endDateTime	String	The end date and time of an engagement interaction.	55.0
engagementAttendees	List<ConnectApi.EngagementAttendeeDetailOutput>	The engagement attendee details.	55.0
engagementTopics	List<ConnectApi.EngagementTopicOutput>	The engagement topic details.	55.0
externalIdentifierId	String	The external identifier ID of an engagement interaction.	55.0
id	String	The engagement interaction ID.	55.0
initiatingAttendeeId	String	The initiating attendee ID.	55.0
mappedState	String	The mapped state for an engagement interaction.	55.0
ownerId	String	The owner ID of an engagement interaction.	55.0
phoneNumber	String	The phone number of the caller who initiates an engagement interaction. Note: The phone number is used to get the context of the previous engagement.	57.0
reason	String	The reason of the EngagementInteraction.	56.0

Property Name	Type	Description	Available Version
sentiment	String	The sentiment of an initiating attendee.	55.0
startDateTime	String	The start date and time of an engagement interaction.	55.0
status	String	The status of an engagement interaction.	55.0
type	String	The type of an engagement interaction.	55.0

ConnectApi.EngagementTopicCreateInput

Input representation to create an engagement topic record.

Property	Type	Description	Required or Optional	Available Version
customFieldsList	List<ConnectApi.EngagementCustomFieldInput>	The custom fields and their values for engagement topics.	Optional	56.0
engagementInteractionId	String	The ID of the engagement interaction record associated with an engagement topic record.	Required	55.0
id	String	The ID of an engagement topic record.	Required	55.0
interactionSummary	String	The summary of the engagement interaction.	Optional	55.0
name	String	The name of the engagement topic record.	Required	55.0
ownerId	String	The Salesforce ID of the person who owns this engagement topic record.	Required	55.0
parentTopicId	String	The parent engagement topic record that's associated with this engagement topic.	Optional	55.0
processFailureReason	String	Specifies the reason a process failed during an engagement interaction.	Optional	55.0
processName	String	The name of the process executed during an engagement interaction.	Optional	55.0
processStatus	String	Specifies the current status of a process that's executed during the engagement interaction. Possible values are: • Canceled • Completed • Failed • Initiated	Optional	55.0

Property	Type	Description	Required or Optional	Available Version
processType	String	The type of the process executed during the engagement interaction.	Optional	55.0
relatedPersonId	String	The person for whom an engagement interaction was initiated.	Optional	55.0
topicId	String	The engagement topic record that's associated with the parent engagement topic.	Optional	55.0

ConnectApi.EngagementTopicOutput

Output representation to create an engagement topic record.

Property Name	Type	Description	Available Version
customFields	List<ConnectApi.EngagementCustomFieldOutput>	The list of custom fields.	56.0
engagementInteractionId	String	The ID of the associated engagement interaction record.	55.0
id	String	The engagement topic record ID.	55.0
interactionSummary	String	The interaction summary of the EngagementTopic.	56.0
name	String	The engagement topic record name.	55.0
ownerId	String	The Salesforce ID of the person who owns the engagement topic record.	55.0
parentTopicId	String	The parent engagement topic record ID.	55.0
processFailureReason	String	The process failure reason.	55.0
processName	String	The name of the process executed during an engagement interaction.	55.0
processStatus	String	The process status.	55.0
processType	String	The process type.	55.0
relatedPersonId	String	The related person ID.	55.0
topicId	String	The engagement topic record ID that's associated with the parent engagement topic record.	55.0

ConnectApi.EngagementsIdOutput

Output representation of IDs for the engagement interaction, engagement attendee, and engagement topic records.

Property Name	Type	Description	Available Version
`id`	String	The ID of the engagement attendee or engagement topic record.	55.0

ConnectApi.EngagementStatusOutput

Output representation to display the status of an API request.

Property Name	Type	Description	Available Version
`code`	Integer	The API request status code.	55.0
`message`	String	The API request status message.	55.0

DataRetrieval Namespace

The `DataRetrieval` namespace provides classes to store the record details and conversation transcripts between customers and agents.

The `DataRetrieval` namespace includes these classes.

Engagement Class
Stores the object name and ID of an engagement record. An engagement record represents an engagement interaction, a messaging session, or a voice call between a customer and an agent.

Engagements Class
Stores the a list of `DataRetrieval.Engagement` records.

EngagementRecordDetails Class
Stores the details of the conversation between a customer and an agent, including engagement record ID, start time, end time, and conversation identifier.

EngagementRecordDetailsList Class
Stores the `DataRetrieval.EngagementRecordDetails` records.

ObjectDetailsRepresentation Class
Stores the details of an object and its associated records so that you can use the data for object summarization.

RecordDetailsRepresentation Class
Stores the details of an individual record, including its associated field data.

FieldDetailsRepresentation Class
Stores the field names and their values associated with a record, which can later be used for various operations or data processing tasks.

RecordTranscripts Class
Stores the transcripts of a single interaction session record, such as a messaging session or a voice call.

RecordTranscriptsList Class
Stores the transcripts from multiple interaction sessions between customers and agents.

Transcript Class
Stores the conversation between customers and agents in written format, specifying the roles of the participants and their messages.

Engagement Class

Stores the object name and ID of an engagement record. An engagement record represents an engagement interaction, a messaging session, or a voice call between a customer and an agent.

Namespace

DataRetrieval

Engagement Constructors

Use the `Engagement` constructor to initialize the `Engagement` class that associates an engagement record ID with the API name of the engagement object.

SEE ALSO:

https://help.salesforce.com/s/articleView?id=sf.engagement.htm

Engagement Constructors

Use the `Engagement` constructor to initialize the `Engagement` class that associates an engagement record ID with the API name of the engagement object.

The `Engagement` class includes these constructors.

Engagement(recordId, objectApiName)

Creates an instance of the `DataRetrieval.Engagement` class to associate an engagement record ID with the API name of the engagement object.

Engagement()

Creates an instance of the `DataRetrieval.Engagement` class.

`Engagement(recordId, objectApiName)`

Creates an instance of the `DataRetrieval.Engagement` class to associate an engagement record ID with the API name of the engagement object.

Signature

```
public Engagement(String recordId, String objectApiName)
```

```
DataRetrieval.Engagement, newinstance, [String, String], DataRetrieval.Engagement
```

Parameters

recordId

Type: String

ID of the engagement record that's associated with the interaction between a customer and an agent.

objectApiName

Type: String

API name of the engagement object that's associated with the interaction between a customer and an agent.

SEE ALSO:

https://help.salesforce.com/s/articleView?id=sf.engagement_get_engagements_invocable_action_considerations.htm

`Engagement()`

Creates an instance of the `DataRetrieval.Engagement` class.

Signature

`public Engagement()`

```
DataRetrieval.Engagement, newinstance, [], DataRetrieval.Engagement
```

Engagements Class

Stores the a list of `DataRetrieval.Engagement` records.

Namespace

DataRetrieval

Engagements Constructors

Use the `Engagements` constructor to initialize the `Engagements` class that stores the list of engagement records.

Engagements Constructors

Use the `Engagements` constructor to initialize the `Engagements` class that stores the list of engagement records.

The `Engagements` class includes these constructors.

Engagements(records)

Creates an instance of the `DataRetrieval.Engagements` class by using specified parameters to store the engagement records.

Engagements()

Creates an instance of the `DataRetrieval.Engagements` class.

`Engagements(records)`

Creates an instance of the `DataRetrieval.Engagements` class by using specified parameters to store the engagement records.

Signature

`public Engagements(List<DataRetrieval.Engagement> records)`

```
DataRetrieval.Engagements, newinstance, [List<DataRetrieval.Engagement>],
DataRetrieval.Engagements
```

Parameters

records

Type: List<DataRetrieval.Engagement>

The `DataRetrieval.Engagement` records, including the `objectApiNames` and `recordIds` parameters.

`Engagements()`

Creates an instance of the `DataRetrieval.Engagements` class.

Signature

`public Engagements()`

```
DataRetrieval.Engagements, newinstance, [], DataRetrieval.Engagements
```

EngagementRecordDetails Class

Stores the details of the conversation between a customer and an agent, including engagement record ID, start time, end time, and conversation identifier.

Namespace

DataRetrieval

EngagementRecordDetails Constructors

Use the `EngagementRecordDetails` constructor to initialize the `EngagementRecordDetails` class that stores the details of the conversation between a customer and an agent.

EngagementRecordDetails Constructors

Use the `EngagementRecordDetails` constructor to initialize the `EngagementRecordDetails` class that stores the details of the conversation between a customer and an agent.

The `EngagementRecordDetails` class includes these constructors.

EngagementRecordDetails(recordId, conversationIdentifier, startDateTime, endDateTime)

Creates an instance of the `DataRetrieval.EngagementRecordDetails` class to store the ID of the engagement record, conversation ID, start date, and end date associated with a conversation between a customer and an agent.

EngagementRecordDetails()

Creates an instance of the `DataRetrieval.EngagementRecordDetails` class.

`EngagementRecordDetails(recordId, conversationIdentifier, startDateTime, endDateTime)`

Creates an instance of the `DataRetrieval.EngagementRecordDetails` class to store the ID of the engagement record, conversation ID, start date, and end date associated with a conversation between a customer and an agent.

Signature

```
public EngagementRecordDetails(String recordId, String conversationIdentifier, Datetime startDateTime, Datetime endDateTime)
```

```
DataRetrieval.EngagementRecordDetails, newinstance, [String, String, Datetime, Datetime], DataRetrieval.EngagementRecordDetails
```

Parameters

recordId
Type: String

ID of the engagement record that's associated with the interaction between a customer and an agent.

conversationIdentifier
Type: String

Unique identifier of a conversation session between a customer and an agent.

startDateTime
Type: Datetime

Date and time the conversation started.

endDateTime
Type: Datetime

Date and time the conversation ended.

EngagementRecordDetails()

Creates an instance of the `DataRetrieval.EngagementRecordDetails` class.

Signature

```
public EngagementRecordDetails()
```

```
DataRetrieval.EngagementRecordDetails, newinstance, [], DataRetrieval.EngagementRecordDetails
```

EngagementRecordDetailsList Class

Stores the `DataRetrieval.EngagementRecordDetails` records.

Namespace

DataRetrieval

EngagementRecordDetailsList Constructors

Use the `EngagementRecordDetailsList` constructors to initialize the `EngagementRecordDetailsList` class that stores the engagement record details.

EngagementRecordDetailsList Constructors

Use the `EngagementRecordDetailsList` constructors to initialize the `EngagementRecordDetailsList` class that stores the engagement record details.

The `EngagementRecordDetailsList` class includes these constructors.

EngagementRecordDetailsList(engagementRecordDetails)
Creates an instance of the `DataRetrieval.EngagementRecordDetailsList` class by using specified parameters to store the engagement record details.

EngagementRecordDetailsList()
Creates an instance of the `DataRetrieval.EngagementRecordDetailsList` class.

EngagementRecordDetailsList(engagementRecordDetails)

Creates an instance of the `DataRetrieval.EngagementRecordDetailsList` class by using specified parameters to store the engagement record details.

Signature

```
public EngagementRecordDetailsList(List<DataRetrieval.EngagementRecordDetails>
engagementRecordDetails)
```

```
DataRetrieval.EngagementRecordDetailsList, newinstance,
[List<DataRetrieval.EngagementRecordDetails>], DataRetrieval.EngagementRecordDetailsList
```

Parameters

engagementRecordDetails
Type: List<DataRetrieval.EngagementRecordDetails>

The `DataRetrieval.EngagementRecordDetails` records.

EngagementRecordDetailsList()

Creates an instance of the `DataRetrieval.EngagementRecordDetailsList` class.

Signature

```
public EngagementRecordDetailsList()
```

```
DataRetrieval.EngagementRecordDetailsList, newinstance, [],
DataRetrieval.EngagementRecordDetailsList
```

ObjectDetailsRepresentation Class

Stores the details of an object and its associated records so that you can use the data for object summarization.

Namespace

DataRetrieval

ObjectDetailsRepresentation Constructors

The `ObjectDetailsRepresentation` class includes these constructors.

ObjectDetailsRepresentation Constructors

The `ObjectDetailsRepresentation` class includes these constructors.

ObjectDetailsRepresentation(records)

Creates an instance of the `DataRetrieval.ObjectDetailsRepresentation` class by using the specified parameters to store the details of the records associated with an object.

ObjectDetailsRepresentation()

Creates an instance of the `DataRetrieval.ObjectDetailsRepresentation` class.

`ObjectDetailsRepresentation(records)`

Creates an instance of the `DataRetrieval.ObjectDetailsRepresentation` class by using the specified parameters to store the details of the records associated with an object.

Signature

```
public ObjectDetailsRepresentation(List<DataRetrieval.RecordDetailsRepresentation>
records)
```

```
DataRetrieval.ObjectDetailsRepresentation, newinstance,
[List<DataRetrieval.RecordDetailsRepresentation>], DataRetrieval.ObjectDetailsRepresentation
```

Parameters

`records`

Type: List<DataRetrieval.RecordDetailsRepresentation>

The record details associated with an object.

`ObjectDetailsRepresentation()`

Creates an instance of the `DataRetrieval.ObjectDetailsRepresentation` class.

Signature

```
public ObjectDetailsRepresentation()
```

```
DataRetrieval.ObjectDetailsRepresentation, newinstance, [],
DataRetrieval.ObjectDetailsRepresentation
```

RecordDetailsRepresentation Class

Stores the details of an individual record, including its associated field data.

Namespace

DataRetrieval

RecordDetailsRepresentation Constructors

The `RecordDetailsRepresentation` class includes these constructors.

RecordDetailsRepresentation Constructors

The `RecordDetailsRepresentation` class includes these constructors.

RecordDetailsRepresentation(fields)

Creates an instance of the `DataRetrieval.RecordDetailsRepresentation` class by using specified parameters to store the data of the fields associated with a record.

RecordDetailsRepresentation()

Creates an instance of the `DataRetrieval.RecordDetailsRepresentation` class.

RecordDetailsRepresentation(fields)

Creates an instance of the `DataRetrieval.RecordDetailsRepresentation` class by using specified parameters to store the data of the fields associated with a record.

Signature

```
public RecordDetailsRepresentation(List<DataRetrieval.FieldDetailsRepresentation>
fields)
```

```
DataRetrieval.RecordDetailsRepresentation, newinstance,
[List<DataRetrieval.FieldDetailsRepresentation>], DataRetrieval.RecordDetailsRepresentation
```

Parameters

fields

Type: List<DataRetrieval.FieldDetailsRepresentation on page 1391 >

List of field names and their corresponding values in key-value pairs.

RecordDetailsRepresentation()

Creates an instance of the `DataRetrieval.RecordDetailsRepresentation` class.

Signature

```
public RecordDetailsRepresentation()
```

```
DataRetrieval.RecordDetailsRepresentation, newinstance, [],
DataRetrieval.RecordDetailsRepresentation
```

FieldDetailsRepresentation Class

Stores the field names and their values associated with a record, which can later be used for various operations or data processing tasks.

Namespace

DataRetrieval

FieldDetailsRepresentation Constructors

The `FieldDetailsRepresentation` class includes these constructors.

FieldDetailsRepresentation Constructors

The `FieldDetailsRepresentation` class includes these constructors.

FieldDetailsRepresentation(fieldName, fieldValue)

Creates an instance of the `DataRetrieval.FieldDetailsRepresentation` class by using the given key-value pairs to store field names and their corresponding values.

FieldDetailsRepresentation()

Creates an instance of the `DataRetrieval.FieldDetailsRepresentation` class.

`FieldDetailsRepresentation(fieldName, fieldValue)`

Creates an instance of the `DataRetrieval.FieldDetailsRepresentation` class by using the given key-value pairs to store field names and their corresponding values.

Signature

```
public FieldDetailsRepresentation(String fieldName, String fieldValue)
```

```
DataRetrieval.FieldDetailsRepresentation, newinstance, [String, String],
DataRetrieval.FieldDetailsRepresentation
```

Parameters

`fieldName`

Type: String

Name of the field associated with a record.

`fieldValue`

Type: String

Value of the *`fieldName`* parameter associated with a record.

`FieldDetailsRepresentation()`

Creates an instance of the `DataRetrieval.FieldDetailsRepresentation` class.

Signature

```
public FieldDetailsRepresentation()
```

```
DataRetrieval.FieldDetailsRepresentation, newinstance, [],
DataRetrieval.FieldDetailsRepresentation
```

RecordTranscripts Class

Stores the transcripts of a single interaction session record, such as a messaging session or a voice call.

Namespace

DataRetrieval

RecordTranscripts Constructors

The `RecordTranscripts` class includes these constructors.

RecordTranscripts Constructors

The `RecordTranscripts` class includes these constructors.

RecordTranscripts(transcripts, recordId)

Creates an instance of the `DataRetrieval.RecordTranscripts` class by using the specified parameters to store the transcripts associated with an engagement record.

RecordTranscripts()

Creates an instance of the `DataRetrieval.RecordTranscripts` class.

`RecordTranscripts(transcripts, recordId)`

Creates an instance of the `DataRetrieval.RecordTranscripts` class by using the specified parameters to store the transcripts associated with an engagement record.

Signature

```
public RecordTranscripts(List<DataRetrieval.Transcript> transcripts, String recordId)
```

```
DataRetrieval.RecordTranscripts, newinstance, [List<DataRetrieval.Transcript>, String],
DataRetrieval.RecordTranscripts
```

Parameters

`transcripts`

Type: List<DataRetrieval.Transcript>

The transcripts from a single interaction session between a customer and an agent.

`recordId`

Type: String

ID of the interaction session record, such as a messaging session or a voice call.

`RecordTranscripts()`

Creates an instance of the `DataRetrieval.RecordTranscripts` class.

Signature

```
public RecordTranscripts()
```

```
DataRetrieval.RecordTranscripts, newinstance, [], DataRetrieval.RecordTranscripts
```

RecordTranscriptsList Class

Stores the transcripts from multiple interaction sessions between customers and agents.

Namespace

DataRetrieval

RecordTranscriptsList Constructors

The `RecordTranscriptsList` class includes these constructors.

RecordTranscriptsList Constructors

The `RecordTranscriptsList` class includes these constructors.

RecordTranscriptsList(conversations, conversationsTokens)

Creates an instance of the `DataRetrieval.RecordTranscriptsList` class by using specified parameters to store the transcripts associated with engagement records.

RecordTranscriptsList()

Creates an instance of the `DataRetrieval.RecordTranscriptsList` class.

`RecordTranscriptsList(conversations, conversationsTokens)`

Creates an instance of the `DataRetrieval.RecordTranscriptsList` class by using specified parameters to store the transcripts associated with engagement records.

Signature

```
public RecordTranscriptsList(List<DataRetrieval.RecordTranscripts> conversations,
Integer conversationsTokens)
```

```
DataRetrieval.RecordTranscriptsList, newinstance, [List<DataRetrieval.RecordTranscripts>,
 Integer], DataRetrieval.RecordTranscriptsList
```

Parameters

`conversations`

Type: List<DataRetrieval.RecordTranscripts>

List of transcripts from multiple interaction sessions between customers and agents.

conversationsTokens

Type: Integer

Number of tokens of conversation transcripts.

RecordTranscriptsList()

Creates an instance of the `DataRetrieval.RecordTranscriptsList` class.

Signature

```
public RecordTranscriptsList()
```

```
DataRetrieval.RecordTranscriptsList, newinstance, [], DataRetrieval.RecordTranscriptsList
```

Transcript Class

Stores the conversation between customers and agents in written format, specifying the roles of the participants and their messages.

Namespace

DataRetrieval

Transcript Constructors

The `Transcript` class includes these constructors.

Transcript Constructors

The `Transcript` class includes these constructors.

Transcript(role, message)

Creates an instance of the `DataRetrieval.Transcript` class by using specified parameters to store the role and message of the participants associated with a transcript.

Transcript()

Creates an instance of the `DataRetrieval.Transcript` class.

Transcript(role, message)

Creates an instance of the `DataRetrieval.Transcript` class by using specified parameters to store the role and message of the participants associated with a transcript.

Signature

```
public Transcript(String role, String message)
```

```
DataRetrieval.Transcript, newinstance, [String, String], DataRetrieval.Transcript
```

Parameters

role
Type: String

Role of the participant in the conversation.

message
Type: String

Message exchanged during the conversation between a customer and an agent.

Transcript()

Creates an instance of the `DataRetrieval.Transcript` class.

Signature

`public Transcript()`

```
DataRetrieval.Transcript, newinstance, [], DataRetrieval.Transcript
```

Integrate the Engagement Objects Into Your CTI System

Modify your CTI adapter so that when a customer service representative (CSR) accepts an incoming call using the softphone, an engagement interaction record for the call is created. Engagement Interaction is part of the Engagement data model, which has two other objects, Engagement Attendee and Engagement Topic. These objects store details such as the start and end date and time of an interaction, what an interaction is about, and attendee details.

Modifications to the CTI Adapter

Note: We use the Open CTI demo adapter as an example to describe the changes that you're required to make. To interact with the engagement objects, make similar modifications to your adapter using Engagement Connect APIs or the sObject API.

The Engagement Connect APIs (REST or Apex) provide a way to create, get, and delete engagement attendee, engagement interaction, and engagement topic records.

Note: Using the Connect APIs, you can perform all three operations on all three engagement objects in a single API call.

Alternatively, use the sObject API to perform CRUD operations on the engagement objects.

The demo adapter triggers an Aura component code when an incoming call is accepted using the softphone. The `callInitiatedPanel.cmp` is displayed that contains the accept listener.

```
<button class="slds-size--1-of-2 slds-button slds-button--brand"
onclick="{!c.accept}">Accept</button>
```

At the same time, an event is raised, which is captured by the `accept` method in the `callInitiatedPanelController.js` file.

```
accept : function(cmp, event, helper) {
helper.renderConnectedPanel(cmp);
},
```

The method brings up the Connected panel defined in the helper. The panel contains the `SoftphoneContactSearchController` Apex class, which is called from the `callInitiatedPanelHelper.js` file.

```
renderConnectedPanel : function(cmp){
    var recordId = cmp.get('v.recordId');
    var account = cmp.get('v.account');
    var recparam=(recordId)?recordId:'UNKNOWN';
    sforce.opencti.runApex({
        apexClass : 'SoftphoneContactSearchController',
        methodName : 'createEngagementInteraction',
        methodParams : 'recordId='+recparam ,
        callback : function(result) {
            cmp.getEvent('editPanel').setParams({
                label : 'Open CTI Softphone: ' + cmp.get('v.state')
            }).fire();
            if (result.success) {
                sforce.opencti.screenPop({
                    type : sforce.opencti.SCREENPOP_TYPE.SOBJECT,
                    params : { recordId : result.returnValue.runApex }
                });
            } else {
                throw new Error('Unable to make a call. Contact your admin.');
            }
            cmp.getEvent('renderPanel').setParams({
                type : 'c:connectedPanel',
                attributes : {
                    showDialPad : false,
                    recordId : recordId,
                    engagementId : result.returnValue.runApex,
                    callType : 'Inbound',
                    account : account,
                    recordName: cmp.get('v.recordName'),
                    presence : cmp.get('v.presence')
                }
            }).fire();
        }
    });
}
```

The `SoftphoneContactSearchController` Apex class contains the `createEngagementInteraction` method, which uses the connect API to create an engagement interaction record as shown in this example:

```
// Create Engagement Interaction using connect API
webService static String createEngagementInteraction(String recordId) {
    system.debug('In create Engagement Interaction');
    ConnectApi.EngagementInteractionCreateInput interactionInput = new
ConnectApi.EngagementInteractionCreateInput();
    interactionInput.communicationChannel = 'Voice Call';
    interactionInput.attendeeVerified = false;
    interactionInput.startDateTime =
datetime.now().formatGMT('yyyy-MM-dd\'T\'HH:mm:ss.SSS\'Z\'');
    interactionInput.status = 'New';
    if(recordId !='UNKNOWN' ){
        interactionInput.initiatingAttendeeId = recordId;
        interactionInput.attendeeAuthenticated = true;
```

```
    }
    ConnectApi.EngagementsCreateInput containerInput = new
ConnectApi.EngagementsCreateInput();
    containerInput.engagementInteraction = interactionInput;
    ConnectApi.EngagementsCreateOutput output =
ConnectApi.EngagementContainerConnect.createEngagementInteraction(containerInput);
    return output.engagementInteraction.id;
}
```

if you want to create engagement attendee and engagement topic records along with the engagement interaction record using the connect API, you can change the input to the `createEngagementInteraction` method. . This example shows how to create engagement attendee records using the Connect API:

```
List<ConnectApi.EngagementAttendeeCreateInput> eaList = new
List<ConnectApi.EngagementAttendeeCreateInput>();
ConnectApi.EngagementAttendeeCreateInput internalAttendeeInput = new
ConnectApi.EngagementAttendeeCreateInput();
internalAttendeeInput.startDateTime =
datetime.now().formatGMT('yyyy-MM-dd\'T\'HH:mm:ss.SSS\'Z\'');
internalAttendeeInput.internalAttendeeId = UserInfo.getUserId();
eaList.add(internalAttendeeInput);
if(recordId !='UNKNOWN' ){
    ConnectApi.EngagementAttendeeCreateInput externalAttendeeInput = new
ConnectApi.EngagementAttendeeCreateInput();
    externalAttendeeInput.startDateTime =
datetime.now().formatGMT('yyyy-MM-dd\'T\'HH:mm:ss.SSS\'Z\'');
    externalAttendeeInput.externalAttendeeId = recordId;
    eaList.add(externalAttendeeInput);
}
interactionInput.engagementAttendees = eaList;
```

Engagement attendee records for internal attendees of an engagement are automatically created after an engagement interaction record is created. If necessary, stop the automatic creation of engagement attendee records by turning off the Auto-Creation of Internal Attendee Record org preference.

When the call ends, another Aura component code is triggered.

```
<button aura:id="endcall" class="slds-size--1-of-2 slds-button slds-button--destructive"
onclick="{!c.endCall}">End</button>
```

The `endCall` listener invokes the `endCall` method in the `connectedPanelController.js` file.

```
endCall: function(cmp, event, helper) {
sforce.opencti.runApex({
apexClass : 'SoftphoneContactSearchController',
methodName : 'updateEngagementInteraction',
methodParams : 'recordId=' + cmp.get('v.engagementId'),
callback : function(result) {
if (result.success) {
} else {
throw new Error(
'Unable to update EI. Contact your admin.');
}
helper.logCall(cmp, function(response) {
cmp.getEvent('renderPanel').setParams({
type : 'c:phonePanel',
```

```
toast : {'type': 'normal', 'message': 'Call was ended.'},
attributes : { presence : cmp.get('v.presence')}
}).fire();
})
var param = {callback:
function(response) {
if (response.success) {
console.log('API method call executed successfully! returnValue:', response.returnValue);
} else {
console.error('Something went wrong! Errors:', response.errors);
}
}};
sforce.opencti.refreshView(param);
}
});
}
```

If necessary, add methods to update engagement interaction, engagement attendee, and engagement topic records to the `SoftphoneContactSearchController` Apex class.

Alternatively, use the sObject API to perform CRUD operations on the engagement objects. This example shows how to create or edit engagement attendee or engagement topic records using the sObject API:

```
//Create Engagement Attendee
List<EngagementAttendee> eaList = new List<EngagementAttendee>();
EngagementAttendee internalAttendeeInput = new EngagementAttendee();
internalAttendeeInput.EngagementId = output.engagementInteraction.id;
internalAttendeeInput.StartDateTime = datetime.now();
3
Integrate Your CTI System with the Engagement Objects
internalAttendeeInput.InternalAttendeeId = UserInfo.getUserId();
eaList.add(internalAttendeeInput);
insert eaList;
System.debug('EI Created'+eaList.get(0).id);
//Update Engagement Attendee
EngagementAttendee internalAttendee=[select id from EngagementAttendee where
EngagementId=:output.engagementInteraction.id];
internalAttendee.EndDateTime = datetime.now();
internalAttendee.IsVerified = true;
internalAttendee.Role='Self';
update internalAttendee;
System.debug('EA updated'+internalAttendee.EndDateTime);
//Create Engagement Topic
List<EngagementTopic> topicList = new List<EngagementTopic>();
EngagementTopic topic = new EngagementTopic();
topic.EngagementId = output.engagementInteraction.id;
topic.Name = 'Address Change';
topicList.add(topic);
insert topicList;
System.debug('ET Created'+topicList.get(0).id);
//Update Engagement Topic
EngagementTopic engagementTopic = [select id from EngagementTopic where
EngagementId=:output.engagementInteraction.id];
engagementTopic.ProcessFailureReason = 'Job Shift';
update engagementTopic;
```

CHAPTER 17 Group Membership and Households

In this chapter ...

- Group Membership and Households Data Model
- Group Membership and Households Standard Objects
- Group Membership and Households Business APIs

Create and define groups of individuals, such as households. Connect individuals and organizations to each other and track their relationships.

SEE ALSO:

Salesforce Help: Group Membership and Households

EDITIONS

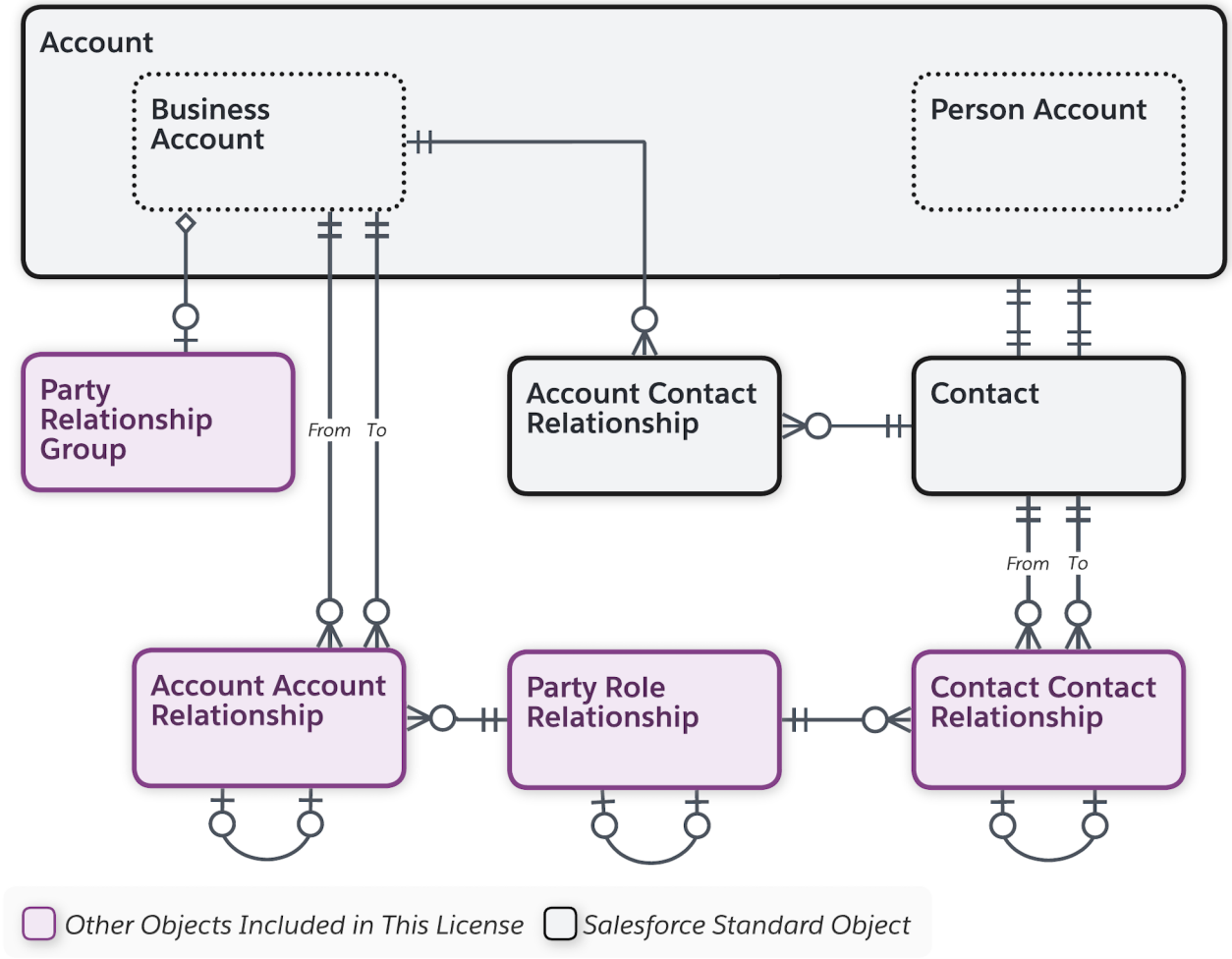
Available in: Lightning Experience. View product and edition availability.

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**.

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()`

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the account associated with this account account relationship. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account
`EndDate`	**Type** date

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship ends.
`HierarchyType`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** 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`	**Type** 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`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	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`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the account account relationship.
`OwnerId`	**Type** 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. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`PartyRoleRelationId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The relationship between two accounts. This field is a relationship field. **Relationship Name** PartyRoleRelation **Relationship Type** Lookup **Refers To** PartyRoleRelation

Field	Details
RelatedAccountId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The related account in the relationship. This field is a relationship field. **Relationship Name** RelatedAccount **Relationship Type** Lookup **Refers To** Account
RelatedInverseRecordId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship starts.

Associated Objects

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

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

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Lookup to the Account object. This field is a relationship field. **Relationship Name** Account **Relationship Type** Lookup **Refers To** Account

Field	Details
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** Lookup to the Contact object. This field is a relationship field. **Relationship Name** Contact **Relationship Type** Lookup **Refers To** Contact
`DataRollupCategories`	**Type** multipicklist **Properties** Create, Filter, Nillable, Update **Description** Specifies the categories in which the data associated with a group is aggregated.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date a relationship between a contact and account ended. Use with the Start Date to keep a history of the relationship.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether relationship is active (true) or not (false). The default value is `false`.
`IsDirect`	**Type** 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`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the group is a primary group for the member (yes) or not (no). The default value is `false`.
`IsPrimaryMember`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the member is a primary contact of a group (true) or not (false). The default value is `false`.
`Roles`	**Type** multipicklist **Properties** 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`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date a relationship between a contact and account began. Use with the End Date to keep a history of the relationship

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.

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()`

Fields

Field	Details
`ContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** 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`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship ends.
`HierarchyType`	**Type** 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`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the contact is actively involved with the related contact. The default value is `false`.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last accessed this record, a record related to this record, or a list view.

Field	Details
LastViewedDate	**Type** 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	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the contact contact relationship.
OwnerId	**Type** 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. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
PartyRoleRelationId	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The relationship between two contacts. This field is a relationship field. **Relationship Name** PartyRoleRelation **Relationship Type** Lookup

Field	Details
	Refers To PartyRoleRelation
`RelatedContactId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The related contact in the relationship. This field is a relationship field. **Relationship Name** RelatedContact **Relationship Type** Lookup **Refers To** Contact
`RelatedInverseRecordId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The date when the relationship starts.

Associated Objects

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

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.

ContactContactRelationOwnerSharingRule
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()`

Fields

Field	Details
`AccountId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** 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`	**Type** 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`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the party relationship group.
`EndDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The end date associated with the party relationship group.
`GroupIncome`	**Type** currency **Properties** Create, Filter, Nillable, Sort, Update **Description** The total income of the party relationship group.
`GroupSize`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of active members associated with the party relationship group.
`LastReferencedDate`	**Type** dateTime

Field	Details
	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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the party relationship group.
`PrimaryAddress`	**Type** address **Properties** Filter, Nillable **Description** The primary address of the party relationship group.
`PrimaryCity`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary city of the party relationship group.
`PrimaryCountry`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary country of the party relationship group.

Field	Details
`PrimaryGeocodeAccuracy`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The level of accuracy of a location's geographical coordinates compared with its physical address. A geocoding service typically provides this value based on the 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`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** 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`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** 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`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The primary postal code of the party relationship group.
`PrimaryState`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary state of the party relationship group.
`PrimaryStreet`	**Type** textarea **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The primary street of the party relationship group.
`StartDate`	**Type** date **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The start date associated with the party relationship group.
`Status`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The status of the party relationship group. Possible values are: • `Active` • `Inactive` The default value is `Active`.
`Subtype`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The subclassification of the party relationship group type.

Field	Details
	Possible values are: • `Extension Household` • `Nuclear Household` • `Three Person Household`
`Type`	**Type** picklist **Properties** 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`.

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.

PartyRelationshipGroupChangeEvent (API Version 63.0)
Change events are available for the object.

PartyRelationshipGroupFeed
Feed tracking is available for the object.

PartyRelationshipGroupHistory
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()`

Fields

Field	Details
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (`LastReferencedDate`) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** Name of the party role relationship.
`OwnerId`	**Type** 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. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`RelatedInverseRecordId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The role that's related to another role in the relationship.
`RelationshipObjectName`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** The object that's associated with the relationship. Possible values are: • `Account_Account_Relationship`—Account Account Relationship • `Contact_Contact_Relationship`—Contact Contact Relationship The default value is `Account_Account_Relationship`.
`RoleName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The name of the role in the relationship.
`ShouldCreaInversRoleAuto`	**Type** boolean

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort **Description** Indicates whether a role record should be created automatically for the relationship (true) or not (false). 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.

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

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/group/group-definitions
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
    "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":"0zlxx0000000001AAA",
                   "relatedContactId":"003xx000004WhJ2AAK",
                   "startDate":"2023-06-14T00:00:00.000Z"
                }
             ]
          }
       ]
    },
    "externalMember":{
       "records":[
```

```
            {
               "contactId":"003xx000004WhJ2AAK",
               "roles":"Decision Maker"
            }
         ]
      },
      "relatedGroup":{
         "relations":[
            {
               "type":"Direct",
               "roleRelationId":"0zlxx000000001dAAA",
               "relatedAccountId":"001xx000003GYodAAG"
            }
         ]
      },
      "relatedAccount":{
         "relations":[

         ]
      }
   }
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountDetail`	Map<String, Object>	Account details associated with the party relationship group.	Required	58.0
`externalMember`	Member Record Input[]	External member details of the party relationship group.	Optional	58.0
`groupDetail`	Map<String, Object>	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
`relatedAccount`	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

JSON example

```
{
   "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":"0wKRM000000001n2AA"
   },
   "member":{
      "records":[
         {
            "acrId":"07kRM000000Op0fYAC",
            "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":"0zlRM0000000014YAA",
                  "relatedContactId":"003RM00000895N9YAI",
                  "isActive":false
               },
               {
                  "ccrId":"0zmRM000000002NYAQ",
                  "roleRelationId":"0zlRM0000004CAaYAM",
                  "relatedContactId":"003RM00000895NFYAY",
                  "isActive":true
               }
            ]
         }
      ]
   },
   "externalMember":{
      "records":[
         {
            "acrId":"07kRM000000KYHpYAO",
            "contactId":"003RM00000895NFYAY",
            "isPrimaryMember":false,
            "isActive":true,
            "isPrimaryGroup":false,
            "roles":"Technical Buyer",
            "direct":false,
            "relations":[

            ]
         },
         {
            "acrId":"07kRM000000OpPdYAK",
            "contactId":"003RM0000089pihYAA",
            "isPrimaryMember":false,
            "isActive":true,
            "isPrimaryGroup":false,
            "roles":"Influencer",
            "direct":false,
            "relations":[

            ]
         }
      ]
   },
   "relatedGroup":{
      "relations":[
         {
            "aarId":"0zoRM0000004CBKYA2",
            "roleRelationId":"0zlRM000000001JYAQ",
            "accountId":"001RM000005aVTBYA2",
```

```
            "relatedAccountId":"001RM000005aGUcYAM",
            "isActive":true,
            "hierarchyType":"Peer",
            "customFields":{
               "CF3__c":false
            }
         },
         {
            "aarId":"0zoRM000000003KYAQ",
            "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":"0zoRM000000003PYAQ",
            "roleRelationId":"0zlRM0000004C9mYAE",
            "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":"0zlRM000000001JYAQ",
            "accountId":"001RM000005iEBkYAM",
            "relatedAccountId":"001RM000005aGUcYAM",
            "isActive":true,
            "hierarchyType":"Peer",
            "customFields":{
               "CF3__c":false
            }
         },
         {
            "aarId":"0zoRM000000003GYAQ",
            "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":"0zlRM000000001JYAQ",
         "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":"0zlRM000000001JYAQ",
         "accountId":"001RM000005aGUcYAM",
         "relatedAccountId":"001RM000005aGUNYA2",
         "isActive":false,
         "hierarchyType":"Peer",
         "customFields":{
            "CF3__c":false,
```

```
                "CF4__c":"A;D"
            }
        },
        {
            "aarId":"0zoRM000000004mYAA",
            "roleRelationId":"0zlRM000000001TYAQ",
            "accountId":"001RM000005aGUcYAM",
            "relatedAccountId":"001RM000005YXsUYAW",
            "isActive":true,
            "hierarchyType":"Peer",
            "customFields":{
                "CF3__c":true,
                "CF4__c":"A;C"
            }
        }
    ]
  },
  "tasks":[
    "a03RM0000001Npi",
    "a03RM0000001Npn"
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`accountDetail`	Account Input	Details of the merged account.	Required	58.0
`externalMember`	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
`primaryAccountId`	String	ID of the primary account.	Required	58.0
`relatedAccount`	Account Relation Input	Details of the related account.	Optional	58.0
`relatedGroup`	Account Relation Input	Details of the party relationship group.	Optional	58.0
`secondaryAccountId`	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	Type	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/connect/group/group-fields?groupIds=<0wKRM000000001n2AA>,<0wKRM000000004n2YY>
```

Available version

58.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`groupIds`	String[]	Comma-separated list of the group IDs to merge the party relationship group details.	Required	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

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/group/accounts/${001RM000005aVSIYA2}/related-records
```

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.

JSON example

```
"billingAddress":{
   "street":"",
   "city":"Los Angeles",
   "state":"California",
   "country":"USA",
   "postalCode":"94263"
},
"shippingAddress":{
   "street":"",
   "city":"Los Angeles",
   "state":"California",
   "country":"USA",
```

```
            "postalCode":"94263"
        },
```

Properties

Name	Type	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.

JSON example

```
    "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"
    }
```

Properties

Name	Type	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>	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	Type	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":"0zlxx000000001dAAA",
            "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":"0zlxx000000001dGAC",
            "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	Type	Description	Required or Optional	Available Version
aarId	String	Record ID of the AccountRelationship object.	Optional	58.0

Name	Type	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>	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
`relatedAccountId`	String	Record ID of the related account. If the account relationship type is direct, then the related account ID is required.	Optional	58.0
`relatedInverseRecordId`	String	Record ID of the related inverse relationship record.	Optional	58.0
`roleRelationId`	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 `relatedInverseRecordId` property is specified, then the relationship type is indirect.	Optional	58.0

Group Definition Input

Input representation of a party relationship group definition.

JSON example

```
{
    "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":"0zlxx0000000001AAA",
                     "relatedContactId":"003xx000004WhJ2AAK",
                     "startDate":"2023-06-14T00:00:00.000Z"
                  }
               ]
            }
         ]
      },
      "externalMember":{
         "records":[
            {
               "contactId":"003xx000004WhJ2AAK",
               "roles":"Decision Maker"
            }
         ]
      },
      "relatedGroup":{
         "relations":[
            {
               "type":"Direct",
```

```
            "roleRelationId":"0zlxx000000001dAAA",
            "relatedAccountId":"001xx000003GYodAAG"
         }
      ]
   },
   "relatedAccount":{
      "relations":[

      ]
   }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
accountDetail	Map<String, Object>	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>	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.

JSON example

```
   "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	Type	Description	Required or Optional	Available Version
`category`	String	Category of the party relationship group.	Optional	58.0
`customFields`	Map<String, Object>	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
`partyRelationGroupId`	String	Record ID of the party relationship group. Record ID is optional when creating a group and required when merging groups.	Required	58.0
`primaryAddress`	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.

JSON example


```
{
   "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":"0wKRM000000001n2AA"
   },
   "member":{
      "records":[
         {
            "acrId":"07kRM000000Op0fYAC",
```

```
            "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":"0zlRM0000000014YAA",
                  "relatedContactId":"003RM00000895N9YAI",
                  "isActive":false
               },
               {
                  "ccrId":"0zmRM000000002NYAQ",
                  "roleRelationId":"0zlRM0000004CAaYAM",
                  "relatedContactId":"003RM00000895NFYAY",
                  "isActive":true
               }
```

```
            ]
         }
      ]
   },
   "externalMember":{
      "records":[
         {
            "acrId":"07kRM000000KYHpYAO",
            "contactId":"003RM00000895NFYAY",
            "isPrimaryMember":false,
            "isActive":true,
            "isPrimaryGroup":false,
            "roles":"Technical Buyer",
            "direct":false,
            "relations":[

            ]
         },
         {
            "acrId":"07kRM000000OpPdYAK",
            "contactId":"003RM0000089pihYAA",
            "isPrimaryMember":false,
            "isActive":true,
            "isPrimaryGroup":false,
            "roles":"Influencer",
            "direct":false,
            "relations":[

            ]
         }
      ]
   },
   "relatedGroup":{
      "relations":[
         {
            "aarId":"0zoRM0000004CBKYA2",
            "roleRelationId":"0zlRM000000001JYAQ",
            "accountId":"001RM000005aVTBYA2",
            "relatedAccountId":"001RM000005aGUcYAM",
            "isActive":true,
            "hierarchyType":"Peer",
            "customFields":{
               "CF3__c":false
            }
         },
         {
            "aarId":"0zoRM000000003KYAQ",
            "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":"0zoRM000000003PYAQ",
            "roleRelationId":"0zlRM0000004C9mYAE",
            "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":"0zlRM000000001JYAQ",
            "accountId":"001RM000005iEBkYAM",
            "relatedAccountId":"001RM000005aGUcYAM",
            "isActive":true,
            "hierarchyType":"Peer",
            "customFields":{
               "CF3__c":false
            }
         },
         {
            "aarId":"0zoRM000000003GYAQ",
            "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":"0zlRM000000001JYAQ",
           "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":"0zlRM000000001JYAQ",
           "accountId":"001RM000005aGUcYAM",
           "relatedAccountId":"001RM000005aGUNYA2",
           "isActive":false,
           "hierarchyType":"Peer",
           "customFields":{
              "CF3__c":false,
              "CF4__c":"A;D"
           }
        },
        {
           "aarId":"0zoRM000000004mYAA",
           "roleRelationId":"0zlRM000000001TYAQ",
           "accountId":"001RM000005aGUcYAM",
           "relatedAccountId":"001RM000005YXsUYAW",
           "isActive":true,
           "hierarchyType":"Peer",
           "customFields":{
              "CF3__c":true,
              "CF4__c":"A;C"
           }
        }
     ]
```

```
    },
    "tasks":[
       "a03RM0000001Npi",
       "a03RM0000001Npn"
    ]
}
```

Properties

Name	Type	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.

JSON example

```
{
       "records":[
          {
             "contactId":"003xx000004WhHQAA0",
             "roles":"Decision Maker",
             "relations":[
                {
                   "roleRelationId":"0zlxx0000000001AAA",
```

```
                    "relatedContactId":"003xx000004WhJ2AAK",
                    "startDate":"2023-06-14T00:00:00.000Z"
                }
            ]
        }
    ]
}
```

Properties

Name	Type	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>	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.

JSON example

```
"relations":[
            {
                "roleRelationId":"0zlRM0000004CAaYAM",
                "relatedContactId":"003RM00000895NFYAY",
                "startDate":"2023-06-14T00:00:00.000Z",
                "endDate":"2024-06-14T00:00:00.000Z",
                "isActive":true,
                "customFields":{
```

```
                    "field1":"field1Value",
                    "field2":"field1Value"
                }
            }
        ]
```

Properties

Name	Type	Description	Required or Optional	Available Version
`ccrId`	String	Record ID of the ContactContactRelationship object.	Optional	58.0
`customFields`	Map<String, Object>	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
`relatedInverseRecordId`	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.

JSON example

```
{
   "accountId": "001RM000005mkcuYAA",
   "code": "200",
```

```
   "isSuccess": true,
   "message": "",
   "partyRelationshipId": "0wKRM00000000BT2AY"
}
```

Property Name	Type	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
partyRelationshipId	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.

JSON example

```
{
   "accountFields":[
      "field1",
      "field2",
      "field3",
      "customFields":[
         "customField1",
         "customField2"
      ]
   ],
   "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	Type	Description	Filter Group and Version	Available Version
accId1	Map<String, Object>	ID of the primary party relationship group.	Small, 58.0	58.0
accId2	Map<String, Object>	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.

JSON example

```
{
   "relatedEntities":{
      "Task":[
            "00Txx000003rIRU",
         "00Txx000003rIUi"
      ],
```

```
        "CaseParticipant":[
           "1caxx00000000BL"
        ],
        "ContentDocumentLink":[
           "06Axx0000004C93"
        ],
        "Case":[
           "500xx000000bod7",
           "500xx000000boej"
        ],
        "Contact":[
           "003xx000004Wi5Q"
        ],
        "PublicComplaint":[
           "0fhxx000000006T"
        ],
        "WorkOrder":[
           "0WOxx0000000001"
        ],
        "CarePlan":[
           "1spxx000000003F"
        ],
        "Opportunity":[
           "006xx000001a332",
           "006xx000001a34e",
           "006xx000001a36G"
        ],
        "Lead":[
           "00Qxx000002TRbO"
        ],
        "Entity1__c":[
           "a01xx000003GaSF"
        ],
        "Asset":[
           "02ixx0000004HHi"
        ],
        "Allegation__c":[
           "a00xx000000bobV"
        ],
        "Contract":[
           "800xx000000bohx"
        ]
    }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`relatedEntities`	Map<String, 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 18 Identity Verification

In this chapter ...

- Identity Verification Connect APIs
- Identity Verification Data Model
- Identity Verification Metadata API
- Identity Verification Tooling API Objects

The Identity Verification feature gives you the ability to verify the identity of a customer before you share any sensitive information with them. Organizations across the world are required to comply with regulations that help to ascertain the customer's identity and provide protection from losses and fraud. Failure to follow these regulations has legal consequences. Organizations must ensure that any person who seeks confidential information must first prove their identity and access.

SEE ALSO:

Identity Verification

Identity Verification Connect APIs

Use the Identity Verification Connect APIs to validate the identity of a representative or customer.

Resources
Here's the list of the Identity Verification API resources.

Requests
Here's the list of the Identity Verification API request bodies.

Responses
Here's the list of the Identity Verification API response bodies.

Resources

Here's the list of the Identity Verification API resources.

Identity Verification Using Form Fields
Verify the identity of a representative or customer by using the inputs submitted through form fields.

Identity Verification Using Form Fields

Verify the identity of a representative or customer by using the inputs submitted through form fields.

Resource

```
connect/identity-verification/input-verification
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/v63.0connect/identity-verification/input-verification
```

Available version

58.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "developerName": "SampleAccountSearch",
  "selectedRecordId": "001xx000003DGV3AAO",
  "formVerificationFieldList": {
  "formVerificationFields": [
    {
      "developerName": "SampleAccountName",
      "value": "Acme",
    },
```

```
    {
      "developerName": "SampleAccountNumber",
      "value": "123456",
      "isVerified":true
    },
    {
      "developerName": "SamplePhone",
      "value": "4158764524"
    },
    {
      "developerName": "SamplePostalCode",
      "value": "51605"
    }
  ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`developerName`	String	Developer name of the identity verification process detail.	Required	58.0
`formVerificationFieldList`	Identity Verf Form Field Input[]	Details of the required and optional verification fields and values.	Required	58.0
`selectedRecordId`	String	Record ID of the selected customer or representative.	Required	58.0

Response body for POST

Form Verification

Requests

Here's the list of the Identity Verification API request bodies.

Form Verification

Input representation of form verification requests.

Form Verification Field

Input representation of form verification field requests.

Form Verification

Input representation of form verification requests.

JSON example

```
{
  "developerName": "SampleAccountSearch",
  "selectedRecordId": "001xx000003DGV3AAO",
  "formVerificationFieldList": {
  "formVerificationFields": [
    {
      "developerName": "SampleAccountName",
      "value": "Acme",
    },
    {
      "developerName": "SampleAccountNumber",
      "value": "123456",
      "isVerified":true
    },
    {
      "developerName": "SamplePhone",
      "value": "4158764524"
    },
    {
      "developerName": "SamplePostalCode",
      "value": "51605"
    }
  ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`developerName`	String	Developer name of the identity verification process detail.	Required	58.0
`formVerificationFieldList`	Identity Verf Form Field Input[]	Details of the required and optional verification fields and values.	Required	58.0
`selectedRecordId`	String	Record ID of the selected customer or representative.	Required	58.0

Form Verification Field

Input representation of form verification field requests.

JSON example

```
{
  "formVerificationFields": [
    {
      "developerName": "SampleAccountName",
      "value": "Acme",
```

```
    },
    {
      "developerName": "SampleAccountNumber",
      "value": "123456",
      "isVerified":true
    },
    {
      "developerName": "SamplePhone",
      "value": "4158764524"
    },
    {
      "developerName": "SamplePostalCode",
      "value": "51605"
    }
  ]
  }
```

Properties

Name	Type	Description	Required or Optional	Available Version
`developerName`	String	Developer name of the identity verification process field.	Required	58.0
`isVerified`	Boolean	Indicates whether the input that isn't submitted through a form field is verified (`true`) or not (`false`). The default value is `false`.	Optional	58.0
`value`	String	Input value of the field.	Required	58.0

Responses

Here's the list of the Identity Verification API response bodies.

Form Verification
Output representation of form verification responses.

Form Verification Display Record Details
Output representation of form verification display record details response.

Form Verification Field Output
Output representation of form verification field responses.

Form Verification Field List Output
Output representation of form verification field list responses.

Form Verification

Output representation of form verification responses.

JSON example

```
{
  "developerName": "SampleAccountSearch",
  "selectedRecordId": "001xx000003DGV3AAO",
  "isVerified": false,
  "formVerificationFieldList": {
    "formVerificationFields": [
    {
      "developerName": "SampleAccountName",
      "isVerified": true
    },
    {
      "developerName": "SampleAccountNumber",
      "isVerified": true
    },
    {
      "developerName": "SamplePhone",
      "value": "4158764524",
      "isVerified": false
    },
    {
      "developerName": "SamplePostalCode",
      "isVerified": true
    }
    ]
  },
  “displayRecordDetails”: {
 “displayRecordId”: “001axxxxxxx”,
 “displayRecordName”: “SomeReferenceRecord”
  },
 "status": {
    "code":201,
    "message": "Identity Verification is processed successfully."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
developerName	String	Developer name of identity verification process detail.	Small, 58.0	58.0
displayRecordDetails	Identity Verf Form Display Record on page 1456	Name of the field that contains information about the record that's shown to the user after identity verification is successful.	Small, 58.0	58.0
formVerificationFieldList	Identity Verf Form Field List Output on page 1457	Required and optional verification fields, values, and results.	Small, 58.0	58.0
isVerified	Boolean	Indicates whether the identity of the customer or representative is verified (true) or not (false).	Small, 58.0	58.0

Property Name	Type	Description	Filter Group and Version	Available Version
retryCount	Integer	For internal use only.	Small, 58.0	58.0
selectedRecordId	String	Record ID of the selected customer or representative.	Small, 58.0	58.0
status	Error Response	Status of the form verification API request.	Small, 58.0	58.0

Form Verification Display Record Details

Output representation of form verification display record details response.

JSON example

```
 “displayRecordDetails”: {
“displayRecordId”: “001axxxxxxx”,
“displayRecordName”: “SomeReferenceRecord”
 }
```

Property Name	Type	Description	Filter Group and Version	Available Version
displayRecordId	String	ID of the record that's shown to the user after identity verification is successful.	Small, 58.0	58.0
displayRecordName	String	Name of the record that's shown to the user after identity verification is successful.	Small, 58.0	58.0

Form Verification Field Output

Output representation of form verification field responses.

JSON example

```
  {
    "developerName": "SampleAccountName",
    "isVerified": true
  },
  {
    "developerName": "SampleAccountNumber",
    "isVerified": true
  },
  {
    "developerName": "SamplePhone",
    "value": "4158764524",
    "isVerified": false
  },
  {
    "developerName": "SamplePostalCode",
```

```
    "isVerified": true
  }
```

Property Name	Type	Description	Filter Group and Version	Available Version
developerName	String	Developer name of the identity verification process field.	Small, 58.0	58.0
isVerified	Boolean	Indicates whether the input that isn't submitted through a form field is verified (true) or not (false).	Small, 58.0	58.0
value	String	Input value of the field. The field values that fail verification are included in the representation.	Small, 58.0	58.0

Form Verification Field List Output

Output representation of form verification field list responses.

JSON example

```
"formVerificationFields": [
{
  "developerName": "SampleAccountName",
  "isVerified": true
},
{
  "developerName": "SampleAccountNumber",
  "isVerified": true
},
{
  "developerName": "SamplePhone",
  "value": "4158764524",
  "isVerified": false
},
{
  "developerName": "SamplePostalCode",
  "isVerified": true
}
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
formVerificationFields	Identity Verf Form Field Output[] on page 1456	Details, including verification results, of the required and optional verification fields.	Small, 58.0	58.0

Identity Verification Data Model

The Identity Verification data model is used in configuring the process to verify the identity of a caller before their requests are processed by a call center agent.

IdentityVerificationProcDef
Represents the definition of the identity verification process. Available in API version 54.0 and later.

IdentityVerificationProcDtl
Used to configure the search function as well as the minimum number of verifiers for the identity verification process. Available in API version 54.0 and later.

IdentityVerificationProcFld
Used to configure the questions or criteria for verifying the identity of a caller. Available in API version 54.0 and later.

IdentityVerificationProcDef

Represents the definition of the identity verification process. Available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The developer name of a record.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The languages in which translation of record labels is supported. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish

Field	Details
	• `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** Create, Filter, Group, Sort, Update **Description** The label of the Identity Verification Process Definition record.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the **namespacePrefix__componentName** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There's an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that aren't Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.

Field	Details
`SearchLayoutType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The display layout of the search component. Possible values are: • `Stack` • `Tab` Note: As of API version 54.0, Tab isn't supported.

Usage

This object is referenced in the Verify Caller Identity and the Verify Customer Identity flows.

IdentityVerificationProcDtl

Used to configure the search function as well as the minimum number of verifiers for the identity verification process. Available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
`ApexClassId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the Apex class. This is a relationship field. Note: As of API version 54.0, this isn't supported. **Relationship Name** ApexClass

Field	Details
	Relationship Type Lookup **Refers To** ApexClass
`DataSourceType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The source type of the data. Possible values are: • `External` • `Salesforce`
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The developer name of a record.
`DisplayRecordFieldName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the field that contains information about the record that's shown to the user after identity verification is successful. This field is available in API version 58.0 and later.
`IdentityVerificationProcDefId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The label of the relevant Identity Verification Process Definition record. This is a relationship field. **Relationship Name** IdentityVerificationProcDef

Field	Details
	Relationship Type Lookup **Refers To** IdentityVerificationProcDef
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active (`true`) or not (`false`). The default value is `false`.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The languages in which translation of record labels is supported. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)

Field	Details
`LinkedIdVerfProcessDetId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** Configure multiple levels of identity verification. For example, suppose you have two process detail records, Contact Process Detail and Account Process Detail, and Account Process Detail is linked to the contact process detail record. In this case, the contact process detail record is used for primary verification and the account process detail record is used for secondary verification. Then, if your business requirement is to configure a third-level verification process, create another process detail record and set the value of the `LinkedIdVerfProcessDetId` field in the account process detail record to the third process detail record. This field is available in API version 55.0 and later. This field is a relationship field.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label of the Identity Verification Process Detail record.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the **namespacePrefix__componentName** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There's an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that aren't Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.

Field	Details
`ObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the object on which the search is performed and data is verified.
`OptionalVerifiersMinVerfCount`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The minimum number of additional verifiers that must be checked.
`SearchFilter`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Conditions to filter the search results. For example, if you want to perform the search only on Person Account records, enter `isPersonAccount = true`.
`SearchRecordUniqueIdField`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The field storing the unique identifier of records displayed in the search results.
`SearchResultSortBy`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The values that are used to sort the search results. For example, if you want to sort the results by policy date, enter PolicyDate__c Desc.
`SearchSequenceNumber`	**Type** int

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** The sequence in which the search is performed and the search result is displayed.
`SearchType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of search being performed. Possible values are: • `Object-Based` • `Text-Based`

IdentityVerificationProcFld

Used to configure the questions or criteria for verifying the identity of a caller. Available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
`CustomFieldLabel`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The custom label for the field that contains the verification data.
`DataSourceType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The source type of the data. Possible values are:

Field	Details
	• External • Salesforce
DeveloperName	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The developer name of a record.
FieldDataType	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of data stored in an external data source field. Possible values are: • address • checkbox • currency • dateonly • datetime • email • number • other • percent • phone • picklist • reference • text • timeonly • url
FieldName	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label of the field that contains the verification data based on the selected field type.

Field	Details
`FieldType`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The type of field. Possible values are: • `additionalResultField`—Fetches data as part of the search query, but the data isn't displayed in search results. Suppose you want to fetch the policy number and the age of the policy owner as a result of the search but the agent isn't supposed to see this data. You can write custom logic to process this additional data. • `optionalVerifier`—Displays additional verifiers on the verification screen. Note: In API version 56.0 and later, you can display additional verifiers based on fields from the object configured for verification's parent object. For example, if you set identity verification on the Contact object, you can display fields from the Account object. • `requiredVerifier`—Displays required verifiers on the verification screen. Note: In API version 56.0 and later, you can display required verifiers based on fields from the object configured for verification's parent object. For example, if you set identity verification on the Contact object, you can display fields from the Account object. • `resultField`—Displays fields in search results. For example, when an agent searches for a customer or their representative, you'd like the search results to include the account name, phone number, and email ID. Note: In API version 56.0 and later, you can display fields from the parent object of the object configured for verification in the search results. For example, if you set identity verification on the Contact object, which looks up to the Account object, you can display fields from accounts in the search results. • `searchField`—Performs object-based search. • `searchFilter`—Filters search results. When this is set as the field type, specify the field name to filter search results using the FieldName attribute. Both static and dynamic filtering are supported. For example, to search for Contacts whose related Account ID is always 001xx000003GZ4IAAG, set AccountId as the field name and the value of FieldValueFormula to 001xx000003GZ4IAAG. Or, if an agent verifies a customer (Account) and then performs a secondary search against all policies (Policy) in which the verified customer is the policy holder, set FieldName to PolicyHolder and FieldValueFormula to the dynamic value {!SelectedParentRecordId}. This value is available from API version 56.0 and later. Note: You can only use record IDs to dynamically filter search results.

Field	Details
`FieldValueFormula`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Stores the formula that's applied to the field value.
`IdentityVerificationProcDtlId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The label of the relevant Identity Verification Process Detail record. This is a relationship field. **Relationship Name** IdentityVerificationProcDtl **Relationship Type** Lookup **Refers To** IdentityVerificationProcDtl
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record is active (`true`) or not (`false`). The default value is `false`
`IsManualInput`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the user can manually enter the identity verification details (`true`) or not (`false`). The default value is `false`. This field is available in API version 58.0 and later.
`Language`	**Type** picklist

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The languages in which translation of record labels is supported. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The label of the Identity Verification Process Field record.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the **namespacePrefix__componentName** notation.

Field	Details
	The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There's an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that aren't Developer Edition organizations, NamespacePrefix is only set for objects that are part of an installed managed package. There's no namespace prefix for all other objects.
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The sequence number of the field.

Identity Verification Metadata API

Create and edit identity verification configuration using a Metadata API.

Flow for Identity Verification

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.

IdentityVerificationProcDef

Represents the definition of the identity verification process.

Flow for Identity Verification

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

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

Field Name	Field Type	Description
actionType	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Identity Verification include: • saveMemberVerificationSteps—Saves the customer verification data for auditing purposes when the identity verification flow is run. This value is available in API version 56.0 and later.

IdentityVerificationProcDef

Represents the definition of the identity verification process.

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

IdentityVerificationProcDef components have the suffix .IdentityVerificationProcDef and are stored in the IdentityVerificationProcDefs folder.

Version

IdentityVerificationProcDef components are available in API version 54.0 and later.

Special Access Rules

The Health Cloud permission set license is required to use this metadata type.

Fields

Field Name	Description
identityVerificationProcDtls	**Field Type** IdentityVerificationProcDtl[] **Description** A list of Identity Verification Process Detail elements.
masterLabel	**Field Type** string **Description** Required.

Field Name	Description
	The label of the Identity Verification Process Definition record.
searchLayoutType	**Field Type** IdentityVerificationSearchLayoutType (enumeration of type string) **Description** Required. The display layout of the search component. Valid values are: • Stack • Tab

IdentityVerificationProcDtl

Represents the verification-related details such as search criteria, verification criteria, or the custom apex class.

Field Name	Description
apexClass	**Field Type** string **Description** The Apex class that is used to search and verify data in an external system.
dataSourceType	**Field Type** IdentityVerificationDataSourceType (enumeration of type string) **Description** Required. The source type of the data. Valid values are: • External • Salesforce
developerName	**Field Type** string **Description** Required. The developer name of Identity verification process detail. 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.

Field Name	Description
`displayRecordFieldName`	**Field Type** string **Description** The name of the field that contains information about the record that's shown to the user after identity verification is successful. Available in API version 58.0 and later.
`identityVerificationProcFlds`	**Field Type** IdentityVerificationProcFld[] **Description** A list of Identity Verification Process Field elements.
`isActive`	**Field Type** boolean **Description** Indicates whether the record is active (`true`) or not (`false`).
`isRetryAllowedAfterLimit`	**Field Type** boolean **Description** For internal use only.
`linkedIdVerfProcessDet`	**Field Type** string **Description** The record containing the details of the linked identity verification process. Available in API version 58.0 and later.
`masterLabel`	**Field Type** string **Description** Required. The label of the Identity Verification Process Detail record.
`objectName`	**Field Type** string **Description** The name of the object on which the search is performed and data is verified.
`optionalVerifiersMinVerfCount`	**Field Type** int **Description** The number of optional verifiers that must be checked.

Field Name	Description
`retryLimit`	**Field Type** int **Description** For internal use only.
`searchFilter`	**Field Type** string **Description** A comma-separated list of predefined filter conditions that are used to refine the scope of the search.
`searchRecordUniqueIdField`	**Field Type** string **Description** The field storing the unique identifier of a record displayed in the search results.
`searchResultSortBy`	**Field Type** string **Description** The values that are used to sort the search results.
`searchSequenceNumber`	**Field Type** int **Description** Required. The sequence in which the search is performed and the search result is displayed.
`searchType`	**Field Type** IdentityVerificationSearchType (enumeration of type string) **Description** Required. The type of search being performed. Valid values are: • `Object-Based` • `Text-Based`

IdentityVerificationProcFld

Represents a set of fields necessary to configure the questions that CCA asks the caller before providing them with the information they need.

Field Name	Description
customFieldLabel	**Field Type** string **Description** The custom label for the field that contains the verification data.
dataSourceType	**Field Type** IdentityVerificationProcFldDataSourceType (enumeration of type string) **Description** Required. The source type of the data. Valid values are: • External • Salesforce
developerName	**Field Type** string **Description** Required. The developer name of Identity Verification Process Field. 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. Available in API version 58.0 and later.
fieldDataType	**Field Type** IdentityVerificationProcFldFieldDataType (enumeration of type string) **Description** The data type of the field in the external data source that's defined in the identity verification process detail. Available in API version 58.0 and later. Valid values are: • address • checkbox • currency • dateonly • datetime • email • number • other • percent

Field Name	Description
	• `phone` • `picklist` • `reference` • `text` • `timeonly` • `url`
`fieldName`	**Field Type** string **Description** Required. The label of the field that contains the verification data based on the selected field type. Available in API version 58.0 and later.
`fieldType`	**Field Type** IdentityVerificationProcFldFieldType (enumeration of type string) **Description** Required. Indicates the type of field. Valid values are: • `additionalResultField` • `optionalVerifier` • `requiredVerifier` • `resultField` • `searchField` • `searchFilter`
`fieldValueFormula`	**Field Type** string **Description** Stores the formula that is applied to the field value.
`isActive`	**Field Type** boolean **Description** Indicates whether the record is active (`true`) or not (`false`).
`isManualInput`	**Field Type** boolean

Field Name	Description
	Description Indicates whether the user can manually enter the identity verification details (`true`) or not (`false`). The default value of this field is `false`. Available in API version 58.0 and later.
`masterLabel`	**Field Type** string **Description** Required. A user-friendly name for Identity Verification Process Field.
`sequenceNumber`	**Field Type** int **Description** Required. The sequence number of the field.

Declarative Metadata Sample Definition

This is an example of an IdentityVerificationProcDef component.

```
<?xml version="1.0" encoding="UTF-8"?>
<IdentityVerificationProcDef xmlns="http://soap.sforce.com/2006/04/metadata">
   <identityVerificationProcDtls>
      <fullName>Sample93AccountSearch</fullName>
      <dataSourceType>Salesforce</dataSourceType>
      <developerName>Sample93AccountSearch</developerName>
      <identityVerificationProcFlds>
         <fullName>Sample93AccountName</fullName>
         <dataSourceType>Salesforce</dataSourceType>
         <developerName>Sample93AccountName</developerName>
         <fieldName>Name</fieldName>
         <fieldType>requiredVerifier</fieldType>
         <isActive>false</isActive>
         <masterLabel>Sample93 Account Name</masterLabel>
         <fieldValueFormula>abcd</fieldValueFormula>
         <customFieldLabel>Name</customFieldLabel>
         <sequenceNumber>1</sequenceNumber>
         <isManualInput>false</isManualInput>
      </identityVerificationProcFlds>
      <identityVerificationProcFlds>
         <fullName>Sample93Phone</fullName>
         <dataSourceType>Salesforce</dataSourceType>
         <developerName>Sample93Phone</developerName>
```

```
        <fieldName>phone</fieldName>
        <fieldType>optionalVerifier</fieldType>
        <isActive>false</isActive>
        <masterLabel>Sample93 Phone</masterLabel>
        <sequenceNumber>93</sequenceNumber>
        <isManualInput>false</isManualInput>
    </identityVerificationProcFlds>
    <identityVerificationProcFlds>
        <fullName>Sample93PostalCode</fullName>
        <dataSourceType>Salesforce</dataSourceType>
        <developerName>Sample93PostalCode</developerName>
        <fieldName>BillingPostalCode</fieldName>
        <fieldType>optionalVerifier</fieldType>
        <isActive>true</isActive>
        <masterLabel>Sample93 Postal Code</masterLabel>
        <sequenceNumber>4</sequenceNumber>
        <isManualInput>false</isManualInput>
    </identityVerificationProcFlds>
    <identityVerificationProcFlds>
        <fullName>Sample93Account</fullName>
        <dataSourceType>Salesforce</dataSourceType>
        <developerName>Sample93Account</developerName>
        <fieldName>Name</fieldName>
        <fieldType>resultField</fieldType>
        <isActive>false</isActive>
        <masterLabel>Sample93 Account</masterLabel>
        <sequenceNumber>1</sequenceNumber>
        <isManualInput>false</isManualInput>
    </identityVerificationProcFlds>
    <isActive>true</isActive>
    <masterLabel>Sample93 Account Search</masterLabel>
    <objectName>Account</objectName>
    <searchRecordUniqueIdField>Id</searchRecordUniqueIdField>
    <searchSequenceNumber>1</searchSequenceNumber>
    <searchType>Text-Based</searchType>
    <searchResultSortBy>Name</searchResultSortBy>
    <optionalVerifiersMinVerfCount>1</optionalVerifiersMinVerfCount>
    <isRetryAllowedAfterLimit>false</isRetryAllowedAfterLimit>
    <retryLimit>5</retryLimit>
    <searchFilter></searchFilter>
    <displayRecordFieldName>LastModifiedById</displayRecordFieldName>
  </identityVerificationProcDtls>
  <masterLabel>Sample93 Verification Flow</masterLabel>
  <searchLayoutType>Tab</searchLayoutType>
</IdentityVerificationProcDef>
```

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

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

```
    <version>54.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Identity Verification Tooling API Objects

Use Tooling API objects to create and update identity verification configuration.

IdentityVerificationProcDef

Represents the definition of the identity verification process. This object is available in API version 54.0 and later.

IdentityVerificationProcDtl

Used to configure the search function as well as the minimum number of verifiers for the identity verification process. This object is available in API version 54.0 and later.

IdentityVerificationProcFld

Used to configure the questions or criteria for verifying the identity of a customer and their authorized representative. This object is available in API version 54.0 and later.

IdentityVerificationProcDef

Represents the definition of the identity verification process. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort

Field	Details
	Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is **Record Type Name**.This field is automatically generated, but you can supply your own value if you create the record using 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.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** The full name of the associated IdentityVerificationProcDef in Metadata API. The full name can include a namespaceprefix. 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`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The languages of the IdentityVerificationProcDef. 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

Field	Details
	• `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label for IdentityVerificationProcDef.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** The IdentityVerificationProcDef's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.

Field	Details
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • 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.
`SearchLayoutType`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The display layout of the search component. Possible values are: • `Stack` • `Tab` Note: As of API version 56.0, Tab isn't supported.

Usage

This object is used to build the verification context required to run the identity verification flows.

IdentityVerificationProcDtl

Used to configure the search function as well as the minimum number of verifiers for the identity verification process. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DataSourceType`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The source type of the data. Possible values are: • `External` • `Salesforce`
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is **Record Type Name**.This field is automatically generated, but you can supply your own value if you create the record using 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.
`DisplayRecordFieldName`	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description The name of the field that contains information about the record that's shown to the user after identity verification is successful. This field is available in API version 58.0 and later.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** The full name of the associated IdentityVerificationProcDtl in Metadata API. The full name can include a namespaceprefix. 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.
`IdentityVerificationProcDefId`	**Type** reference **Properties** Filter, Group, Sort **Description** The label of the relevant Identity Verification Process Definition record. This field is a relationship field. **Relationship Name** IdentityVerificationProcDef **Relationship Type** Lookup **Refers To** IdentityVerificationProcDef
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record is active (`true`) or not (`false`). The default value is `false`.
`Language`	**Type** picklist

Field	Details
	Properties Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The languages of the IdentityVerificationProcDtl. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`LinkedIdVerfProcessDetId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** Configure multiple levels of identity verification. For example, suppose you have two process detail records, Contact Process Detail and Account Process Detail, and Account Process Detail is linked to the contact process detail record. In this case, the contact process detail record is used for primary verification and the account process detail record is used for secondary verification. Then, if your business requirement is to configure a third-level verification process, create another process detail record and set the value of the `LinkedIdVerfProcessDetId` field in the account process detail record to the third process detail record. This field is available in API version 55.0 and later. This field is a relationship field.

Field	Details
	Relationship Name LinkedIdVerfProcessDet **Relationship Type** Lookup **Refers To** IdentityVerificationProcDtl
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label for IdentityVerificationProcDtl.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** The IdentityVerificationProcDtl's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.

Field	Details
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • 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.
`ObjectName`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The name of the object on which the search is performed and data is verified.
`OptionalVerifiersMinVerfCount`	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** The minimum number of additional verifiers that must be checked.
`SearchFilter`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Conditions to filter the search results. For example, if you want to perform the search only on Person Account records, enter `isPersonAccount = true`. Note: Use the `AND` operator to enter multiple conditions. The `OR` operator isn't supported.

Field	Details
`SearchRecordUniqueIdField`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The field storing the unique identifier of records displayed in the search results.
`SearchResultSortBy`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The values that are used to sort the search results. For example, if you want to sort the results by policy date, enter `PolicyDate__c Desc`.
`SearchSequenceNumber`	**Type** int **Properties** Filter, Group, Sort **Description** The sequence in which the search is performed and the search result is displayed.
`SearchType`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The type of search being performed. Possible values are: • `Object-Based` • `Text-Based` Text-based search enables users to enter search keywords in the search field. In object-based search, users search for data using available fields.

Usage

This object is used to build the verification context for the Verify Customer Identity and the Verify Customer Identity Base flows.

IdentityVerificationProcFld

Used to configure the questions or criteria for verifying the identity of a customer and their authorized representative. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`DataSourceType`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The source type of the data. Possible values are: • `External` • `Salesforce`
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Label is **Record Type Name**.This field is automatically generated, but you can supply your own value if you create the record using the API.

Field	Details
	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.
`FieldDataType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of data stored in an external data source field. Possible values are: • `address` • `checkbox` • `currency` • `dateonly` • `datetime` • `email` • `number` • `other` • `percent` • `phone` • `picklist` • `reference` • `text` • `timeonly` • `url`
`FieldName`	**Type** string **Properties** Filter, Group, Sort **Description** The label of the field that contains the verification data based on the selected field type.
`FieldType`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The type of field.

Field	Details
	Possible values are: • `additionalResultField`—Fetches data as part of the search query, but the data isn't displayed in search results. Suppose you want to fetch the policy number and the age of the policy owner as a result of the search but the agent isn't supposed to see this data. You can write custom logic to process this additional data. • `optionalVerifier`—Displays additional verifiers on the verification screen. Note: In API version 56.0 and later, you can display additional verifiers based on fields from the object configured for verification's parent object. For example, if you set identity verification on the Contact object, you can display fields from the Account object. • `requiredVerifier`—Displays required verifiers on the verification screen. Note: In API version 56.0 and later, you can display required verifiers based on fields from the object configured for verification's parent object. For example, if you set identity verification on the Contact object, you can display fields from the Account object. • `resultField`—Displays fields in search results. For example, when an agent searches for a customer or their representative, you'd like the search results to include the account name, phone number, and email ID. Note: In API version 56.0 and later, you can display fields from the parent object of the object configured for verification in the search results. For example, if you set identity verification on the Contact object, which looks up to the Account object, you can display fields from accounts in the search results. • `searchField`—Performs object-based search. • `searchFilter`—Filters search results. When this is set as the field type, specify the field name to filter search results using the FieldName attribute. Both static and dynamic filtering are supported. For example, to search for Contacts whose related Account ID is always 001xx000003GZ4IAAG, set AccountId as the field name and the value of FieldValueFormula to 001xx000003GZ4IAAG. Or, if an agent verifies a customer (Account) and then performs a secondary search against all policies (Policy) in which the verified customer is the policy holder, set FieldName to PolicyHolder and FieldValueFormula to the dynamic value {!SelectedParentRecordId}. This value is available from API version 56.0 and later. Note: You can only use record IDs to dynamically filter search results.
`FieldValueFormula`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Stores the formula that's applied to the field value.

Field	Details
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** The full name of the associated IdentityVerificationProcFld in Metadata API. The full name can include a namespaceprefix. 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.
`IdentityVerificationProcDtlId`	**Type** reference **Properties** Filter, Group, Sort **Description** The label of the relevant Identity Verification Process Detail record. This field is a relationship field. **Relationship Name** IdentityVerificationProcDtl **Relationship Type** Lookup **Refers To** IdentityVerificationProcDtl
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record is active (`true`) or not (`false`). The default value is `false`.
`IsManualInput`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the user can manually enter the identity verification details (`true`) or not (`false`). The default value is `false`.

Field	Details
	This field is available in API version 58.0 and later.
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The languages in which translation of record labels is supported. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed`

Field	Details
	• `installedEditable` • `released` • `unmanaged`
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** The label for IdentityVerificationProcFld.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** The IdentityVerificationProcFld's metadata. Query this field only if the query result contains no more than one record. Otherwise, an error is returned. If more than one record exists, use multiple queries to retrieve the records. This limit protects performance.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • In organizations that are not Developer Edition organizations, `NamespacePrefix` is only set for objects that are part of an installed managed package. There is no namespace prefix for all other objects.
`SequenceNumber`	**Type** int

Field	Details
	Properties Filter, Group, Sort **Description** The sequence number of the field.

CHAPTER 19 Intelligent Document Reader

In this chapter ...

- Intelligent Document Reader Standard Objects
- Apex Reference
- Intelligent Document Reader Business APIs
- OCR Metadata API Types
- OCR Tooling API Objects
- Intelligent Document Reader Standard Invocable Actions

Intelligent Document Reader provides optical character recognition to automatically extract data from external documents.

You specify the data's source form and then map the fields in the form to the equivalent fields in Salesforce. Use the extracted information to create or update record fields or to verify existing data. For example, check a birthdate in Salesforce against the birthdate in a scanned passport.

EDITIONS

Available in: Lightning Experience

Available in: View product and edition availability

Intelligent Document Reader Standard Objects

Use standard objects to create, update, and activate Intelligent Document Reader.

OcrDocumentScanResult

Represents the details of the information extracted from the document. This object is available in API version 55.0 and later.

OcrSampleDocument

Represents the details of a sample document or a document type that's used as a reference while extracting and mapping information from a customer document. This object is available in API version 55.0 and later.

OcrSampleDocumentField

Represents the details of the field in a document whose value is extracted and mapped to a Salesforce object field. This object is available in API version 55.0 and later.

OcrSampleDocumentPage

Represents the details of the fields that define a page in the OCR sample document. This object is available in API version 55.0 and later.

OcrSampleDocumentPageItem

Represents details of items present on an OCR sample document page. This object is available in API version 56.0 and later.

OcrTargetObject

Represents the details of the object to which information from a document is extracted and mapped. This object is available in API version 55.0 and later.

OcrTargetObjFieldMapping

Represents the details of how information from a documentdocument field is mapped to fields in an object. This object is available in API version 55.0 and later.

OcrTemplate

Represents the details of the mapping between the document and the Salesforce object using Intelligent Document Reader. This object is available in API version 55.0 and later.

OcrTemplateSampleDocument

Represents a relationship between an OCR template and an OCR sample document. This object is available in API version 55.0 and later.

Intelligent Document Reader Field on DocumentType

Standard and custom fields extend the standard DocumentType object for use in Intelligent Document Reader to represent information about document types for identity documents or other documents containing information that you want to extract.

OcrDocumentScanResult

Represents the details of the information extracted from the document. 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()`

Sharing Rule

The ContentDocument sharing rule is applicable to all the related OcrDocumentScanResult.

Users can access OcrDocumentScanResult only when you share the related ContentDocument.

Fields

Field	Details
`ContentDocumentId`	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the content document associated with the OCR document scan result. This field is a relationship field. **Relationship Name** ContentDocument **Relationship Type** Lookup **Refers To** ContentDocument
`ContentVersionId`	**Type** reference **Properties** Filter, Group, Sort **Description** ID of the content document associated with the OCR document scan result. This field is a relationship field. **Relationship Name** ContentDocument **Relationship Type** Lookup **Refers To** ContentDocument
DocumentTypeId	**Type** string **Properties** Create, Nillable, Update

Field	Details
	Description The document type of the OCRed document. It can be null if the document type for the associated Content Document is managed externally, such as through a Document Checklist Item. The document type is required when the document is specified as a blob or a URL.
`ErrorMessage`	**Type** textarea **Properties** Create, Nillable, Update **Description** The message with information about the failure of OCR API calls during extraction.
`ExtractedItemData`	**Type** textarea **Properties** Nillable **Description** A JSON string from the OCR service's response containing data extracted from items in the document. Available in API version 56.0 and later.
`ExtractedValues`	**Type** textarea **Properties** Nillable **Description** The information extracted from the document. This field is encryptable with Salesforce Platform Encryption.
`ExtractedRawData`	**Type** textarea **Properties** Nillable **Description** A JSON string from the OCR service response containing data extracted from the document in a raw format.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description The timestamp when the current user last accessed this record, a record related to this record, or a list view.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp when the current user last viewed this record or list view. If this value is null, the user might have only accessed this record or list view (`LastReferencedDate`) but not viewed it.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** Name of the OCR document scan result.
`OcrService`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The name of the OCR service that extracts information from the document and maps it to the Salesforce object. Possible values are: • `AMAZON_TEXTRACT` • `AMAZON_TEXTRACT_ANALYZED_ID`—Available in API version 57.0 and later. • PDF_DOCX_EXTRACT_TEXT
`OcrStatus`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Status of the extraction and mapping of information from the document field. Possible values are: • `ERROR` • `OCR_ENQUEUE`

Field	Details
	• SUCCESS
PageNumber	**Type** int **Properties** Create, Filter, Group, Nillable, Sort **Description** The number of the page in the document in which the extracted value is available.
Rotation	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** Angle of the document at which it's scanned.

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.

OcrDocumentScanResultFeed
Feed tracking is available for the object.

OcrDocumentScanResultHistory
History is available for tracked fields of the object.

OcrSampleDocument

Represents the details of a sample document or a document type that's used as a reference while extracting and mapping information from a customer document. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

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

Field	Details
	Description The application associated with the OCR sample document. Possible values are: • `EinsteinDocumentReader` • `Industries` The default value is `Industries`.
`ContentAssetId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the content asset associated with the OCR sample document. This field is a relationship field. **Relationship Name** ContentAsset **Relationship Type** Lookup **Refers To** ContentAsset
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance slows down while Salesforce generates one for each record.
`DocumentHeight`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update

Field	Details
	Description The normalized height of the document page assuming 1.0 as the fixed width for all the documents.
`DocumentSignature`	**Type** textarea **Properties** Create, Nillable, Update **Description** A signature created from the set of keys and their bounding boxes which uniquely identifies the document. This can be used to classify a given document in a user workflow into one of the several specific samples associated with a single template. Such classification is necessary for supporting key-less values in non-fixed documents.
`DocumentTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the document type associated with the OCR sample document. This field is a relationship field. **Relationship Name** DocumentType **Relationship Type** Lookup **Refers To** DocumentType
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The combined language and locale ISO code, which controls the language of the OCR sample document.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The label for the OCR sample document. This display value is the internal label that doesn't get translated.
`NamespacePrefix`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** For managed packages, this field is the namespace prefix assigned to the package. For unmanaged packages, this field is blank.

OcrSampleDocumentField

Represents the details of the field in a document whose value is extracted and mapped to a Salesforce object field. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`CellColumnNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The column number of the cell storing the OCR sample document field's value in the OCR sample document page item. Available in API version 56.0 and later.
`CellColumnSpanValue`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of columns that the cell storing the OCR sample document field's value must span. Available in API version 56.0 and later.

Field	Details
`CellRowNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The row number of the cell storing the OCR sample document field's value in the OCR sample document page item. Available in API version 56.0 and later.
`CellRowSpanValue`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of rows that the cell storing the OCR sample document field's value must span. Available in API version 56.0 and later.
`FieldLabelMaxX`	**Type** double **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A normalized coordinate representing the right edge of the bounding box of the key.
`FieldLabelMaxY`	**Type** double **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A normalized coordinate representing the bottom edge of the bounding box of the key.
`FieldLabelMinX`	**Type** double **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A normalized coordinate representing the left edge of the bounding box of the key.
`FieldLabelMinY`	**Type** double **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description A normalized coordinate representing the top edge of the bounding box of the key.
`FieldValueMaxY`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A normalized coordinate representing the bottom edge of the bounding box of the value.
`IsAutoExtracted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the OCR sample document field is auto-extracted by the OCR service (`true`) or not (`false`). Available in API version 57.0 and later. The default value is `false`.
`ItemType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of item associated with the OCR sample document field. Available in API version 56.0 and later. Possible value is `TABLE`.
`KeyContent`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Content in a particular area of the document.
`OcrSampleDocumentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the OCR sample document with the field. Available in API version 56.0 and later.

Field	Details
	This field is a relationship field. **Relationship Name** OcrSampleDocument **Relationship Type** Lookup **Refers To** OcrSampleDocument
`OcrSampleDocumentPageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the OCR sample document page on which the OCR sample document field is available. This field is a relationship field. **Relationship Name** OcrSampleDocumentPage **Relationship Type** Lookup **Refers To** OcrSampleDocumentPage
`OcrSampleDocumentPageItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the OCR sample document page item with the field. Available in API version 56.0 and later. This field is a relationship field. **Relationship Name** OcrSampleDocumentPageItem **Relationship Type** Lookup **Refers To** OcrSampleDocumentPageItem

OcrSampleDocumentPage

Represents the details of the fields that define a page in the OCR sample document. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`OcrSampleDocumentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the OCR sample document associated with the page. This is a relationship field. **Relationship Name** OcrSampleDocument **Relationship Type** Lookup **Refers To** OcrSampleDocument
`PageHeight`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The normalized height of the OCR sample document page.
`PageNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The page number of the page in the associated sample document.
`PageSignature`	**Type** textarea **Properties** Create, Nillable, Update **Description** The signature created from a collection of fields to identify the page in an OCR sample document.

OcrSampleDocumentPageItem

Represents details of items present on an OCR sample document page. This object is available in API version 56.0 and later.

Supported Calls

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

Fields

Field	Details
`HasHeader`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the OCR sample document page item has a header. The default value is `false`.
`OcrSampleDocumentPageId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the OCR sample document page associated with the page item. This field is a relationship field. **Relationship Name** OcrSampleDocumentPage **Relationship Type** Lookup **Refers To** OcrSampleDocumentPage
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The sequence number of the item on an OCR sample document page with multiple items.
`Title`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** Title of the OCR sample document page item.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of OCR sample document page item. Possible value is TABLE.

OcrTargetObject

Represents the details of the object to which information from a document is extracted and mapped. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`OcrTemplateId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the OCR template with the target object's fields mapped. This field is a relationship field. **Relationship Name** OcrTemplate **Relationship Type** Lookup **Refers To** OcrTemplate

Field	Details
`TargetObject`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The object to which information from a document is mapped.
`TargetObjectRecordType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The record type ID of the OCR target object. Available in API version 56.0 and later.

OcrTargetObjFieldMapping

Represents the details of how information from a documentdocument field is mapped to fields in an object. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the OCR target object field mapping is available for use. The default value is `false`.
`OcrSampleDocFieldId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the OCR sample document field associated with the field mapping.

Field	Details
	This field is a relationship field. **Relationship Name** OcrSampleDocField **Relationship Type** Lookup **Refers To** OcrSampleDocumentField
`OcrTargetObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the OCR target object associated with the field mapping. This field is a relationship field. **Relationship Name** OcrTargetObject **Relationship Type** Lookup **Refers To** OcrTargetObject
`TargetField`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The field of a target object's record, which is mapped to a document field to store the information extracted from that document field.
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of field mapping. Available in API version 56.0 and later. Possible values are: • `FormField` • `TableColumn` The default value is `FormField`.

OcrTemplate

Represents the details of the mapping between the document and the Salesforce object using Intelligent Document Reader. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The description of the OCR template. Available in API version 56.0 and later.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance slows down while Salesforce generates one for each record.
`DocumentTypeId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the document type associated with the OCR template. This field is a relationship field. **Relationship Name** DocumentType

Field	Details
	Relationship Type Lookup **Refers To** DocumentType
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the OCR template is active.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The combined language and locale ISO code, which controls the language of the OCR template.
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Label for the OCR target object. This display value is the internal label that doesn't get translated.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** For managed packages, this field is the namespace prefix assigned to the package. For unmanaged packages, this field is blank.
`PageCount`	**Type** int **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description Number of pages of the document, from the start of the document, from which information is extracted. If the document has lesser pages than this number, then information is extracted from all the pages of the document.
`TemplateName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Name of the OCR template.

OcrTemplateSampleDocument

Represents a relationship between an OCR template and an OCR sample document. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`OcrSampleDocumentId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the OCR sample document associated with the OCR template sample document. This field is a relationship field. **Relationship Name** OcrSampleDocument **Relationship Type** Lookup **Refers To** OcrSampleDocument
`OcrTemplateId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** ID of the OCR template associated with the OCR template sample document. This field is a relationship field. **Relationship Name** OcrTemplate **Relationship Type** Lookup **Refers To** OcrTemplate

Intelligent Document Reader Field on DocumentType

Standard and custom fields extend the standard DocumentType object for use in Intelligent Document Reader to represent information about document types for identity documents or other documents containing information that you want to extract.

Supported Calls

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

Fields

Field	Details
`FormType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The category of document that's extracted. The OCR service considers this type while extracting text from the document. Available in API version 57.0 and later. Possible values are: • `IDENTITY_DOCUMENT`—Identity Document • `USER_DEFINED_TYPE`—Other Forms

SEE ALSO:

Financial Services Cloud Developer Guide: DocumentType

Apex Reference

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

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

DocumentReader Namespace

The `DocumentReader` namespace contains classes for storing the output parameters of the Intelligent Document Reader flow actions. The Apex classes store text extracted from uploaded documents or based on one or more content document IDs and the active OCR template details.

DocumentReader Namespace

The `DocumentReader` namespace contains classes for storing the output parameters of the Intelligent Document Reader flow actions. The Apex classes store text extracted from uploaded documents or based on one or more content document IDs and the active OCR template details.

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

AdditionalField Class

This class contains the details of the fields that are created or updated in the target object.

AdditionalFields Class

This class contains a list of the fields of the target object.

ExtractedValue Class

This class contains the value extracted from the document and its confidence score.

KeyValue Class

This class contains the details of the key-value pairs present in the document.

OcrDocumentScanResult Class

This class contains the OCR document scan result. It stores the OCR Document Scan Result ID and the page number of the extracted text.

OcrDocumentScanResultDetail Class

This class contains the OCR document scan result details. It stores the OCR document scan result ID, key-value pairs present in the document, the page number of the extracted text, and status of the document scan result.

OcrDocumentScanResultDetailsList Class

This class contains the parameters for the output of the Fetch Extracted Text invocable action.

OcrDocumentScanResultsList Class

This class contains the parameters for the output of the Initiate Text Extraction invocable action.

OcrTargetObject Class

This class contains the details of the OCR target object that is associated with an OCR template.

OcrTemplate Class

This class contains the details of an OCR template.

OcrTemplatesList Class

This class contain the active OCR templates returned by the Fetch Active OCR Templates invocable action.

SEE ALSO:

Extend Your Industries Cloud with Common Features: Sample Flow to Extract and Store Text in Records

Extend Your Industries Cloud with Common Features: Flow Actions

AdditionalField Class

This class contains the details of the fields that are created or updated in the target object.

Namespace

documentreader

AdditionalField Properties

AdditionalField Properties

The following are properties for `AdditionalField`.

fieldName

The name of the field in the target object.

fieldValue

The value of the field in the target object.

`fieldName`

The name of the field in the target object.

Signature

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

Property Value

Type: String

`fieldValue`

The value of the field in the target object.

Signature

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

Property Value

Type: String

AdditionalFields Class

This class contains a list of the fields of the target object.

Namespace

documentreader

AdditionalFields Properties

AdditionalFields Properties

The following are properties for `AdditionalFields`.

additionalFields
List of the fields that are created or updated in the target object.

`additionalFields`

List of the fields that are created or updated in the target object.

Signature

```
public List<documentreader.AdditionalField> additionalFields {get; set;}
```

Property Value

Type: List<documentreader.AdditionalField>

ExtractedValue Class

This class contains the value extracted from the document and its confidence score.

Namespace

documentreader

ExtractedValue Properties

ExtractedValue Properties

The following are properties for `ExtractedValue`.

confidence
The confidence score for the extracted value.

value
The value extracted from the document.

`confidence`

The confidence score for the extracted value.

Signature

```
public Double confidence {get; set;}
```

Property Value

Type: Double

`value`

The value extracted from the document.

Signature

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

Property Value

Type: String

KeyValue Class

This class contains the details of the key-value pairs present in the document.

Namespace

documentreader

KeyValue Properties

KeyValue Properties

The following are properties for `KeyValue`.

key
The key present in a key-value pair.

value
The value present in a key-value pair.

key

The key present in a key-value pair.

Signature

```
public documentreader.ExtractedValue key {get; set;}
```

Property Value

Type: documentreader.ExtractedValue

value

The value present in a key-value pair.

Signature

```
public documentreader.ExtractedValue value {get; set;}
```

Property Value

Type: documentreader.ExtractedValue

OcrDocumentScanResult Class

This class contains the OCR document scan result. It stores the OCR Document Scan Result ID and the page number of the extracted text.

Namespace

documentreader

OcrDocumentScanResult Properties

OcrDocumentScanResult Properties

The following are properties for `OcrDocumentScanResult`.

ocrDocumentScanResultId
The ID of the OCR document scan result.

pageNumber
The page number of the document with which the OCR document scan result is associated.

ocrDocumentScanResultId

The ID of the OCR document scan result.

Signature

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

Property Value

Type: String

`pageNumber`

The page number of the document with which the OCR document scan result is associated.

Signature

```
public Integer pageNumber {get; set;}
```

Property Value

Type: Integer

OcrDocumentScanResultDetail Class

This class contains the OCR document scan result details. It stores the OCR document scan result ID, key-value pairs present in the document, the page number of the extracted text, and status of the document scan result.

Namespace

documentreader

OcrDocumentScanResultDetail Properties

OcrDocumentScanResultDetail Properties

The following are properties for `OcrDocumentScanResultDetail`.

keyValuePairs
The key-value pairs present in document.

ocrDocumentScanResultId
The ID of the OCR document scan result.

ocrService
The OCR service that's used for document scan result.

pageNumber
The page number of the document with which the OCR document scan result is associated.

status
The status of the OCR document scan result.

keyValuePairs

The key-value pairs present in document.

Signature

```
public List<documentreader.KeyValue> keyValuePairs {get; set;}
```

Property Value

Type: List<documentreader.KeyValue>

ocrDocumentScanResultId

The ID of the OCR document scan result.

Signature

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

Property Value

Type: String

ocrService

The OCR service that's used for document scan result.

Signature

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

Property Value

Type: String

pageNumber

The page number of the document with which the OCR document scan result is associated.

Signature

```
public Integer pageNumber {get; set;}
```

Property Value

Type: Integer

status

The status of the OCR document scan result.

Signature

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

Property Value

Type: String

OcrDocumentScanResultDetailsList Class

This class contains the parameters for the output of the Fetch Extracted Text invocable action.

Namespace

documentreader

OcrDocumentScanResultDetailsList Properties

OcrDocumentScanResultDetailsList Properties

The following are properties for `OcrDocumentScanResultDetailsList`.

ocrDocumentScanResultDetails
List of the OCR document scan result details.

`ocrDocumentScanResultDetails`

List of the OCR document scan result details.

Signature

```
public List<documentreader.OcrDocumentScanResultDetail> ocrDocumentScanResultDetails
{get; set;}
```

Property Value

Type: List<documentreader.OcrDocumentScanResultDetail>

OcrDocumentScanResultsList Class

This class contains the parameters for the output of the Initiate Text Extraction invocable action.

Namespace

documentreader

OcrDocumentScanResultsList Properties

OcrDocumentScanResultsList Properties

The following are properties for `OcrDocumentScanResultsList`.

ocrDocumentScanResults
List of the OCR document scan results.

`ocrDocumentScanResults`

List of the OCR document scan results.

Signature

```
public List<documentreader.OcrDocumentScanResult> ocrDocumentScanResults {get; set;}
```

Property Value

Type: List<documentreader.OcrDocumentScanResult>

OcrTargetObject Class

This class contains the details of the OCR target object that is associated with an OCR template.

Namespace

documentreader

OcrTargetObject Properties

OcrTargetObject Properties

The following are properties for `OcrTargetObject`.

ocrTargetObjectId
The ID of the OCR target object.

targetObject
The name of the target object to which information from a form is mapped.

targetObjectRecordType
The developer name of the record type.

`ocrTargetObjectId`

The ID of the OCR target object.

Signature

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

Property Value

Type: String

`targetObject`

The name of the target object to which information from a form is mapped.

Signature

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

Property Value

Type: String

`targetObjectRecordType`

The developer name of the record type.

Signature

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

Property Value

Type: String

OcrTemplate Class

This class contains the details of an OCR template.

Namespace

documentreader

OcrTemplate Properties

OcrTemplate Properties

The following are properties for `OcrTemplate`.

developerName
The API name of the OCR template.

documentTypeId
The ID of the document type associated with the OCR template.

name
The name of the OCR template.

ocrTargetObjects
The list of OCR target objects associated with the OCR template.

ocrTemplateId
The ID of the OCR template.

developerName

The API name of the OCR template.

Signature

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

Property Value

Type: String

documentTypeId

The ID of the document type associated with the OCR template.

Signature

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

Property Value

Type: String

name

The name of the OCR template.

Signature

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

Property Value

Type: String

ocrTargetObjects

The list of OCR target objects associated with the OCR template.

Signature

```
public List<documentreader.OcrTargetObject> ocrTargetObjects {get; set;}
```

Property Value

Type: List<documentreader.OcrTargetObject>

ocrTemplateId

The ID of the OCR template.

Signature

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

Property Value

Type: String

OcrTemplatesList Class

This class contain the active OCR templates returned by the Fetch Active OCR Templates invocable action.

Namespace

documentreader

OcrTemplatesList Properties

OcrTemplatesList Properties

The following are properties for `OcrTemplatesList`.

ocrTemplates
List of the OCR templates.

ocrTemplates

List of the OCR templates.

Signature

```
public List<documentreader.OcrTemplate> ocrTemplates {get; set;}
```

Property Value

Type: List<documentreader.OcrTemplate>

Intelligent Document Reader Business APIs

Use the Intelligent Document Reader Business APIs to read the mapping details of the extracted text that is stored in a Salesforce object. Intelligent Document Reader uses optical character recognition to automatically extract data from documents. You specify the kind of form you're getting data from, then map fields in the form to the appropriate fields in the Salesforce objects.

Available Resources

Resource	Description
`connect/form-reader/mapping`	Retrieve the mappings between the values of the keys extracted from the document to the Salesforce object fields with respect to a given template.
`/connect/form-reader/contentDocuments/${contentDocumentId}/ocrTemplates/${ocrTemplateId}/targetObjectFieldMappings`	Retrieve mapping between the values of the keys extracted from the document with respect to an OCR template.
`/connect/form-reader/ocrTemplates`	Retrieve a list of active OCR templates.
`/connect/form-reader/ocrTemplates/${ocrTemplateId}`	Retrieve the details of an active OCR template by the template ID.
`/connect/form-reader/contentDocuments/${contentDocumentId}/ocrDocumentScanResults`	Retrieve details of the extracted key-value pairs for a document from the latest version of the OCR document scan result. Create an OCR document scan result record using the extracted text from the latest version of a document.
`/connect/form-reader/contentDocuments/${contentDocumentId}/record`	Create records in Salesforce objects using a document based on a content document record.
`/connect/form-reader/contentDocuments/${contentDocumentId}/record/${targetRecordId}`	Update an existing record in a Salesforce object using a document based on a content document record.
`/connect/form-reader/receivedDocuments/${receivedDocumentId}/record`	Create records in Salesforce objects using a document based on a received document record.
`/connect/form-reader/receivedDocuments/${receivedDocumentId}/record/${targetRecordId}`	Update an existing record in a Salesforce object using a document based on a received document record.

REST Reference

You can access Intelligent Document Reader APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

REST Reference

You can access Intelligent Document Reader 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 Intelligent Document Reader API resources.

Request Bodies
Here's a list of Intelligent Document Reader API request bodies.

Response Bodies
Here's a list of Intelligent Document Reader API response bodies.

SEE ALSO:

Connect REST API Developer Guide

Resources

Here's a list of Intelligent Document Reader API resources.

Document Reader Mappings (POST)
Retrieve the mappings between the values of the keys extracted from the document to the Salesforce object fields with respect to a given template.

OCR Fields Mapping (GET)
Retrieve mapping between the values of the keys extracted from the document with respect to an OCR template.

OCR Text Extraction (GET, POST)
Retrieve details of the extracted key-value pairs for a document from the latest version of the OCR document scan result. Create an OCR document scan result record using the extracted text from the latest version of a document.

OCR Templates (GET)
Retrieve a list of active OCR templates. You can also fetch the OCR templates by document type and target object that are associated with the OCR templates.

OCR Template Details (GET)
Retrieve the details of an active OCR template by the template ID.

Record Creation with Content Documents
Create records in Salesforce objects using a document based on a content document record.

Record Creation with Received Documents
Create records in Salesforce objects using a document based on a received document record.

Record Update with Content Documents
Update an existing record in a Salesforce object using a document based on a content document record.

Record Update with Received Documents
Update an existing record in a Salesforce object using a document based on a received document record.

Document Reader Mappings (POST)

Retrieve the mappings between the values of the keys extracted from the document to the Salesforce object fields with respect to a given template.

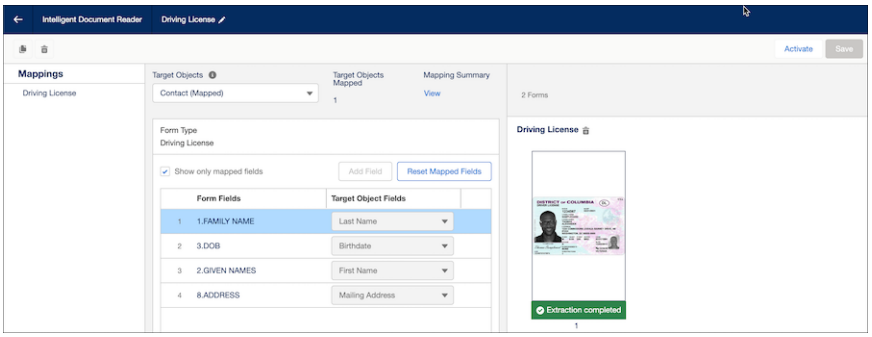
Permission

To use this resource, you must have the Intelligent Document Reader feature enabled in your Salesforce organization.

Usage

Use the corresponding template ID and the scan result ID for the OCR document scan result (ODSR) record of the document from which you want to fetch the values. Using the values from the document and field mapping from the template, you get the mapping between values and target field based on the key in both the document and template.

Here's a sample of how the Salesforce UI displays mapping of form types to objects:



Resource

```
/connect/form-reader/mapping
```

Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/mapping
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
   "scanResultId" : "0ixS7000000001TIAQ",
   "templateId" : "48tS70000004C9DIAU"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
isExactMatch	Boolean	Indicates whether the mapping between values and target field must be returned only when the key matches in both the document and template (`true`) or not (`false`). Default value is `true`.	Optional	55.0
`scanResultId`	String	The ID of the OCR document scan result. The scan result contains the contents of a document after optical character recognition (OCR) processing.	Required	55.0
`templateId`	String	The ID of the OCR template. This represents the details of the mapping between a document and a Salesforce object using Intelligent Document Reader.	Required	55.0

Response body for POST

Form Reader Map Output

SEE ALSO:

OcrDocumentScanResult

OcrTemplate

OCR Fields Mapping (GET)

Retrieve mapping between the values of the keys extracted from the document with respect to an OCR template.

Resource

```
/connect/form-reader/contentDocuments/${contentDocumentId}/ocrTemplates/${ocrTemplateId}/targetObjectFieldMappings
```

Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/form-reader/
contentDocuments/069RM0000001ex5YAA/ocrTemplates/48tRM0000004Ck9YAE/targetObjectFieldMappings
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`isExactMatch`	Boolean	Indicates whether the mapping between values and target field must be returned only when the key matches in both the document and template.	Optional	55.0

Response body for GET

Form Reader Map Output

OCR Text Extraction (GET, POST)

Retrieve details of the extracted key-value pairs for a document from the latest version of the OCR document scan result. Create an OCR document scan result record using the extracted text from the latest version of a document.

Resource

```
/connect/form-reader/contentDocuments/${contentDocumentId}/ocrDocumentScanResults
```

Examples for GET

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/contentDocuments/069RM0000001ex5YAA/ocrDocumentScanResults
```

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/contentDocuments/069RM0000001ex5YAA/ocrDocumentScanResults?startPageIndex=1
```

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/contentDocuments/069RM0000001ex5YAA/ocrDocumentScanResults?endPageIndex=1
```

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/contentDocuments/069RM0000001ex5YAA/ocrDocumentScanResults?startPageIndex=1&endPageIndex=1
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/contentDocuments/069RM0000001ex5YAA/ocrDocumentScanResults
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET, POST

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`endPageIndex`	Integer	Page number in the document to end extraction.	Optional	55.0
`isCalledFromInvocableAction`	Boolean	Indicates whether the Connect API was invoked from an invocable action (`true`) or not (`false`). The default value is `false`. Note: For internal use only.	Optional	58.0
`startPageIndex`	Integer	Page number in the document to start extraction.	Optional	55.0

Response body for GET

Document Extraction Output

Request body for POST

JSON examples

```
{

   "startPageIndex" : 4,
   "endPageIndex" : 4
}
```

```
{
   "startPageIndex" : 4
}
```

```
{
   "endPageIndex" : 4
}
```

```
{
   "ocrService" : "AMAZON_TEXTRACT_ANALYZED_ID"
}
```

```
{

   "startPageIndex" : 4,
   "endPageIndex" : 4,
   "ocrService" : "AMAZON_TEXTRACT_ANALYZED_ID"
}
```

Parameter Name	Type	Description	Required or Optional	Available Version
`endPageIndex`	Integer	Page number in the document to end extraction.	Optional	55.0
`ocrService`	String	Name of the service that gets the extraction results. Valid values are: • `AMAZON_TEXTRACT`—Indicates AWS Document service. • `AMAZON_TEXTRACT_ANALYZED_ID`—Indicates AWS Analyze ID service. The default value is `AMAZON_TEXTRACT`.	Optional	58.0
`startPageIndex`	Integer	Page number in the document to start extraction.	Optional	55.0

Response body for POST

Trigger Text Extraction Output

OCR Templates (GET)

Retrieve a list of active OCR templates. You can also fetch the OCR templates by document type and target object that are associated with the OCR templates.

Resource

```
/connect/form-reader/ocrTemplates
```

Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/ocrTemplates?documentTypeId=OdeRM00000000Dj
```

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/ocrTemplates?targetObjects=Account,BusinessMilestone
```

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/ocrTemplates?documentTypeId=OdeRM00000000Dj&targetObjects=Account.AccountRecordType1
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`documentTypeId`	String	ID of the document type associated with the OCR template.	Optional	55.0
`targetObjects`	String	List of the target object names associated with the OCR template. You can also specify a target object with record type.	Optional	55.0

Response body for GET

Template Collection Output

OCR Template Details (GET)

Retrieve the details of an active OCR template by the template ID.

Resource

```
/connect/form-reader/ocrTemplates/${ocrTemplateId}
```

Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/ocrTemplates/48tRM00000000YN
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Template Detail Output

Record Creation with Content Documents

Create records in Salesforce objects using a document based on a content document record.

Resource

```
/connect/form-reader/contentDocuments/${contentDocumentId}/record
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/contentDocuments/069xx0000004D1sAAE/record
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

`<DocumentProcessInput>`

JSON example for POST

```
{
  "objectApiName": "Account",
  "documentTypeId": "0dexx0000000001",
  "overrideConfidenceScoreThreshold": 50,
  "ignoreFieldValueConflict": false,
  "fieldsWithoutConflictList": {
    "noConflictFields": [
      {
        "field": "name"
      },
      {
        "field": "accountnumber"
      }
    ]
  },
  "additionalFields": {
    "additionalFieldMap": {
      "AccountNumber": "9090909"
    }
  }
  "templateApiName": "sample_template"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`additionalFields`	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Document Reader field mappings.	Optional	55.0
`attachDocument`	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`documentTypeId`	String	ID of the document type for the document checklist item.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
`fieldsWithoutConflictList`	Fields Without Conflict Input[]	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0
`ignoreFieldValueConflict`	Boolean	Indicates whether to ignore conflicts in OCR (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`linkedObjectId`	String	ID of the linked object record.	Optional	55.0
`objectApiName`	String	API name of the target object in which you want to create or update a record.	Optional	55.0
`overrideConfidenceScoreThreshold`	Integer	Conflict confidence score threshold value for the extracted value. Note: The value of this field overrides the confidence score threshold value set on the user interface.	Optional	55.0
`recordTypeId`	String	ID of the record type of the target object.	Optional	55.0
`templateApiName`	String	API name of the document template to retrieve.	Optional	59.0

Response body for POST

Document Process Output

Record Creation with Received Documents

Create records in Salesforce objects using a document based on a received document record.

Resource

```
/connect/form-reader/receivedDocuments/${receivedDocumentId}/record
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/receivedDocuments/0ioxx0000000001AAA/record
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

```
<DocumentProcessInput>
```

JSON example for POST

```
{
  "objectApiName": "Account",
  "documentTypeId": "0dexx0000000001",
  "overrideConfidenceScoreThreshold": 50,
  "ignoreFieldValueConflict": false,
  "fieldsWithoutConflictList": {
    "noConflictFields": [
      {
        "field": "name"
      },
      {
        "field": "accountnumber"
      }
    ]
  },
  "additionalFields": {
    "additionalFieldMap": {
      "AccountNumber": "9090909"
    }
  }
  "templateApiName": "sample_template"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`additionalFields`	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Document Reader field mappings.	Optional	55.0
`attachDocument`	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`documentTypeId`	String	ID of the document type for the document checklist item.	Optional	55.0
`fieldsWithoutConflictList`	Fields Without Conflict Input[]	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
`ignoreFieldValueConflict`	Boolean	Indicates whether to ignore conflicts in OCR (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`linkedObjectId`	String	ID of the linked object record.	Optional	55.0
`objectApiName`	String	API name of the target object in which you want to create or update a record.	Optional	55.0
`overrideConfidenceScoreThreshold`	Integer	Conflict confidence score threshold value for the extracted value. Note: The value of this field overrides the confidence score threshold value set on the user interface.	Optional	55.0
`recordTypeId`	String	ID of the record type of the target object.	Optional	55.0
`templateApiName`	String	API name of the document template to retrieve.	Optional	59.0

Response body for POST

Document Process Output

Record Update with Content Documents

Update an existing record in a Salesforce object using a document based on a content document record.

Resource

```
/connect/form-reader/contentDocuments/${contentDocumentId}/record/${targetRecordId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/contentDocuments/${contentDocumentId}/record/${targetRecordId}
```

Available version

55.0

Requires Chatter

No

HTTP methods

PATCH

Request body for PATCH

Root XML tag

```
<DocumentProcessInput>
```

JSON example for PATCH

```
{
  "documentTypeId": "0dexx0000000001",
  "overrideConfidenceScoreThreshold": 100,
  "ignoreFieldValueConflict": false,
  "attachDocument": true,
  "fieldsWithoutConflictList": {
    "noConflictFields": [
      {
        "field": "name"
      },
      {
        "field": "accountnumber"
      }
    ]
  }
  "templateApiName": "sample_template"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`additionalFields`	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Document Reader field mappings.	Optional	55.0
`attachDocument`	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`documentTypeId`	String	ID of the document type for the document checklist item.	Optional	55.0
`fieldsWithoutConflictList`	Fields Without Conflict Input[]	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0
`ignoreFieldValueConflict`	Boolean	Indicates whether to ignore conflicts in OCR (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`linkedObjectId`	String	ID of the linked object record.	Optional	55.0
`objectApiName`	String	API name of the target object in which you want to create or update a record.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
`overrideConfidenceScoreThreshold`	Integer	Conflict confidence score threshold value for the extracted value. Note: The value of this field overrides the confidence score threshold value set on the user interface.	Optional	55.0
`recordTypeId`	String	ID of the record type of the target object.	Optional	55.0
`templateApiName`	String	API name of the document template to retrieve.	Optional	59.0

Response body for PATCH

Document Process Output

Record Update with Received Documents

Update an existing record in a Salesforce object using a document based on a received document record.

Resource

```
/connect/form-reader/receivedDocuments/${receivedDocumentId}/record/${targetRecordId}
```

Resource Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/form-reader/receivedDocuments/0ioxx0000000001AAA/record/001xx000003GavnAAC
```

Available version

55.0

Requires Chatter

No

HTTP methods

PATCH

Request body for PATCH

Root XML tag

`<DocumentProcessInput>`

JSON example for POST

```
{
  "documentTypeId": "0dexx0000000001",
  "overrideConfidenceScoreThreshold": 100,
  "ignoreFieldValueConflict": false,
  "attachDocument": true,
  "fieldsWithoutConflictList": {
    "noConflictFields": [
      {
```

```
        "field": "name"
      },
      {
        "field": "accountnumber"
      }
    ]
  }
  "templateApiName": "sample_template"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`additionalFields`	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Document Reader field mappings.	Optional	55.0
`attachDocument`	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`documentTypeId`	String	ID of the document type for the document checklist item.	Optional	55.0
`fieldsWithoutConflictList`	Fields Without Conflict Input[]	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0
`ignoreFieldValueConflict`	Boolean	Indicates whether to ignore conflicts in OCR (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`linkedObjectId`	String	ID of the linked object record.	Optional	55.0
`objectApiName`	String	API name of the target object in which you want to create or update a record.	Optional	55.0
`overrideConfidenceScoreThreshold`	Integer	Conflict confidence score threshold value for the extracted value. Note: The value of this field overrides the confidence score threshold value set on the user interface.	Optional	55.0
`recordTypeId`	String	ID of the record type of the target object.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
templateApiName	String	API name of the document template to retrieve.	Optional	59.0

Response body for PATCH

Document Process Output

Request Bodies

Here's a list of Intelligent Document Reader API request bodies.

Document Process Input

Input representation of the content document or received document record to create or update a Salesforce object record.

Fields Without Conflict Input

Input representation of the list of fields without conflict for record creation.

Map Extracted Text Input

Input representation of the OCR document scan result and template that are required for mapping.

Document Process Input

Input representation of the content document or received document record to create or update a Salesforce object record.

Properties

Name	Type	Description	Required or Optional	Available Version
additionalFields	Map<String, Object>	List of additional fields that you want to create or update in the target object and which are not present in the Intelligent Document Reader field mappings.	Optional	55.0
attachDocument	Boolean	Indicates whether to automatically create the DocumentChecklistItem (DCI) and ContentDocumentLink records to link the document to the target object (true) or not (false). Default value is false.	Optional	55.0
documentTypeId	String	ID of the document type for the document checklist item.	Optional	55.0
fieldsWithoutConflictList	Fields Without Conflict Input[]	List of fields that must not have any conflicts for the record creation or update process.	Optional	55.0

Name	Type	Description	Required or Optional	Available Version
`ignoreFieldValueConflict`	Boolean	Indicates whether to ignore conflicts in OCR (`true`) or not (`false`). Default value is `false`.	Optional	55.0
`linkedObjectId`	String	ID of the linked object record.	Optional	55.0
`objectApiName`	String	API name of the target object in which you want to create or update a record.	Optional	55.0
`overrideConfidenceScoreThreshold`	Integer	Conflict confidence score threshold value for the extracted value. Note: The value of this field overrides the confidence score threshold value set on the user interface.	Optional	55.0
`recordTypeId`	String	ID of the record type of the target object.	Optional	55.0
`templateApiName`	String	API name of the document template to retrieve.	Optional	59.0

Fields Without Conflict Input

Input representation of the list of fields without conflict for record creation.

Root XML tag

```
<FieldsWithoutConflict>
```

Properties

Name	Type	Description	Required or Optional	Available Version
`field`	String	The name of the field.	Optional	55.0

Map Extracted Text Input

Input representation of the OCR document scan result and template that are required for mapping.

JSON example

```
{
   "scanResultId" : "0ixS7000000001TIAQ",
   "templateId" : "48tS70000004C9DIAU"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
isExactMatch	Boolean	Indicates whether the mapping between values and target field must be returned only when the key matches in both the document and template (`true`) or not (`false`). Default value is `true`.	Optional	55.0
`scanResultId`	String	The ID of the OCR document scan result. The scan result contains the contents of a document after optical character recognition (OCR) processing.	Required	55.0
`templateId`	String	The ID of the OCR template. This represents the details of the mapping between a document and a Salesforce object using Intelligent Document Reader.	Required	55.0

Response Bodies

Here's a list of Intelligent Document Reader API response bodies.

Document Extraction Output
Output representation of the status and details of the OCR document scan result.

Document Field
Output representation of a document field in an OCR template.

Document Conflict Field
Output representation of the target object field with conflict.

Document Conflict Field List
Output representation of the target object fields with conflicts.

Document Process Output
Output representation of the document process creation or update request.

Key Value Pair
Output representation of the key and value pair from the document extract.

Form Reader Map
Output representation of the mappings of the extracted text.

Form Reader Target Object Mappings
Output representation of the mappings between the text extracted by the document reader and the Salesforce object.

Form Reader Object Field Mapping
Output representation of the mapping between the extracted text values and the specific Salesforce object fields.

Object Field
Output representation of the target object field.

Object Field List
Output representation of the target object fields list.

OCR Document Scan Result
Output representation of the OCR document scan result ID.

OCR Document Scan Result Info
Output representation of the OCR document scan result.

OCR Document Scan Result
Output representation of the OCR document scan result ID.

OCR Document Scan Result List
Output representation of the list of the OCR document scan results IDs.

OCR SampleDocument
Output representation of the OCR sample document associated with the OCR template.

OCR Target Object
Output representation of the OCR target object.

OCR Target Object Field
Output representation of the OCR target object field.

OCR Target Object Field Mapping
Output representation of the OCR target object field mapping.

OCR Target Object Output
Output representation of the OCR target object.

OCR Template Output
Output representation of the details of an OCR template.

ODSR Detailed Output
Output representation of the OCR document scan result.

Template Collection Output
Output representation of a collection of OCR templates.

Template Detail
Output representation of details of the OCR template.

Template Detail Output
Output representation of the OCR template.

Trigger Text Extraction Output
Output representation of the text extraction request on the most recent version of the document.

Document Extraction Output

Output representation of the status and details of the OCR document scan result.

JSON example

```
{
  "ocrDocumentScanResults": [
```

```
{
  "keyValuePairs": [
    {
      "key": {
        "confidence": 23,
        "polygon": [
          {
            "xCoordinate": 0.6499073505401611,
            "yCoordinate": 0.8838216662406921
          },
          {
            "xCoordinate": 0.694475531578064,
            "yCoordinate": 0.8838216662406921
          },
          {
            "xCoordinate": 0.694475531578064,
            "yCoordinate": 0.8919549584388733
          },
          {
            "xCoordinate": 0.6499073505401611,
            "yCoordinate": 0.8919549584388733
          }
        ],
        "text": "Cat. No."
      },
      "value": {
        "confidence": 23,
        "polygon": [
          {
            "xCoordinate": 0.6966586112976074,
            "yCoordinate": 0.8839852809906006
          },
          {
            "xCoordinate": 0.7384559512138367,
            "yCoordinate": 0.8839852809906006
          },
          {
            "xCoordinate": 0.7384559512138367,
            "yCoordinate": 0.8920071125030518
          },
          {
            "xCoordinate": 0.6966586112976074,
            "yCoordinate": 0.8920071125030518
          }
        ],
        "text": "11862M"
      }
    }
  ],
  "ocrDocumentScanResultId": "0ixRM0000004DPl",
  "ocrService": "AMAZON_TEXTRACT",
  "pageNumber": 1,
  "status": "SUCCESS"
}
```

```
  ],
  "status": {
    "code": "SUCCESS",
    "message": "API call has been executed successfully."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
ocrDocumentScanResults	ODSR Detailed Output[]	Represents the details of the OCR document scan result.	Small, 55.0	55.0
status	Status	Indicates whether the request succeeded or failed, and in the case of failure, it also provides the reason.	Small, 55.0	55.0

Document Field

Output representation of a document field in an OCR template.

Property Name	Type	Description	Filter Group and Version	Available Version
fieldLabelMaxX	Double	Maximum x-coordinate of the bounding box.	Small, 55.0	55.0
fieldLabelMaxY	Double	Maximum y-coordinate of the bounding box	Small, 55.0	55.0
fieldLabelMinX	Double	Minimum x-coordinate of the bounding box	Small, 55.0	55.0
fieldLabelMinY	Double	Minimum y-coordinate of the bounding box	Small, 55.0	55.0
name	String	Name of the field	Small, 55.0	55.0
ocrSampleDocumentId	String	ID of the OCR sample document record.	Small, 55.0	55.0
pageNumber	Integer	Page number of the document on which this field is present.	Small, 55.0	55.0

Document Conflict Field

Output representation of the target object field with conflict.

Property Name	Type	Description	Filter Group and Version	Available Version
objectFieldName	String	The name of the field in the target object that has a conflict.	Small, 55.0	55.0

Document Conflict Field List

Output representation of the target object fields with conflicts.

Property Name	Type	Description	Filter Group and Version	Available Version
conflictFieldList	Document Conflict Field[]	Representation of the target object fields that have conflicts.	Small, 55.0	55.0

Document Process Output

Output representation of the document process creation or update request.

Response body example for POST

```
{
  "isSuccess": true,
  "message": "Account record was created.",
  "objectFieldList": {
    "objectFieldList": [
      {
        "fieldName": "Name",
        "fieldValue": "Robert Weber"
      },
      {
        "fieldName": "AccountNumber",
        "fieldValue": "1962550079"
      }
    ]
  },
  "ocrDocumentScanResultIdList": {
    "ocrDocumentScanResultIdList": [
      {
        "resultId": "0ixxx00000002t3AAA"
      }
    ]
  },
  "parentId": "001xx000003GeGFAA0"
}
```

Response body example for PATCH

```
{
  "isSuccess": true,
  "message": "Account record was updated.",
  "objectFieldList": {
    "objectFieldList": [
      {
        "fieldName": "Id",
        "fieldValue": "001xx000003GeGFAA0"
      },
      {
        "fieldName": "Name",
        "fieldValue": "Robert Weber"
```

```
      },
      {
        "fieldName": "AccountNumber",
        "fieldValue": "1962550079"
      }
    ]
  },
  "ocrDocumentScanResultIdList": {
    "ocrDocumentScanResultIdList": [
      {
        "resultId": "0ixxx00000002t3AAA"
      }
    ]
  },
  "parentId": "001xx000003GeGFAA0"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The code returned by the create or update API request.	Small, 55.0	55.0
conflictFieldList	Document Conflict Field List	The list of fields in the target object that have conflicts.	Small, 55.0	55.0
isSuccess	Boolean	Indicates whether the create or update request is successful (true) or not (false).	Small, 55.0	55.0
message	String	The message of the create or update API request.	Small, 55.0	55.0
objectFieldList	Object Field List	The list of fields that are created or updated in the target object record.	Small, 55.0	55.0
ocrDocumentScanResultIdList	OCR Document Scan Result List	The list of the OCR document scan result record IDs.	Small, 55.0	55.0
parentId	String	The ID of the target object in which the record is created or updated.	Small, 55.0	55.0

Key Value Pair

Output representation of the key and value pair from the document extract.

Property Name	Type	Description	Filter Group and Version	Available Version
key	ResultAttribute	Specifies the key present in a key-value pair.	Small, 55.0	55.0
value	ResultAttribute	Specifies the value present in a key-value pair.	Small, 55.0	55.0

Form Reader Map

Output representation of the mappings of the extracted text.

JSON example


```
{
  "formReaderTargetObjectMappings": [
    {
      "formReaderObjectFieldMapping": [
        {
          "confidence": 53.500003814697266,
          "pageNumber": 1,
          "targetFieldName": "CloseDate",
          "value": "700180537595"
        }
      ],
      "targetObjectName": "Opportunity"
    },
    {
      "formReaderObjectFieldMapping": [
        {
          "confidence": 99,
          "pageNumber": 1,
          "targetFieldName": "Origin",
          "value": "845-858-7612"
        },
        {
          "confidence": 99,
          "pageNumber": 1,
          "targetFieldName": "SuppliedEmail",
          "value": "845-858-7612"
        },
        {
          "confidence": 70,
          "pageNumber": 1,
          "targetFieldName": "Reason",
          "value": "XXX5230CSN:"
        },
        {
          "confidence": 86,
          "pageNumber": 1,
          "targetFieldName": "IsClosed",
          "value": "NY CDPHP MEDICAID HMO"
        },
        {
          "confidence": 82.5,
          "pageNumber": 2,
          "targetFieldName": "SuppliedEmail",
          "value": "914-443-8500 (Home) 914-443-8500 (Mobile)"
        }
      ],
      "targetObjectName": "Case"
    }
  ],
  "status": {
```

```
    "code": "SUCCESS",
    "message": "API call has been executed Successfully."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
formReaderTargetObjectMappings	Form Reader Target Object Mappings[]	List of mappings between the values of the keys extracted from the document to the Salesforce object fields for the given template.	Small, 55.0	55.0
status	Status	Indicates whether the request succeeded or failed, and also provides a message if there's failure.	Small, 55.0	55.0

Form Reader Target Object Mappings

Output representation of the mappings between the text extracted by the document reader and the Salesforce object.

Property Name	Type	Description	Filter Group and Version	Available Version
formReaderObjectFieldMapping	Form Reader Object Field Mapping[]	List of mappings between the extracted text values and the fields of the Salesforce object.	Small, 55.0	55.0
targetObjectName	String	Name of the target object to which mappings are done.	Small, 55.0	55.0
targetObjectRecordType	String	Developer name of the record type of the target object.	Small, 57.0	57.0

Form Reader Object Field Mapping

Output representation of the mapping between the extracted text values and the specific Salesforce object fields.

Property Name	Type	Description	Filter Group and Version	Available Version
confidence	Double	Confidence score for the extracted value.	Small, 55.0	55.0
pageNumber	Integer	Page number of the document corresponding to the ODSR record.	Small, 55.0	55.0
targetFieldName	String	Field name of the target object.	Small, 55.0	55.0
value	String	Value extracted from the form that is filled in the target field.	Small, 55.0	55.0

Object Field

Output representation of the target object field.

Property Name	Type	Description	Filter Group and Version	Available Version
fieldName	String	The name of the field in the target object.	Small, 55.0	55.0
fieldValue	Object	The value of the field.	Small, 55.0	55.0

Object Field List

Output representation of the target object fields list.

Property Name	Type	Description	Filter Group and Version	Available Version
objectFieldList	Object Field[]	Represents the fields that are created or updated in the Salesforce object.	Small, 55.0	55.0

OCR Document Scan Result

Output representation of the OCR document scan result ID.

Property Name	Type	Description	Filter Group and Version	Available Version
resultId	String	The ID of the OCR document scan result.	Small, 55.0	55.0

OCR Document Scan Result Info

Output representation of the OCR document scan result.

JSON example

```
"ocrDocumentScanResultInfos": [
  {
    "ocrDocumentScanResultId": "0ixRM0000004DY7",
    "pageNum": 1
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
ocrDocumentScanResultId	String	ID of the OCR document scan result record.	Small, 55.0	55.0
pageNum	Integer	Page number for the OCR document scan result.	Small, 55.0	55.0

OCR Document Scan Result

Output representation of the OCR document scan result ID.

Property Name	Type	Description	Filter Group and Version	Available Version
`resultId`	String	The ID of the OCR document scan result.	Small, 55.0	55.0

OCR Document Scan Result List

Output representation of the list of the OCR document scan results IDs.

Property Name	Type	Description	Filter Group and Version	Available Version
`ocrDocumentScanResultIdList`	OCR Document Scan Result[]	Represents the OCR document scan result IDs.	Small, 55.0	55.0

OCR SampleDocument

Output representation of the OCR sample document associated with the OCR template.

Property Name	Type	Description	Filter Group and Version	Available Version
`name`	String	Name of the OCR sample document.	Small, 55.0	55.0
`ocrSampleDocumentId`	String	ID of the OCR sample document.	Small, 55.0	55.0

OCR Target Object

Output representation of the OCR target object.

Property Name	Type	Description	Filter Group and Version	Available Version
`ocrTargetObjectId`	String	ID of the target object.	Small, 55.0	55.0
`targetObject`	String	Name of the target object to which information from a form is mapped.	Small, 55.0	55.0
`targetObjectRecordType`	String	Specifies the developer name of the record type. Note: To avoid potential issues with a template, don't deactivate, delete, or rename a record type if the record type is associated in a mapping.	Small, 56.0	56.0

OCR Target Object Field

Output representation of the OCR target object field.

Property Name	Type	Description	Filter Group and Version	Available Version
`targetObject`	String	Name of the target object to which information from a form is mapped.	Small, 55.0	55.0
`targetObjectField`	String	Name of the target object field to which value of a field from a form is mapped.	Small, 55.0	55.0
`targetObjectRecordType`	String	Specifies the developer name of the record type. Note: To avoid potential issues with a template, don't deactivate, delete, or rename a record type if the record type is associated in a mapping.	Small, 56.0	56.0

OCR Target Object Field Mapping

Output representation of the OCR target object field mapping.

Property Name	Type	Description	Filter Group and Version	Available Version
`documentField`	Document Field	Details of the field in a form whose value is extracted and mapped to a Salesforce object field.	Small, 55.0	55.0
`ocrTargetObjectFields`	OCR Target Object Field on page 1556[]	List of OCR target object fields in the OCR template.	Small, 55.0	55.0

OCR Target Object Output

Output representation of the OCR target object.

Property Name	Type	Description	Filter Group and Version	Available Version
`ocrTargetObjectId`	String	ID of the target object.	Small, 55.0	55.0
`targetObject`	String	Name of the target object to which information from a form is mapped.	Big, 55.0	55.0
`targetObjectRecordType`	String	Specifies the developer name of the record type. Note: To avoid potential issues with a template, don't deactivate, delete,	Small, 56.0	56.0

Property Name	Type	Description	Filter Group and Version	Available Version
		or rename a record type if the record type is associated in a mapping.		

OCR Template Output

Output representation of the details of an OCR template.

Property Name	Type	Description	Filter Group and Version	Available Version
`apiName`	String	Developer name of the OCR template.	Big, 55.0	55.0
`documentTypeId`	String	ID of the document type associated with the OCR template.	Big, 55.0	55.0
`name`	String	Name of the OCR template.	Big, 55.0	55.0
`ocrTargetObjects`	OCR Target Object Output[]	Details of the target objects.	Big, 55.0	55.0
`ocrTemplateId`	String	ID of the OCR template record.	Big, 55.0	55.0

ODSR Detailed Output

Output representation of the OCR document scan result.

Property Name	Type	Description	Filter Group and Version	Available Version
`keyValuePairs`	Key Value Pair[]	Represents the key-value pairs present in document.	Small, 55.0	55.0
`ocrDocumentScanResultId`	String	ID of the OCR document scan result.	Small, 55.0	55.0
`ocrService`	String	Name of the service that gets the extraction results. Valid values are: • `AMAZON_TEXTRACT`—Indicates AWS Document service. • `AMAZON_TEXTRACT_ANALYZED_ID`—Indicates AWS Analyze ID service. The default value is `AMAZON_TEXTRACT`.	Small, 58.0	58.0
`pageNumber`	Integer	Page number of the document with which the OCR document scan result is associated.	Small, 55.0	55.0
`status`	String	Status of the OCR document scan result.	Small, 55.0	55.0

Template Collection Output

Output representation of a collection of OCR templates.

JSON example

```
{
  "ocrTemplates": [
    {
      "apiName": "testtrim",
      "documentTypeId": "0deRM0000004CNZ",
      "name": "testtrim",
      "ocrTargetObjects": [
        {
          "ocrTargetObjectId": "97hRM0000004Cii",
          "targetObject": "Employee__c",
          "targetObjectRecordType" : null
        },
        {
          "ocrTargetObjectId": "97hRM00000000i1",
          "targetObject": "Account",
          "targetObjectRecordType" : "AccountRecordType1"
        }
      ],
      "ocrTemplateId": "48tRM00000000Yr"
    },
    {
      "apiName": "testemp",
      "documentTypeId": "0deRM00000000Dj",
      "name": "testemp",
      "ocrTargetObjects": [
        {
          "ocrTargetObjectId": "97hRM0000004ChL",
          "targetObject": "Account",
          "targetObjectRecordType" : "AccountRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM0000004Ckj",
          "targetObject": "Employee__c",
          "targetObjectRecordType" : null
        },
        {
          "ocrTargetObjectId": "97hRM00000000hD",
          "targetObject": "Contact",
          "targetObjectRecordType" : "ContactRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM00000000hE",
          "targetObject": "Lead",
          "targetObjectRecordType" : "LeadRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM00000000hF",
          "targetObject": "CareRequestItem",
          "targetObjectRecordType" : null
        },
```

```
        {
          "ocrTargetObjectId": "97hRM00000000hG",
          "targetObject": "Contract",
          "targetObjectRecordType" : "ContractRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM00000000hH",
          "targetObject": "Opportunity",
          "targetObjectRecordType" : "OpportunityRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM00000000hI",
          "targetObject": "CareDiagnosis",
          "targetObjectRecordType" : null
        }
      ],
      "ocrTemplateId": "48tRM0000004CjB"
    },
    {
      "apiName": "Ref123",
      "documentTypeId": "0deRM0000004CON",
      "name": "Ref123",
      "ocrTargetObjects": [
        {
          "ocrTargetObjectId": "97hRM0000004Cke",
          "targetObject": "Opportunity",
          "targetObjectRecordType" : "OpportunityRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM0000004Cka",
          "targetObject": "Account",
          "targetObjectRecordType" : "AccountRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM0000004Ckb",
          "targetObject": "Lead",
          "targetObjectRecordType" : "LeadRecordType1"
        },
        {
          "ocrTargetObjectId": "97hRM0000004CkZ",
          "targetObject": "Contact",
          "targetObjectRecordType" : "ContactRecordType1"
        }
      ],
      "ocrTemplateId": "48tRM0000004ClW"
    }
  ],
  "status": {
    "code": "SUCCESS",
    "message": "SUCCESS"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
ocrTemplates	OCR Template Output[]	List of the OCR templates.	Big, 55.0	55.0
status	Status	Indicates whether the request succeeded or failed, and in the case of failure, it also provides the reason.	Big, 55.0	55.0

Template Detail

Output representation of details of the OCR template.

Property Name	Type	Description	Filter Group and Version	Available Version
documentTypeId	String	ID of the document type associated with the OCR template.	Small, 55.0	55.0
name	String	Name of the OCR template.	Small, 55.0	55.0
ocrSampleDocuments	OCR Sample Document[]	List of OCR sample documents associated with the OCR template. Note: This is a sample document or a document type that's used as a reference while extracting and mapping information from a customer form.	Small, 55.0	55.0
ocrTargetObjectFieldMappings	OCR Target Object Field Mapping[]	List of OCR target object field mappings in the OCR template. Note: Specifies how information from a form field is mapped to fields in an object.	Small, 55.0	55.0
ocrTargetObjects	OCR Target Object[]	List of OCR target objects associated with the OCR template.	Small, 55.0	55.0
ocrTemplateId	String	ID of the OCR template.	Small, 55.0	55.0

Template Detail Output

Output representation of the OCR template.

JSON example

```
{
  "status": {
    "code": "SUCCESS",
    "message": "SUCCESS"
```

```
  },
  "templateDetail": {
    "documentTypeId": "0deRM0000004CNZ",
    "name": "testtrim",
    "ocrSampleDocuments": [
      {
        "name": "Passport",
        "ocrSampleDocumentId": "9QiRM00000000HH0AY"
      },
      {
        "name": "TrimChars1",
        "ocrSampleDocumentId": "9QiRM00000000J30AI"
      }
    ],
    "ocrTargetObjectFieldMappings": [
      {
        "documentField": {
          "fieldLabelMaxX": 0.38931194,
          "fieldLabelMaxY": 0.6017847,
          "fieldLabelMinX": 0.14168938,
          "fieldLabelMinY": 0.4804811,
          "name": "Place:",
          "ocrSampleDocumentId": "9QiRM00000000J30AI",
          "pageNumber": 1
        },
        "ocrTargetObjectFields": [
          {
            "targetObject": "Account",
            "targetObjectField": "Name",
            "targetObjectRecordType" : "AccountRecordType1"
          }
        ]
      },
      {
        "documentField": {
          "fieldLabelMaxX": 0.4520034,
          "fieldLabelMaxY": 0.24929473,
          "fieldLabelMinX": 0.1497066,
          "fieldLabelMinY": 0.13238272,
          "name": "*Name*:Rajiv",
          "ocrSampleDocumentId": "9QiRM00000000J30AI",
          "pageNumber": 1
        },
        "ocrTargetObjectFields": [
          {
            "targetObject": "Account",
            "targetObjectField": "Description",
            "targetObjectRecordType" : "AccountRecordType1"
          }
        ]
      },
      {
        "documentField": {
          "fieldLabelMaxX": 0.39928117,
```

```
          "fieldLabelMaxY": 0.8004167,
          "fieldLabelMinX": 0.14354157,
          "fieldLabelMinY": 0.64222884,
          "name": "Emp ID",
          "ocrSampleDocumentId": "9QiRM00000000J30AI",
          "pageNumber": 1
        },
        "ocrTargetObjectFields": [
          {
            "targetObject": "Account",
            "targetObjectField": "BillingPostalCode",
            "targetObjectRecordType" : "AccountRecordType1"
          },
          {
            "targetObject": "Employee__c",
            "targetObjectField": "Employee__c.Employee_ID__c",
            "targetObjectRecordType" : null
          }
        ]
      }
    ],
    "ocrTargetObjects": [
      {
        "ocrTargetObjectId": "97hRM0000004Cii",
        "targetObject": "Employee__c",
        "targetObjectRecordType" : null
      },
      {
        "ocrTargetObjectId": "97hRM00000000i1",
        "targetObject": "Account",
        "targetObjectRecordType" : "AccountRecordType1"
      }
    ],
    "ocrTemplateId": "48tRM00000000Yr"
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
status	Status	Indicates whether the request succeeded or failed, and in the case of failure, it also provides the reason.	Small, 55.0	55.0
templateDetail	Template Detail	Represents the details of the OCR template.	Small, 55.0	55.0

Trigger Text Extraction Output

Output representation of the text extraction request on the most recent version of the document.

JSON example

```
{
  "ocrDocumentScanResultInfos": [
```

```
    {
      "ocrDocumentScanResultId": "0ixRM0000004DY7",
      "pageNum": 1
    }
  ],
  "status": {
    "code": "SUCCESS",
    "message": "API call has been executed Successfully."
  }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
ocrDocumentScanResultInfos	OCR Document Scan Result Info[]	Represents the details of the OCR document scan result.	Small, 55.0	55.0
status	Status	Indicates whether the OCR document scan result record is created successfully or not.	Small, 55.0	55.0

OCR 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**.

Flow for Intelligent Document Reader
Represents the metadata associated with a flow. With a 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.

OcrSampleDocument
Represents the details of a sample document or a document type that's used as a reference while extracting and mapping information from a customer form.This type extends the Metadata metadata type and inherits its `fullName` field.

OcrTemplate
Represents the details of the mapping between a form and a Salesforce object using Intelligent Document Reader.This type extends the Metadata metadata type and inherits its `fullName` field.

Settings
Represents the organization settings to control the settings related to Intelligent Document Reader. For more information, see **Settings**.

Flow for Intelligent Document Reader

Represents the metadata associated with a flow. With a 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

Intelligent Document Reader exposes additional `actionType` values for the FlowActionCall metadata type. For more information on Flow and FlowActionCall metadata types, see Flow.

Field Name	Field Type	Description
`actionType`	InvocableActionType (enumeration of type string)	Required. The action type. Additional valid values only for Intelligent Document Reader include: • `fetchActiveOcrTemplates`—Fetch all the active OCR templates present in an org. Available in API version 58.0 and later. • `fetchExtractedText`—Fetch the text extracted from an uploaded document. Available in API version 58.0 and later. • `initiateTextExtraction`—Extract text from the pages of an uploaded document. Available in API version 58.0 and later.

OcrSampleDocument

Represents the details of a sample document or a document type that's used as a reference while extracting and mapping information from a customer form.This type extends the Metadata metadata type and inherits its `fullName` field.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

The OcrSampleDocument type doesn't need to represent a real sample document. It can also be an abstract document that represents all documents of the same DocumentType. In such cases, the `contentAsset` and `documentHeight` fields are null.

File Suffix and Directory Location

OcrSampleDocument components have the suffix `.ocrSampleDocument` and are stored in the `ocrSampleDocuments` folder.

Version

OcrTemplate components are available in API version 55.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the AWSTextract1000LimitAddOn or IntelligentDocumentReaderAddOn license.

Fields

Field Name	Field Type	Description
`contentAsset`	string	The ID of the OCR sample document asset. Note: This field is null if the OcrSampleDocument is an abstract document representing the DocumentType.

Field Name	Field Type	Description
documentHeight	double	The normalized height of the OCR sample document page. Note: This field is null if the OcrSampleDocument is an abstract document representing the DocumentType.
documentType	string	Required. The type of the OCR sample document.
masterLabel	string	Required. The label for the OCR sample document.
ocrSampleDocumentFields	OcrSampleDocumentField[]	The details of the field in a form whose value is extracted and mapped to a Salesforce object field.
ocrSampleDocumentPages	OcrSampleDocumentPage[]	A collection of fields that define a page in the OCR sample document.

OcrSampleDocumentField

Represents the details of the field in a form whose value is extracted and mapped to a Salesforce object field.

Table 1: Fields

Field Name	Field Type	Description
cellColumnNumber	int	The column number in the item with the cell storing this field's value. Available in API version 56.0 and later.
cellColumnSpanValue	int	The number of columns that span the cell storing this field's value. Available in API version 56.0 and later.
cellRowNumber	int	The row number in the item with the cell storing this field's value. Available in API version 56.0 and later.
cellRowSpanValue	int	The number of rows that span the cell storing this field's value. Available in API version 56.0 and later.
fieldLabelMaxX	double	A normalized coordinate representing the right edge of the bounding box of the key.
fieldLabelMaxY	double	A normalized coordinate representing the bottom edge of the bounding box of the key.
fieldLabelMinX	double	A normalized coordinate representing the left edge of the bounding box of the key.
fieldLabelMinY	double	A normalized coordinate representing the top edge of the bounding box of the key.
fieldValueName	string	Name of the referred field value. Available in API version 56.0 and later.
isAutoExtractedValue	boolean	Indicates whether the key is automatically extracted (true) or not (false). Available in API version 57.0 and later. Note: This field helps to distinguish auto-extracted keys from manual ones.

Field Name	Field Type	Description
keyContent	string	The content in a particular area of the form, representing the field that is extracted by OCR.
ocrSampleDocument	string	Required. The associated OCR sample document used as a reference while extracting and mapping information from a customer form.
ocrSampleDocumentPage	string	A reference to a page of the OCR sample document that contains the key. Note: This field is null if the OcrSampleDocument is an abstract document representing the DocumentType.
ocrSampleDocumentPageItem	OcrSampleDocumentPageItem[]	A reference to the item on the sample document page containing this field's value. Available in API version 56.0 and later.

OcrSampleDocumentPage

Represents a collection of fields that define a page in the OCR sample document. This type exists only if the OcrSampleDocument is a real sample document and not an abstract document representing the DocumentType.

Table 2: Fields

Field Name	Field Type	Description
ocrSampleDocument	string	Required. The associated OCR sample document used as a reference while extracting and mapping information from a customer form.
ocrSampleDocumentPageItems	OcrSampleDocumentPageItem[]	The collection of page items with the associated OCR sample document page. Available in API version 56.0 and later.
pageHeight	double	The normalized height of the OCR sample document page.
pageNumber	integer	Required. The page number of the page in the associated OCR sample document.

OcrSampleDocumentPageItem

Represents a foreign key reference to the item on the sample document page containing a value for the page item.

Table 3: Fields

Field Name	Field Type	Description
hasHeader	boolean	Indicates whether the OCR sample document page item has a header (`true`) or not (`false`). The default value is `false`. Available in API version 56.0 and later.
sequenceNumber	int	Required. The sequence number of the item on an OCR sample document page with multiple items. Available in API version 56.0 and later.
title	string	The title of the OCR sample document page item. Available in API version 56.0 and later.

Field Name	Field Type	Description
type	ItemType (enumeration of type string)	Required. Specifies the type of OCR sample document page item. Valid value is TABLE. Available in API version 56.0 and later.

Declarative Metadata Sample Definition

The following is an example of a OcrSampleDocument component.

```
<?xml version="1.0" encoding="UTF-8"?>
<OcrSampleDocument xmlns="http://soap.sforce.com/2006/04/metadata">
   <contentAsset>asset_01jpeg</contentAsset>
   <documentHeight>1.24</documentHeight>
   <documentType>Form</documentType>
   <masterLabel>Form</masterLabel>
   <ocrSampleDocumentFields>
   ...<cellColumnNumber>1</cellColumnNumber>
      <cellColumnSpanValue>1</cellColumnSpanValue>
      <cellRowNumber>1</cellRowNumber>
      <cellRowSpanValue>1</cellRowSpanValue>
      <fieldLabelMaxX>0.5975854</fieldLabelMaxX>
      <fieldLabelMaxY>0.46625894</fieldLabelMaxY>
      <fieldLabelMinX>0.5065626</fieldLabelMinX>
      <fieldLabelMinY>0.39605626</fieldLabelMinY>
      <keyContent>Last Name</keyContent>
     <ocrSampleDocument>image240</ocrSampleDocument>
     <ocrSampleDocumentPage>1</ocrSampleDocumentPage>
     <ocrSampleDocumentPageItem>
         <hasHeader>false</hasHeader>
         <sequenceNumber>1</sequenceNumber>
         <title>Table1</title>
         <type>TABLE</type>
     </ocrSampleDocumentPageItem>
   </ocrSampleDocumentFields>
   <ocrSampleDocumentPages>
      <ocrSampleDocument>Form</ocrSampleDocument>
      <pageHeight>1.0</pageHeight>
      <pageNumber>1</pageNumber>
   </ocrSampleDocumentPages>
   <ocrSampleDocumentPages>
      <ocrSampleDocument>Form</ocrSampleDocument>
      <pageNumber>2</pageNumber>
   </ocrSampleDocumentPages>
</OcrSampleDocument>
```

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

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

```
      <members>*</members>
      <name>DocumentType</name>
   </types>
   <types>
      <members>*</members>
      <name>ContentAsset</name>
   </types>
   <types>
      <members>*</members>
      <name>OcrSampleDocument</name>
   </types>
   <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

OcrTemplate

Represents the details of the mapping between a form and a Salesforce object using Intelligent Document Reader.This type extends the Metadata metadata type and inherits its `fullName` field.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

File Suffix and Directory Location

OcrTemplate components have the suffix `.ocrTemplate` and are stored in the `ocrTemplates` folder.

Version

OcrTemplate components are available in API version 55.0 and later.

Special Access Rules

To use this metadata type, your Salesforce org must have the AWSTextract1000LimitAddOn or IntelligentDocumentReaderAddOn license.

Fields

Field Name	Field Type	Description
`active`	boolean	Indicates whether the OCR template is active (`true`) or not (`false`).
`description`	string	The description of the OCR template.
`documentType`	string	Required. The document type for which this template defines mappings.
`masterLabel`	string	Required. The label for the OCR template.

Field Name	Field Type	Description
ocrTargetObjects	OcrTargetObject[]	Represents the details of the object to which information from a form is extracted and mapped.
ocrTemplateSampleDocuments	OcrTemplateSampleDocument[]	Represents the details of a sample document or a document type that's used as a reference while extracting and mapping information from a customer form.
pageCount	integer	The number of pages in the form from which information is extracted.
templateName	string	Required. The name of the OCR template.

OcrTargetObject

Represents the details of the object to which information from a form is extracted and mapped.

Table 4: Fields

Field Name	Field Type	Description
ocrTargetObjectFieldMappings	OcrTargetObjFieldMapping[]	Represents the details of how information from a form field is mapped to fields in an object.
targetObject	string	Required. The object to which information from a form is mapped.
targetObjectRecordType	string	The developer name of the record type of the target object. Available in API version 56.0 and later.

OcrTargetObjFieldMapping

Represents the details of how information from a form field is mapped to fields in an object.

Table 5: Fields

Field Name	Field Type	Description
ocrSampleDocField	OcrSampleDocumentField[]	The details of the field in a form whose value is extracted and mapped to a Salesforce object field.
targetField	string	Required. The field to which information is mapped.
type	OcrMappingType (enumeration of type string)	Required. Specifies the type of mapping. Available in API version 56.0 and later. Valid values are: • FormField • TableColumn The default value is FormField.

OcrSampleDocumentField

Represents the details of the field in a form whose value is extracted and mapped to a Salesforce object field.

Table 6: Fields

Field Name	Field Type	Description
`cellColumnNumber`	int	The column number in the item with the cell storing this field's value. Available in API version 56.0 and later.
`cellColumnSpanValue`	int	The number of columns that span the cell storing this field's value. Available in API version 56.0 and later.
`cellRowNumber`	int	The row number in the item with the cell storing this field's value. Available in API version 56.0 and later.
`cellRowSpanValue`	int	The number of rows that span the cell storing this field's value. Available in API version 56.0 and later.
`fieldLabelMaxX`	double	A normalized coordinate representing the right edge of the bounding box of the key.
`fieldLabelMaxY`	double	A normalized coordinate representing the bottom edge of the bounding box of the key.
`fieldLabelMinX`	double	A normalized coordinate representing the left edge of the bounding box of the key.
`fieldLabelMinY`	double	A normalized coordinate representing the top edge of the bounding box of the key.
`fieldValueName`	string	The name of the referred field value. Available in API version 56.0 and later.
`keyContent`	string	The content in a particular area of the form, representing the field that is extracted by OCR.
`ocrSampleDocument`	string	Required. The associated OCR sample document used as a reference while extracting and mapping information from a customer form.
`ocrSampleDocumentPage`	string	A collection of fields that define a page in the OCR sample document.
`ocrSampleDocumentPageItem`	OcrSampleDocumentPageItem[]	A reference to the item on the sample document page containing this field's value. Available in API version 56.0 and later.

OcrSampleDocumentPageItem

Represents a foreign key reference to the item on the sample document page containing a value for the page item.

Table 7: Fields

Field Name	Field Type	Description
`hasHeader`	boolean	Indicates whether the OCR sample document page item has a header (`true`) or not (`false`). The default value is `false`. Available in API version 56.0 and later.
`sequenceNumber`	int	Required. The sequence number of the item on an OCR sample document page with multiple items. Available in API version 56.0 and later.

Field Name	Field Type	Description
title	string	The title of the OCR sample document page item. Available in API version 56.0 and later.
type	ItemType (enumeration of type string)	Required. Specifies the type of OCR sample document page item. Valid value is TABLE. Available in API version 56.0 and later.

OcrTemplateSampleDocument

Represents the details of a sample document or a document type that's used as a reference while extracting and mapping information from a customer form.

Table 8: Fields

Field Name	Field Type	Description
ocrSampleDocument	string	The associated OCR sample document used as a reference while extracting and mapping information from a customer form.

Declarative Metadata Sample Definition

The following is an example of a OcrTemplate component.

```
<?xml version="1.0" encoding="UTF-8"?>
<OcrTemplate xmlns="http://soap.sforce.com/2006/04/metadata">
   <active>false</active>
   <documentType>Form</documentType>
   <masterLabel>Form Test 222</masterLabel>
   <ocrTargetObjects>
      <ocrTargetObjFieldMappings>
         <ocrSampleDocField>
            <cellColumnNumber>1</cellColumnNumber>
            <cellColumnSpanValue>1</cellColumnSpanValue>
            <cellRowNumber>1</cellRowNumber>
            <cellRowSpanValue>1</cellRowSpanValue>
             <fieldLabelMaxX>0.5975854</fieldLabelMaxX>
             <fieldLabelMaxY>0.46625894</fieldLabelMaxY>
             <fieldLabelMinX>0.5065626</fieldLabelMinX>
             <fieldLabelMinY>0.39605626</fieldLabelMinY>
             <keyContent>Last Name</keyContent>
             <ocrSampleDocument>image240</ocrSampleDocument>
             <ocrSampleDocumentPage>1</ocrSampleDocumentPage>
             <ocrSampleDocumentPageItem>
                <hasHeader>false</hasHeader>
                <sequenceNumber>1</sequenceNumber>
                <title>Table1</title>
                <type>TABLE</type>
            </ocrSampleDocumentPageItem>
        </ocrSampleDocField>
```

```
      <targetField>Account.Name</targetField>
      <type>TableColumn</type>
      </ocrTargetObjFieldMappings>
      <targetObject>Account</targetObject>
      <targetObjectRecordType>Account.X240</targetObjectRecordType>
   </ocrTargetObjects>
   <ocrTemplateSampleDocuments>
      <ocrSampleDocument>Form</ocrSampleDocument>
   </ocrTemplateSampleDocuments>
   <pageCount>10</pageCount>
   <templateName>Form Test</templateName>
</OcrTemplate>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
   <types>
      <members>*</members>
      <name>OcrTemplate</name>
   </types>
   <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Settings

Represents the organization settings to control the settings related to Intelligent Document Reader. For more information, see **Settings**.

IndustriesEinsteinFeatureSettings
Represents the settings for enabling the Industries Einstein feature.

IndustriesEinsteinFeatureSettings

Represents the settings for enabling the Industries Einstein feature.

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

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

File Suffix and Directory Location

IndustriesEinsteinFeatureSettings values are stored in a single file named `IndustriesEinsteinFeature.settings` in the `settings` folder. The `.settings` files are different from other named components because there's only one settings file for each settings component.

Version

IndustriesEinsteinFeatureSettings components are available in API version 57.0 and later.

Fields

Field Name	Description
`documentReaderConfidenceOrgValue`	**Field Type** double **Description** Required. Specify the confidence score threshold to indicate the reliability of data in a document. You can enter a number from 0 to 100, with up to two decimal places, where 0 is the least confident and 100 is the most confident.

Declarative Metadata Sample Definition

The following is an example of a IndustriesEinsteinFeatureSettings component.

```
<?xml version="1.0" encoding="UTF-8"?>
<IndustriesEinsteinFeatureSettings xmlns="http://soap.sforce.com/2006/04/metadata">
   <documentReaderConfidenceOrgValue>61</documentReaderConfidenceOrgValue>
</IndustriesEinsteinFeatureSettings>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
  <types>
    <members>IndustriesEinsteinFeature</members>
    <name>Settings</name>
  </types>
  <version>63.0</version>
</Package>
```

Wildcard Support in the Manifest File

The wildcard character `*` (asterisk) in the `package.xml` manifest file doesn't apply to metadata types for feature settings. The wildcard applies only when retrieving all settings, not for an individual setting. For details, see Settings. For information about using the manifest file, see Deploying and Retrieving Metadata with the Zip File.

SEE ALSO:

Extend Your Industries Cloud with Common Features: Configure Global Content Extraction Settings

OCR 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**.

OcrSampleDocument

Represents the details of a sample document or a document type that's used as a reference while extracting and mapping information from a customer document. This object is available in API version 55.0 and later.

OcrSampleDocumentField

Represents the details of the field in a document whose value is extracted and mapped to a Salesforce object field. This object is available in API version 55.0 and later.

OcrSampleDocumentPage

Represents a collection of fields that define a page in the OCR sample document. This object is available in API version 55.0 and later.

OcrSampleDocumentPageItem

Represents details of items present on an OCR sample document page. This object is available in API version 56.0 and later.

OcrTargetObject

Represents the details of the object to which information from a document is extracted and mapped. This object is available in API version 55.0 and later.

OcrTargetObjFieldMapping

Represents the details of how information from a document field is mapped to fields in an object. This object is available in API version 55.0 and later.

OcrTemplate

Represents the details of the mapping between a document and a Salesforce object using Intelligent Document Reader. This object is available in API version 55.0 and later.

OcrTemplateSampleDocument

Represents a relationship between an OCR template and an OCR sample document. This object is available in API version 55.0 and later.

OcrSampleDocument

Represents the details of a sample document or a document type that's used as a reference while extracting and mapping information from a customer document. This object is available in API version 55.0 and later.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

To use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

Fields

Field	Details
`ApplicationType`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The application associated with the OCR sample document. Possible values are: • `EinsteinDocumentReader` • `Industries`
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance slows down while Salesforce generates one for each record.
`DocumentHeight`	**Type** double **Properties** Filter, Nillable, Sort **Description** Normalized height of the OCR sample document page.
`FullName`	**Type** string **Properties** Create, Group, Nillable

Field	Details
	Description Full name of the associated metadata 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`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Language of the OCR sample document.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label of the OCR sample document.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update

Field	Details
	Description OCR sample document metadata.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.

OcrSampleDocumentField

Represents the details of the field in a document whose value is extracted and mapped to a Salesforce object field. This object is available in API version 55.0 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 use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

Fields

Field	Details
`CellColumnNumber`	**Type** int **Properties** Create, Filter, Group, in Nillable, Sort, Update **Description** The column number of the cell storing the OCR sample document field's value in the OCR sample document page item. Available in API version 56.0 and later.
`CellColumnSpanValue`	**Type** int

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** The number of columns that the cell storing the OCR sample document field's value must span. Available in API version 56.0 and later.
`CellRowNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The row number of the cell storing the OCR sample document field's value in the OCR sample document page item. Available in API version 56.0 and later.
`CellRowSpanValue`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The number of rows that the cell storing the OCR sample document field's value must span. Available in API version 56.0 and later.
`FieldLabelMaxX`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A normalized coordinate representing the right edge of the bounding box of the key.
`FieldLabelMaxY`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A normalized coordinate representing the bottom edge of the bounding box of the key.
`FieldLabelMinX`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A normalized coordinate representing the left edge of the bounding box of the key.

Field	Details
`FieldLabelMinY`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** A normalized coordinate representing the top edge of the bounding box of the key.
`IsAutoExtracted`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the OCR sample document field is auto-extracted by the OCR service (`true`) or not (`false`). Available in API version 57.0 and later. The default value is `false`.
`ItemType`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** The type of item associated with the OCR sample document field. Available in API version 56.0 and later. Possible value is `TABLE`.
`KeyContent`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Content in a particular area of the document.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted

Field	Details
	• `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`OcrSampleDocumentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the associated OCR sample document. This is a relationship field. **Relationship Name** OcrSampleDocument **Relationship Type** Lookup **Refers To** OcrSampleDocument
`OcrSampleDocumentPageId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the associated OCR sample document page. This is a relationship field. **Relationship Name** OcrSampleDocumentPage **Relationship Type** Lookup **Refers To** OcrSampleDocumentPage
`OcrSampleDocumentPageItemId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The ID of the OCR sample document page item with the field. Available in API version 56.0 and later. This is a relationship field. **Relationship Name** OcrSampleDocumentPageItem **Relationship Type** Lookup **Refers To** OcrSampleDocumentPageItem

OcrSampleDocumentPage

Represents a collection of fields that define a page in the OCR sample document. This object is available in API version 55.0 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 use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

Fields

Field	Details
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated

Field	Details
	• `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`OcrSampleDocumentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the OCR sample document. This is a relationship field. **Relationship Name** OcrSampleDocument **Relationship Type** Lookup **Refers To** OcrSampleDocument
`PageHeight`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** Normalized height of the OCR sample document page.
`PageNumber`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Page number of the page in the associated OCR sample document.

OcrSampleDocumentPageItem

Represents details of items present on an OCR sample document page. This object is available in API version 56.0 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 use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

Fields

Field	Details
`HasHeader`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the OCR sample document page item has a header. The default value is `false`.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`OcrSampleDocumentPageId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the OCR sample document page associated with the page item. This field is a relationship field.

Field	Details
	Relationship Name OcrSampleDocumentPage **Relationship Type** Lookup **Refers To** OcrSampleDocumentPage
`SequenceNumber`	**Type** int **Properties** Create, Filter, Group, Sort, Update **Description** The sequence number of the item on an OCR sample document page with multiple items.
`Title`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Title of the OCR sample document page item.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of OCR sample document page item. Possible values is `TABLE`.

OcrTargetObject

Represents the details of the object to which information from a document is extracted and mapped. This object is available in API version 55.0 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 use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

Fields

Field	Details
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`OcrTemplateId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the associated OCR template. This is a relationship field. **Relationship Name** OcrTemplate **Relationship Type** Lookup **Refers To** OcrTemplate
`TargetObject`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update

Field	Details
	Description The object to which information from a document is mapped. The possible values have only a representative list of objects. The exact list of supported objects depends on the license configuration in the org.
`TargetObjectRecordType`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The record type of the target object to which information from a document is mapped. This field is available in API version 56.0 and later.

OcrTargetObjFieldMapping

Represents the details of how information from a document field is mapped to fields in an object. This object is available in API version 55.0 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 use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

Fields

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates if the OCR target object field mapping is available for use. The default value is `false`.

Field	Details
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`OcrSampleDocFieldId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** ID of the associated OCR sample document field. This is a relationship field. **Relationship Name** OcrSampleDocField **Relationship Type** Lookup **Refers To** OcrSampleDocumentField
`OcrTargetObjectId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the target object. This is a relationship field. **Relationship Name** OcrTargetObject

Field	Details
	Relationship Type Lookup **Refers To** OcrTargetObject
`TargetField`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Field to which information is mapped. The possible values depend on the license configuration in the org. The supported fields are those belonging to the objects that are available in the `TargetObject` field of OcrTargetObject. Not all fields of these supported objects are available for mapping.
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of field mapping.. Available in API version 56.0 and later. Possible values are: • `FormField` • `TableColumn` The default value is `FormField`.

OcrTemplate

Represents the details of the mapping between a document and a Salesforce object using Intelligent Document Reader. This object is available in API version 55.0 and later.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

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

Supported REST API Methods

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

Special Access Rules

To use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

Fields

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

Field	Details
	Description Indicates whether this OCR template is active (`true`) or not (`false`).
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Language of the OCR template.
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, Sort **Description** Label of the optical character reader (OCR) template.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** OCR template metadata.

Field	Details
NamespacePrefix	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.
PageCount	**Type** int **Properties** Filter, Group, Nillable, Sort **Description** Number of pages in the document from which information is extracted.
TemplateName	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Name of the OCR template.

OcrTemplateSampleDocument

Represents a relationship between an OCR template and an OCR sample document. This object is available in API version 55.0 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 use this tooling API object, your Salesforce org must have the AWSTextract1000LimitAddOn license.

Fields

Field	Details
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`OcrSampleDocumentId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** ID of the associated OCR sample document. This is a relationship field. **Relationship Name** OcrSampleDocument **Relationship Type** Lookup **Refers To** OcrSampleDocument
`OcrTemplateId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** ID of the associated OCR template. This is a relationship field.

Field	Details
	Relationship Name OcrTemplate **Relationship Type** Lookup **Refers To** OcrTemplate

Intelligent Document Reader Standard Invocable Actions

Intelligent Document Reader detects and extracts text from a document using the Amazon Textract API, which is based on optical character recognition. With the standard invocable actions, you can automate the text extraction process, which includes detecting and extracting the text, fetching the extracted text, and selecting an OCR template for the extracted text.

SEE ALSO

REST API Developer Guide

Actions Developer Guide

Fetch Active OCR Templates Action
Fetch all the active OCR templates in an org.

Fetch Extracted Text Action
Fetch the text extracted from an uploaded document.

Initiate Text Extraction Action
Extract text from an uploaded document by using the Amazon Textract API.

Fetch Active OCR Templates Action

Fetch all the active OCR templates in an org.

Use this action to automate OCR template selection for the text extracted from an uploaded document.

Special Access Rules

This action is available in API version 58.0 and later for users with the AWSTextract1000LimitAddOn or IntelligentDocumentReaderAddOn license.

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/fetchActiveOcrTemplates`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Inputs

Input	Details
`documentTypeId`	**Type** string **Description** Optional. The ID of the document type associated with the OCR template. Note: You can specify up to 20 document type IDs.
`targetObjects`	**Type** string **Description** Optional. The comma-separated list of target object API names associated with the OCR template.

Outputs

Output	Details
`ocrTemplates`	**Type** string **Description** The comma-separated list of OCR template records that match the specified document type ID and target objects.

Example

Sample Request

```
{
   "inputs":[
      {
         "documentTypeId":"0deT10000004CCbIAM,0ghT11000004CCbIF",
         "targetObjects":"Account,Contact"
      }
   ]
}
```

Sample Response


```
[
   {
      "actionName":"fetchActiveOcrTemplates",
      "errors":null,
      "isSuccess":true,
      "outputValues":{
         "ocrTemplates":{
            "ocrTemplates":[
               {
                  "ocrTemplateId":"48tT1000000004IIAQ",
                  "ocrTargetObjects":[
                     {
                        "targetObjectRecordType":null,
                        "targetObject":"Account",
                        "ocrTargetObjectId":"97hT100000000HjIAI"
                     },
                     {
                        "targetObjectRecordType":null,
                        "targetObject":"CareDiagnosis",
                        "ocrTargetObjectId":"97hT100000000HoIAI"
                     }
                  ],
                  "name":"bb",
                  "documentTypeId":"0deT10000004CCbIAM",
                  "developerName":"bb"
               },
               {
                  "ocrTemplateId":"48tT10000004CF1IAM",
                  "ocrTargetObjects":[
                     {
                        "targetObjectRecordType":null,
                        "targetObject":"Account",
                        "ocrTargetObjectId":"97hT10000004CelIAE"
                     }
                  ],
                  "name":"scrlicense",
                  "documentTypeId":"0deT10000004CCbIAM",
                  "developerName":"scrlicense"
               },
               {
                  "ocrTemplateId":"48tT1000000004NIAQ",
                  "ocrTargetObjects":[
                     {
                        "targetObjectRecordType":null,
                        "targetObject":"Contact",
                        "ocrTargetObjectId":"97hT100000000HtIAI"
                     }
                  ],
                  "name":"bb2",
                  "documentTypeId":"0ghT11000004CCbIF",
                  "developerName":"bb2"
               }
            ]
```

```
            }
        },
        "version":1
    }
]
```

Fetch Extracted Text Action

Fetch the text extracted from an uploaded document.

Special Access Rules

This action is available in API version 58.0 and later for users with the AWSTextract1000LimitAddOn or IntelligentDocumentReaderAddOn license.

Supported REST HTTP Methods

URI

`/services/data/v***XX.X***/actions/standard/fetchExtractedText`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer ***token***`

Inputs

Input	Details
`contentDocumentId`	**Type** string **Description** Required. The unique content document ID of the uploaded document to get the extracted text. Note: You can specify up to 20 content Document IDs.
`endPageIndex`	**Type** Integer **Description** Optional. The page number up to which the extracted text must be retrieved. The default value is the last page number in the specified document.
`startPageIndex`	**Type** Integer

Input	Details
	Description Optional. The page number to start fetching the extracted text. The default value is 1. Note: You can fetch the extracted text from up to 20 pages in a specified document.

Outputs

Output	Details
`ocrDocumentScanResultDetails`	**Type** string **Description** The details of the extracted document including key value pairs of the extracted text, bounding box coordinates, and extraction confidence for the specified documents. This output is an Apex output type that contains nested arrays in JSON format. The `ocrDocumentScanResultDetails` output contains an array of the `OcrDocumentScanResultDetailsList` Apex class. Each element in this array corresponds to an input `contentDocumentId` in the same order as they were provided in the request.

Example

Sample Request

```
{
   "inputs":[
      {
         "contentDocumentId":"069T10000004FnoIAE",
         "startPageIndex":1,
         "endPageIndex":20
      }
   ]
}
```

Sample Response

```
[
   {
      "actionName":"fetchExtractedText",
      "errors":null,
      "isSuccess":true,
      "outputValues":{
         "ocrDocumentScanResultDetails":{
            "ocrDocumentScanResultDetails":[
               {
```

```
"status":"SUCCESS",
"pageNumber":1,
"ocrService":"AMAZON_TEXTRACT",
"ocrDocumentScanResultId":"0ixT100000000bv",
"keyValuePairs":[
   {
      "value":{
         "value":"30 NOV 2009",
         "confidence":51.1217041015625
      },
      "key":{
         "value":"Issued On",
         "confidence":51.1217041015625
      }
   },
   {
      "value":{
         "value":"F",
         "confidence":62.40586471557617
      },
      "key":{
         "value":"Sex",
         "confidence":62.40586471557617
      }
   },
   {
      "value":{
         "value":"C03004786",
         "confidence":29.852550506591797
      },
      "key":{
         "value":"Passport Card no",
         "confidence":29.852550506591797
      }
   },
   {
      "value":{
         "value":"NEW YORK U.S.A.",
         "confidence":44.244361877441406
      },
      "key":{
         "value":"Place of Birth",
         "confidence":44.244361877441406
      }
   },
   {
      "value":{
         "value":"1 JAN 1981",
         "confidence":71.45907592773438
      },
      "key":{
         "value":"Date of Birth",
         "confidence":71.45907592773438
      }
```

```
            },
            {
               "value":{
                  "value":"29 NOV 2019",
                  "confidence":57.35758590698242
               },
               "key":{
                  "value":"Expires On",
                  "confidence":57.35758590698242
               }
            },
            {
               "value":{
                  "value":"HAPPY",
                  "confidence":34.885074615478516
               },
               "key":{
                  "value":"Given Names",
                  "confidence":34.885074615478516
               }
            }
         ]
      },
      {
         "status":"SUCCESS",
         "pageNumber":1,
         "ocrService":"AMAZON_TEXTRACT_ANALYZED_ID",
         "ocrDocumentScanResultId":"0ixT100000000c0",
         "keyValuePairs":[
            {
               "value":{
                  "value":"HAPPY",
                  "confidence":82.33665466308594
               },
               "key":{
                  "value":"FIRST_NAME",
                  "confidence":100.0
               }
            },
            {
               "value":{
                  "value":"TRAVELER",
                  "confidence":80.86970520019531
               },
               "key":{
                  "value":"LAST_NAME",
                  "confidence":100.0
               }
            },
            {
               "value":{
                  "value":"",
                  "confidence":99.19149780273438
               },
```

```
            "key":{
               "value":"MIDDLE_NAME",
               "confidence":0.0
            }
         },
         {
            "value":{
               "value":"",
               "confidence":99.17862701416016
            },
            "key":{
               "value":"SUFFIX",
               "confidence":0.0
            }
         },
         {
            "value":{
               "value":"",
               "confidence":99.21914672851562
            },
            "key":{
               "value":"CITY_IN_ADDRESS",
               "confidence":0.0
            }
         },
         {
            "value":{
               "value":"",
               "confidence":99.13475036621094
            },
            "key":{
               "value":"ZIP_CODE_IN_ADDRESS",
               "confidence":0.0
            }
         },
         {
            "value":{
               "value":"",
               "confidence":99.09383392333984
            },
            "key":{
               "value":"STATE_IN_ADDRESS",
               "confidence":0.0
            }
         },
         {
            "value":{
               "value":"",
               "confidence":99.17210388183594
            },
            "key":{
               "value":"STATE_NAME",
               "confidence":0.0
            }
```

```
},
{
   "value":{
      "value":"C03004786",
      "confidence":94.59364318847656
   },
   "key":{
      "value":"DOCUMENT_NUMBER",
      "confidence":100.0
   }
},
{
   "value":{
      "value":"29 NOV 2019",
      "confidence":95.38605499267578
   },
   "key":{
      "value":"EXPIRATION_DATE",
      "confidence":100.0
   }
},
{
   "value":{
      "value":"1 JAN 1981",
      "confidence":97.8244857788086
   },
   "key":{
      "value":"DATE_OF_BIRTH",
      "confidence":100.0
   }
},
{
   "value":{
      "value":"30 NOV 2009",
      "confidence":86.14622497558594
   },
   "key":{
      "value":"DATE_OF_ISSUE",
      "confidence":100.0
   }
},
{
   "value":{
      "value":"DRIVER LICENSE FRONT",
      "confidence":93.44902038574219
   },
   "key":{
      "value":"ID_TYPE",
      "confidence":100.0
   }
},
{
   "value":{
      "value":"",
```

```
            "confidence":99.12863159179688
         },
         "key":{
            "value":"ENDORSEMENTS",
            "confidence":0.0
         }
      },
      {
         "value":{
            "value":"",
            "confidence":99.17374420166016
         },
         "key":{
            "value":"VETERAN",
            "confidence":0.0
         }
      },
      {
         "value":{
            "value":"",
            "confidence":99.16364288330078
         },
         "key":{
            "value":"RESTRICTIONS",
            "confidence":0.0
         }
      },
      {
         "value":{
            "value":"",
            "confidence":99.1679458618164
         },
         "key":{
            "value":"CLASS",
            "confidence":0.0
         }
      },
      {
         "value":{
            "value":"",
            "confidence":99.17534637451172
         },
         "key":{
            "value":"ADDRESS",
            "confidence":0.0
         }
      },
      {
         "value":{
            "value":"",
            "confidence":99.17364501953125
         },
         "key":{
            "value":"COUNTY",
```

```
                        "confidence":0.0
                     }
                  },
                  {
                     "value":{
                        "value":"NEW YORK U.S.A.",
                        "confidence":94.59681701660156
                     },
                     "key":{
                        "value":"PLACE_OF_BIRTH",
                        "confidence":100.0
                     }
                  },
                  {
                     "value":{
                        "value":"",
                        "confidence":97.52543640136719
                     },
                     "key":{
                        "value":"MRZ_CODE",
                        "confidence":0.0
                     }
                  }
               ]
            }
         ]
      }
   },
   "version":1
}
]
```


Initiate Text Extraction Action

Extract text from an uploaded document by using the Amazon Textract API.

You can automate the Intelligent Document Reader's text detection and extraction steps using this invocable action.

Special Access Rules

This action is available in API version 58.0 and later for users with the AWSTextract1000LimitAddOn or IntelligentDocumentReaderAddOn license.

Supported REST HTTP Methods

URI

`/services/data/v`***`XX.X`***`/actions/standard/initiateTextExtraction`

Formats

JSON, XML

HTTP Methods

POST

Authentication

```
Authorization: Bearer token
```

Inputs

Input	Details
`configurationAPIName`	**Type** string **Description** For internal use only.
`contentDocumentId`	**Type** string **Description** Required. The unique content document ID of the uploaded document to initiate text extraction. You can specify up to 20 content Document IDs.
`documentTypeId`	**Type** string **Description** Optional. The ID of the document type that contains the queries. These queries are used to retrieve the OCR Service. Available in API version 60.0 and later.
`endPageIndex`	**Type** integer **Description** Optional. The page number up to which the text must be extracted. The default value is the last page number in the specified document.
`ocrService`	**Type** picklist **Description** Optional. The name of the OCR service that extracts text from the document. Valid values are: • `AMAZON_TEXTRACT`—Indicates the AWS Document service. • `AMAZON_TEXTRACT_ANALYZE_ID`—Indicates the AWS Analyze ID service. • `AMAZON_TEXTRACT_DETECT_TEXT`—Indicates the AWS Detect service that displays the text detected in a document. • `PDF_DOCX_EXTRACT_TEXT`—Indicates the AWS Extract service that automatically extracts content from PDF files.

Input	Details
	Required if the `documentTypeId` property isn't specified. The `ocrService` is retrieved based on the `documentTypeId` property.
`startPageIndex`	**Type** integer **Description** Optional. The page number to start text extraction. By default, the starting page number is 1. You can extract text from up to 20 pages in a specified document.

Outputs

Output	Details
`ocrDocumentScanResultDetails`	**Type** string **Description** A comma-separated list containing an OcrDocumentScanResult ID and a page number for each extracted page of the specified document.

Example

Sample Request

```
{
  "inputs": [
    {
      "contentDocumentId": "069T10000004FnoIAE",
      "startPageIndex": 1,
      "endPageIndex": 20,
      "ocrService": "AMAZON_TEXTRACT",
      "documentTypeId": "0deT10000004CCbIAM"
    }
  ]
}
```

Sample Response

```
[
   {
      "actionName":"initiateTextExtraction",
      "errors":null,
      "isSuccess":true,
      "outputValues":{
         "ocrDocumentScanResultDetails":{
            "ocrDocumentScanResults":[
```

```
                {
                   "pageNumber":1,
                   "ocrDocumentScanResultId":"0ixT100000000bv"
                }
             ]
          }
       },
       "version":1
    }
]
```

CHAPTER 20 Interest Tagging

In this chapter ...

- Interest Tagging Business APIs

Tags are words or short phrases that users can associate with Salesforce records to capture customer needs, interests, and opportunities.

When your users have their customer's interests in mind, they can develop a deeper relationship with their customers during interactions.

Organize Interest Tags into Tag Categories, which let you group similar Interest Tags together to easily create reports and dashboards to show commonalities and opportunities with clients.

Interest Tagging Business APIs

Use the Interest Tagging Business APIs to give users a seamless API experience for Interest Tags.

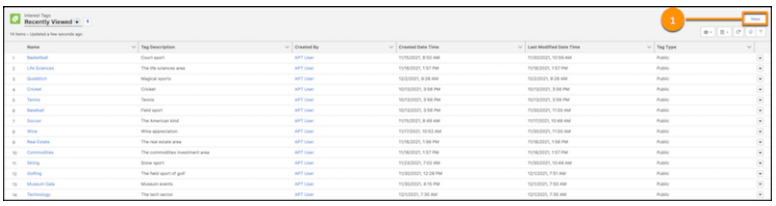
Note: Interest Tag API is only for use with Interest Tags, not with Topics Tags or Communities Tags.

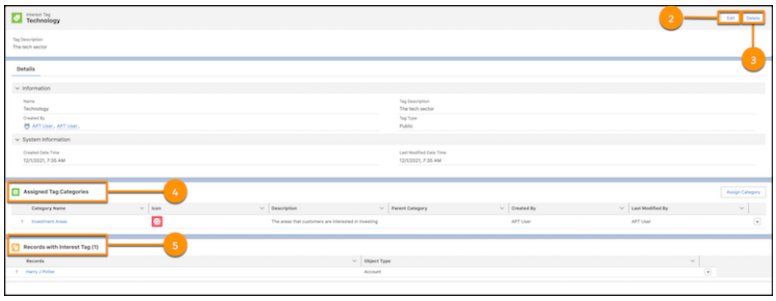
Here are some examples on how the Salesforce UI interacts with the Interest Tags resources:

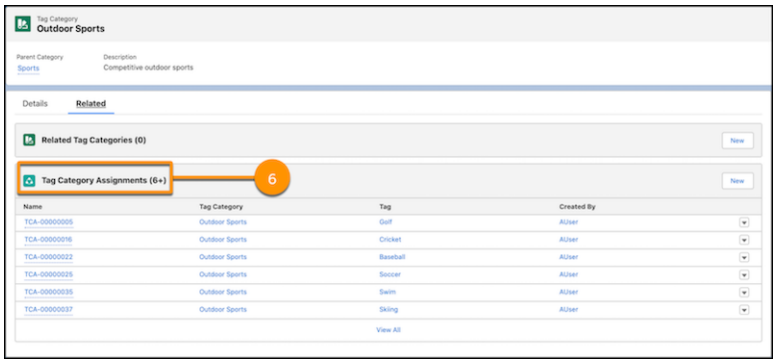
EDITIONS

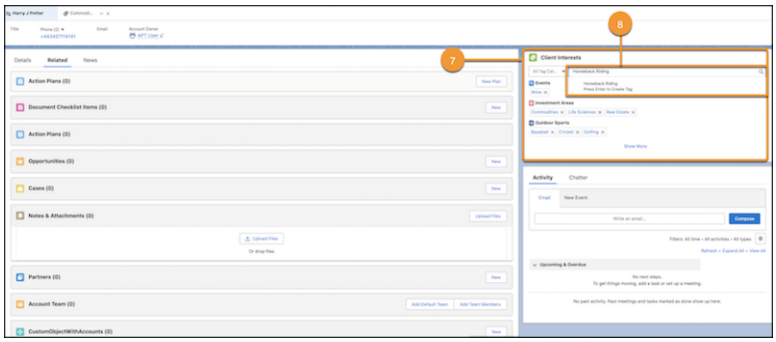
Available in: Lightning Experience

Available in: Interest Tagging is available with Enterprise, Unlimited, and Performance Editions with the Financial Services Cloud.









Following are the available Interest Tags resources as numbered in the Salesforce UI:

Label Number in the UI	Resource	Description
1	`/connect/interest-tags/tags`	Create an Interest Tag.
2	`/connect/interest-tags/tags/${tagId}`	Update an Interest Tag.
3	`/connect/interest-tags/tags?tagId=tagId1`	Delete Interest Tags by tag IDs.
4	`/connect/interest-tags/categories`	Retrieve a list of categories assigned to an Interest Tag.
5	`/connect/interest-tags/assignments/tag/${tagId}`	Retrieve a list of assignments by an Interest Tag ID.
6	`/connect/interest-tags/tags?categoryId={categoryId}`	Retrieve a list of Interest Tags by a tag category ID.
7	`/connect/interest-tags/assignments/entity/${recordId}`	Retrieve a list of interest tags grouped by tag categories that are assigned to a Salesforce object record.
8	`/connect/interest-tags/assignments`	Create assignments for Interest Tags and the Salesforce object record.

REST Reference

You can access Interest Tags APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

REST Reference

You can access Interest Tags 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 Interest Tags API resources.

Request Bodies
Here's a list of Interest Tags API request bodies.

Response Bodies
Here's a list of Interest Tags API response bodies.

Resources

Here's a list of Interest Tags API resources.

Interest Tags (DELETE, GET, POST)
Create an Interest Tag. Delete Interest Tags by the tag IDs. Retrieve a list of Interest Tags by a category ID.

Interest Tags (PATCH)
Update Interest Tags.

Interest Tag Categories (GET)
Retrieve a list of tag categories assigned to an Interest Tag.

Interest Tags for Records (GET)
Retrieve a list of Interest Tags assigned to a Salesforce object record.

Interest Tag Assignments (GET)
Retrieve a list of record assignments by an Interest Tag.

Assignments for Interest Tags and Records (POST)
Create assignments for Interest Tags and Salesforce object records.

Interest Tags (DELETE, GET, POST)

Create an Interest Tag. Delete Interest Tags by the tag IDs. Retrieve a list of Interest Tags by a category ID.

Resource

```
/connect/interest-tags/tags
```

Example for DELETE

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/interest-tags/tags?tagId=0qOxx0000004C94EAE,0qOxx0000004C92EAE
```

Example for GET

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/interest-tags/tags?categoryId=0qRxx0000000001EAA
```

Example for POST

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/interest-tags/tags
```

Available version
54.0

Requires Chatter
No

HTTP methods
DELETE, GET, POST

Query parameters for DELETE

Parameter Name	Type	Description	Required or Optional	Available Version
`tagIds`	String	The list of IDs for the Interest Tags to delete.	Required	54.0

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`categoryId`	String	The category ID assigned to an Interest Tag.	Required	54.0
`limit`	Integer	The maximum number of Interest Tags to return. Maximum is 100.	Optional	54.0
`offset`	Integer	The offset for the next set of results. The offset parameter specifies the end of the last batch retrieved. For example, to retrieve 15 Interest Tags at a time: • Request the first 15 with an offset of 0. • Request the second 15 with an offset of 15.	Optional	54.0
`orderBy`	String	Order the results to display by the category name or Interest Tag ID.	Optional	54.0
`sort`	String	Sort the results in ascending or descending order.	Optional	54.0

Response body for GET
Interest Tag List

Request body for POST

JSON example

```
{
   "interestTagList":[
      {
         "tagDescription":"Golf",
```

```
            "tagName":"Golf",
            "categoryId":"0qRxx0000000001EAA",
            "recordId" : "001xx000003DGQyAAO"
        }
    ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`categoryId`	String	The category ID of an Interest Tag.	Required	54.0
`recordId`	String	ID of the record to assign an Interest Tag.	Optional	54.0
`tagDescription`	String	The description of an Interest Tag.	Optional	54.0
`tagName`	String	The unique name of an Interest Tag.	Required	54.0

Response body for POST

Interest Tag Create Collection Output

Interest Tags (PATCH)

Update Interest Tags.

Resource

```
/connect/interest-tags/tags/${tagId}
```

Example for PATCH

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/interest-tags/tags/0qOxx0000004C94EAE
```

Available version

54.0

Requires Chatter

No

HTTP methods

PATCH

Request body for PATCH

JSON example

```
{
   "tagDescription":"High networth group",
   "tagName":"High networth",
   "addCategoryIds":[
      "0ZOi000001CkbWugnd",
      "0ZOi000001CkbWugne",
      "0ZOi000001CkbWugnf"
   ],
```

```
    "removeCategoryIds":[
       "0ZOi000001CkbWnnnn",
    ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
addCategoryIds	String[]	The categories to assign to an Interest Tag.	Optional	54.0
removeCategoryIds	String[]	The categories to remove from an Interest Tag.	Optional	54.0
tagDescription	String	The description of an Interest Tag.	Optional	54.0
tagName	String	The name of an Interest Tag.	Optional	54.0

Response body for PATCH

Interest Tag Update Output

Interest Tag Categories (GET)

Retrieve a list of tag categories assigned to an Interest Tag.

Resource

```
/connect/interest-tags/categories
```

Example for GET

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/interest-tags/categories?tagId=0qOxx0000004C94EAE
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
limit	Integer	The maximum number of tag categories to return in the response.	Optional	54.0
offset	Integer	The offset for the next set of results. The offset parameter specifies the end of the	Optional	54.0

Parameter Name	Type	Description	Required or Optional	Available Version
		last batch retrieved. For example, to retrieve 15 tag categories at a time: • Request the first 15 with an offset of 0. • Request the second 15 with an offset of 15.		
`orderBy`	String	Order the results to display by the tag category name.	Optional	54.0
`sort`	String	Sort the results in ascending or descending order.	Optional	54.0
`tagId`	String	The ID of an Interest Tag for which you want to get the assigned tag categories.	Required	54.0

Response body for GET

Tag Category List

Interest Tags for Records (GET)

Retrieve a list of Interest Tags assigned to a Salesforce object record.

Resource

```
/connect/interest-tags/assignments/entity/${recordId}
```

Example

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/interest-tags/assignments/entity/0qRxx0000004C9mm
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`limit`	Integer	The maximum number of Interest Tags to return in the response.	Optional	54.0
`offset`	Integer	The offset for the next set of results. The offset parameter specifies the end of the	Optional	54.0

Parameter Name	Type	Description	Required or Optional	Available Version
		last batch retrieved. For example, to retrieve 15 Interest Tags at a time: • Request the first 15 with an offset of 0. • Request the second 15 with an offset of 15.		
`orderBy`	String	Order the results to display by Interest Tags name.	Optional	54.0
`sort`	String	Sort the results in ascending or descending order.	Optional	54.0

Response body for GET

Interest Tag List

Interest Tag Assignments (GET)

Retrieve a list of record assignments by an Interest Tag.

Resource for GET

```
/connect/interest-tags/assignments/tag/${tagId}
```

Example for GET

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect
/interest-tags/assignments/tag/0qOxx0000004C94EAE
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`limit`	Integer	The maximum number of assignments to return in the response.	Optional	54.0
`offset`	Integer	The offset for the next set of results. The offset parameter specifies the end of the last batch retrieved. For example, to retrieve 15 assignments at a time: • Request the first 15 with an offset of 0.	Optional	54.0

Parameter Name	Type	Description	Required or Optional	Available Version
		• Request the second 15 with an offset of 15.		
`orderBy`	String	Order the results to display by the assignment name.	Optional	54.0
`sort`	String	Sort the results in ascending or descending order.	Optional	54.0

Response body for GET

Tag Record Assignment Collection

Assignments for Interest Tags and Records (POST)

Create assignments for Interest Tags and Salesforce object records.

Resource

```
/connect/interest-tags/assignments
```

Example for GET

```
https://yourInstance.salesforce.com/services/data/vXX.X/connect/interest-tags/assignments
```

Available version

54.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "recordsForTag": {
    "tagId": "0TOi000001AWbWugta",
    "recordIds": [
      "001i000001AWbWuabc",
      "001i000001AWbWuabd"
    ]
  },
  "tagsForRecord": {
    "recordId": "001i000001AWbWuabc",
    "tagIds": [
      "0TOi000001AWbWugta",
      "0TOi000001AWbWugtb"
    ]
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`recordsForTag`	Records For Tag Input	List of Salesforce object record IDs to assign to an Interest Tag.	Optional	54.0
`tagsForRecord`	Tags For Record Input	List of Interest Tags to assign to a Salesforce object record.	Optional	54.0

Response body for POST

Interest Tag Assignment Output

Request Bodies

Here's a list of Interest Tags API request bodies.

Interest Tag Assignment Input

Input representation for Interest Tag record assignment.

Interest Tag Create Input

Input representation for creating Interest Tags.

Interest Tag Update Input

Input representation of an Interest Tag update request.

Records for Tag Input

Input representation of records for an Interest Tag.

Tags for Record Input

Input representation of Interest Tags for a record.

Interest Tag Assignment Input

Input representation for Interest Tag record assignment.

JSON example

```
{
  "recordsForTag": {
    "tagId": "0TOi000001AWbWugta",
    "recordIds": [
      "001i000001AWbWuabc",
      "001i000001AWbWuabd"
    ]
  },
  "tagsForRecord": {
    "recordId": "001i000001AWbWuabc",
    "tagIds": [
      "0TOi000001AWbWugta",
      "0TOi000001AWbWugtb"
    ]
```

```
   }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordsForTag	Records For Tag Input	List of Salesforce object record IDs to assign to an Interest Tag.	Optional	54.0
tagsForRecord	Tags For Record Input	List of Interest Tags to assign to a Salesforce object record.	Optional	54.0

Interest Tag Create Input

Input representation for creating Interest Tags.

JSON example

```
{
   "interestTagList":[
      {
         "tagDescription":"Golf",
         "tagName":"Golf",
         "categoryId":"0qRxx0000000001EAA",
         "recordId" : "001xx000003DGQyAAO"
      }
   ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
categoryId	String	The category ID of an Interest Tag.	Required	54.0
recordId	String	ID of the record to assign an Interest Tag.	Optional	54.0
tagDescription	String	The description of an Interest Tag.	Optional	54.0
tagName	String	The unique name of an Interest Tag.	Required	54.0

Interest Tag Update Input

Input representation of an Interest Tag update request.

JSON example

```
{
   "tagDescription":"High networth group",
   "tagName":"High networth",
   "addCategoryIds":[
      "0ZOi000001CkbWugnd",
```

```
      "0ZOi000001CkbWugne",
      "0ZOi000001CkbWugnf"
   ],
   "removeCategoryIds":[
      "0ZOi000001CkbWnnnn",
   ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
addCategoryIds	String[]	The categories to assign to an Interest Tag.	Optional	54.0
removeCategoryIds	String[]	The categories to remove from an Interest Tag.	Optional	54.0
tagDescription	String	The description of an Interest Tag.	Optional	54.0
tagName	String	The name of an Interest Tag.	Optional	54.0

Records for Tag Input

Input representation of records for an Interest Tag.

JSON example

```
{
   "recordsForTag":{
      "tagId":"0TOi000001AWbWugta",
      "recordIds":[
         “001i000001AWbWuabc”,
         001i000001AWbWuabd”
      ]
   }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordIds	String[]	The Salesforce object record IDs.	Required	54.0
tagId	String	The ID of an Interest Tag.	Optional	54.0

Tags for Record Input

Input representation of Interest Tags for a record.

JSON example

```
{
  "tagsForRecord":{
```

```
        "recordId":"001i000001AWbWuabc",
        "tagIds":[
           "0TOi000001AWbWugta",
           "0TOi000001AWbWugtb"
        ]
    }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
recordId	String	The Salesforce object record ID.	Required	54.0
tagIds	String[]	The list of the Interest Tag IDs.	Required	54.0

Response Bodies

Here's a list of Interest Tags API response bodies.

Interest Tag
Output representation of the details of an Interest Tag.

Interest Tag Assignment
Output representation of an Interest Tag record assignment.

Interest Tag Create Collection Output
Output representation of a collection of Interest Tags that are created.

Interest Tag Create Result
Result of the Interest Tags create request.

Interest Tag List
Output representation of the list of Interest Tags.

Interest Tag Update Output
Output representation of Interest Tag update request.

Tag Category
Output representation of the category details of an interest tag.

Tag Category List
Output representation of a list of tag categories assigned to an Interest Tag.

Tag Category with Parent
Output representation of a category with its parent category.

Tag Record Assignment
Output representation of the assignment details.

Tag Record Assignment Collection
Output representation of a collection of record assignments for an Interest Tag.

Interest Tag

Output representation of the details of an Interest Tag.

JSON example

```
{
    "categories" : [ {
      "categoryId" : "0qRxx0000000001EAA",
      "name" : "life",
      "icon" : "custom:custom11",
    } ],
    "name" : "school",
    "tagId" : "0qOxx0000004C92EAE",
    "recordAssignmentId" : "0qRxx0000004C9mm"
  }
```

Property Name	Type	Description	Filter Group and Version	Available Version
categories	Tag Category[]	The categories assigned to an Interest Tag.	Small, 54.0	54.0
name	String	The name of an Interest Tag.	Small, 54.0	54.0
recordAssignmentId	String	The record assignment ID of an Interest Tag and a record.	Small, 54.0	54.0
tagId	String	The ID of an Interest Tag.	Small, 54.0	54.0

Interest Tag Assignment

Output representation of an Interest Tag record assignment.

JSON example

```
{
   "errors":[],
   "success":true,
   "created":true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
errors	String[]	Any error messages that were returned by the API.	Small, 54.0	54.0
isCreated	Boolean	Indicates whether an Interest Tag or a record assignment was successful (true) or not (false).	Small, 54.0	54.0
isSuccess	Boolean	Indicates whether the assignment request was successful (true) or not (false).	Small, 54.0	54.0

Interest Tag Create Collection Output

Output representation of a collection of Interest Tags that are created.

Property Name	Type	Description	Filter Group and Version	Available Version
results	Interest Tag Create Result[]	List of Interest Tag records created.	Small, 54.0	54.0

Interest Tag Create Result

Result of the Interest Tags create request.

JSON example

```
{
  "results" : [
   {
    "isCreated" : true,
    "isSuccess" : true,
    "tagId" : "0qOxx0000004DJcEAM"
  },
 {
    "isCreated" : true,
    "isSuccess" : true,
    "tagId" : "0qOxx0000004DbscEAM"
  }
]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
error	String	The error code and message, if the create request failed.	Small, 54.0	54.0
isCreated	Boolean	Indicates whether Interest Tags were successfully created (true) or not (false).	Small, 54.0	54.0
isSuccess	Boolean	Indicates whether the create request was successful (true) or not (false).	Small, 54.0	54.0
tagId	String	The ID of Interest Tags that were created.	Small, 54.0	54.0

Interest Tag List

Output representation of the list of Interest Tags.

JSON example

```
{
  "tags" : [ {
```

```
    "categories" : [ {
      "categoryId" : "0qRxx0000000001EAA",
      "name" : "life",
      "icon" : "custom:custom11",
    }, {
      "categoryId" : "0qRxx000000001dEAA",
      "name" : "travel",
      "icon" : "custom:custom11",
    } ],
    "name" : "fishing",
    "tagId" : "0qOxx0000004C93EAE",
    "recordAssignmentId" : "0qRxx0000004C9mm",
  }, {
    "categories" : [ {
      "categoryId" : "0qRxx0000000001EAA",
      "name" : "life",
      "icon" : "custom:custom11",
    } ],
    "name" : "flower",
    "tagId" : "0qOxx0000004C94EAE",
    "recordAssignmentId" : "0qRxx0000004C9mm",
  }, {
    "categories" : [ {
      "categoryId" : "0qRxx0000000001EAA",
      "name" : "life",
      "icon" : "custom:custom11",
    } ],
    "name" : "rose",
    "tagId" : "0qOxx0000004C95EAE",
    "recordAssignmentId" : "0qRxx0000004C9mm",
  }, {
    "categories" : [ {
      "categoryId" : "0qRxx0000000001EAA",
      "name" : "life",
      "icon" : "custom:custom11",
    } ],
    "name" : "school",
    "tagId" : "0qOxx0000004C92EAE",
    "recordAssignmentId" : "0qRxx0000004C9mm"
  } ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
tags	Interest Tag[]	The list of Interest Tags.	Small, 54.0	54.0

Interest Tag Update Output

Output representation of Interest Tag update request.

JSON example

```
{
   "success":true,
   "updated":true
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
isSuccess	Boolean	Indicates whether the update request was successful true) or not (false).	Small, 54.0	54.0
isUpdated	Boolean	Indicates whether an Interest Tag was updated (true) or not (false).	Small, 54.0	54.0

Tag Category

Output representation of the category details of an interest tag.

JSON example

```
{
   "categoryId" : "0qRxx0000000001EAA",
   "name" : "life",
   “icon” : “custom:custom11”,
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
categoryId	String	The category ID.	Small, 54.0	54.0
icon	String	The icon of the category.	Small, 54.0	54.0
name	String	The name of the category.	Small, 54.0	54.0

Tag Category List

Output representation of a list of tag categories assigned to an Interest Tag.

JSON example

```
{
  "categories" : [ {
    "categoryId" : "0qRxx00000004TREAY",
    "icon" : "custom:custom45",
    "name" : "LiCate13",
    "parentCategoryId" : "0qRxx00000004GXEAY",
    "tagCategoryAssignmentId" : "0qTxx00000006JxEAI"
  } ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
categories	Tag Category with Parent[]	List of tag categories for an Interest Tag.	Small, 54.0	54.0

Tag Category with Parent

Output representation of a category with its parent category.

JSON example

```
{
   "categoryId" : "0qRxx00000004TREAY",
   "icon" : "custom:custom45",
   "name" : "LiCate13",
   "parentCategoryId" : "0qRxx00000004GXEAY",
   "tagCategoryAssignmentId" : "0qTxx00000006JxEAI"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
categoryId	String	The ID of the tag category.	Small, 54.0	54.0
icon	String	The icon name of the tag category.	Small, 54.0	54.0
name	String	The name of the tag category.	Small, 54.0	54.0
parentCategoryId	String	The parent category ID of the tag category.	Small, 54.0	54.0
tagCategoryAssignmentId	String	The tag category assignment ID of a tag category and an Interest Tag.	Small, 54.0	54.0

Tag Record Assignment

Output representation of the assignment details.

Example

```
{
   "recordId":"001i000001AWbWuabc",
   "objectName":"Account",
   "recordName":"Square Pizza"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
assignmentId	String	The assignment ID of an Interest Tag and the Salesforce object record.	Small, 54.0	54.0
objectName	String	The name of the Salesforce object to which this record belongs.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
recordId	String	The ID of the Salesforce object record.	Small, 54.0	54.0
recordName	String	The name of the Salesforce object record.	Small, 54.0	54.0

Tag Record Assignment Collection

Output representation of a collection of record assignments for an Interest Tag.

JSON example

```
{
   "assignments":
   [
       {
           "recordId":"001i000001AWbWuabc",
           "objectName":"Account",
           "recordName":"Square Pizza"
       },
       {
           "recordId":"003i000001AWbWugpu",
           "objectName":"Contact",
           "recordName":"Steven Crowder"
       }
   ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
assignments	Tag Record Assignment[]	List of record assignments for an Interest Tag.	Small, 54.0	54.0

CHAPTER 21 Omnistudio Business APIs

In this chapter ...

- REST Reference

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

Note: These APIs have been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

OmniStudio provides a suite of services, components, and data model objects that combine to create Industry Cloud applications. Create guided interactions using data from your Salesforce org and external sources.

SEE ALSO:

Omnistudio Foundation Guide

REST Reference

You can access Omnistudio 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.

Expression Set

An expression set allow complex math to be configured within OmniStudio. Expression set is also known as calculation Procedure or evaluation service.

Decision Matrix

A decision matrix is a table that looks up information using multiple input dimensions and returns the corresponding output value. Decision matrix is also known as calculation matrix.

Expression Set

An expression set allow complex math to be configured within OmniStudio. Expression set is also known as calculation Procedure or evaluation service.

Note: These APIs have been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Sometimes you need more than a simple mathematical equation, and configuring expression set enables you to run just this kind of comprehensive and detailed set of mathematical processing steps.

To handle many factors, values, and calculations, a expression set can call up one or more decision matrices. These are simply lookup tables that take a unique input or set of inputs and return an output or set of outputs. Use a decision matrix whenever you need to look up data.

Resources

Here's a list of Expression Set API (also known as Calculation Procedure) resources.

Request Bodies

Here's a list of Expression Set API (also known as Calculation Procedure) request bodies.

Response Bodies

Here's a list of Expression Set API (also known as Calculation Procedure) response bodies.

Resources

Here's a list of Expression Set API (also known as Calculation Procedure) resources.

Calculation Procedure

Retrieve the details for a given expression set (also known as calculation procedure) record.

Calculation Procedures

Get a list of expression sets (also known as calculation procedure) based on a search text. The API returns a maximum of ten expression set records that contain the specified keyword.

Calculation Procedure Version Definition (Activate, Get)

Retrieve the definition of an expression set (also known as calculation procedure) version record. Activate an expression set version record.

Calculation Procedure Version Definition (Save As, Update)

Update the details of an expression set (also known as calculation procedure) version record. Save an expression set version record as a new expression set version record.

Simulations

Retrieve the input variables of an expression set that are required to run a simulation. Run a simulation. An expression set, also known as calculation procedure, is a group of steps that perform mathematical operations and transformations.

Calculation Procedure

Retrieve the details for a given expression set (also known as calculation procedure) record.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Resource

```
/connect/omnistudio/evaluation-services/${id}
```

Example

```
/services/data/v53.0/connect/omnistudio/evaluation-services/0k0x000000000BQAAY
```

Available version

53.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Calculation Procedure Detail Output

Calculation Procedures

Get a list of expression sets (also known as calculation procedure) based on a search text. The API returns a maximum of ten expression set records that contain the specified keyword.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Resource

```
/connect/omnistudio/evaluation-services
```

Example URI

```
/services/data/v53.0/connect/omnistudio/evaluation-services?searchKey=Expression
```

Available version

53.0

Requires Chatter
No

HTTP methods
GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`searchKey`	String	The user-entered search text to retrieve a list of expression sets.	Required	53.0

Response body for GET
Calculation Procedure List Output

Calculation Procedure Version Definition (Activate, Get)

Retrieve the definition of an expression set (also known as calculation procedure) version record. Activate an expression set version record.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Resource

```
/connect/omnistudio/evaluation-services/version-definitions/${id}
```

Example

```
/services/data/v53.0/connect/omnistudio/evaluation-services/
version-definitions/0lIxx000000001dEAA
```

Available version
53.0

Requires Chatter
No

HTTP methods
GET, PATCH

Response body for GET
Calculation Procedure Version Definition Output

Response body for PATCH
Calculation Procedure Activation Output

Calculation Procedure Version Definition (Save As, Update)

Update the details of an expression set (also known as calculation procedure) version record. Save an expression set version record as a new expression set version record.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Resource

```
/connect/omnistudio/evaluation-services/version-definitions
```

Available version

53.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

Specify the version record ID or `CLONE` in the `versionId` field to either update an existing expression set version record or save the expression set version record as a new expression set version record.


```
{
   "calculationProcedureId":"0k0xx00000000HlAAI",
   "code":"200",
   "constants":{
      "details":[ {
         "apiName":"SENIOR_CITIZEN_AGE",
         "dataType":"Number",
         "defaultValue":"60",
         "isEditable":true,
         "isUserDefined":true,
         "name":"SENIOR_CITIZEN_AGE",
         "precision":2
      }.]
   },
   "enabled":false,
   "isSuccess":true,
   "message":"",
   "name":"rule3 V1",
   "rank":1,
   "root":{
      "steps":[
         "0mqxx00000000UfAAI"
      ]
   },
   "startDate":"2021-08-04T08:57:23.000Z",
   "step":{
      "details":{
         "0mqxx00000000UfAAI":{
            "childStepIds":[],
            "conditionsExpressionText":"age == SENIOR_CITIZEN_AGE",
            "conditionsUiFormattedText":"{\"bypass\":[]}",
            "id":"0mqxx00000000UfAAI",

"inputVariablesFormatText":"[{\"name\":\"age\",\"dataType\":\"Number\",\"alias\":\"age\"}]",

            "isResultIncluded":false,
            "name":"Condition",
```

```
"outputVariablesFormatText":"{\"name\":\"condition_output__1\",\"dataType\":\"Boolean\",\"alias\":\"condition_output__1\"}",


"outputVariablesMappingText":"{\"condition_output__1\":\"condition_output__1\"}",
            "returnMessageValueSet":"{\"true\":\"\",\"false\":\"\"}",
            "stage":"Calculation",
            "stepType":"Condition"
         }
      }
   },
   "variables":{
      "details":[ {
         "apiName":"condition_output__1",
         "dataType":"Boolean",
         "defaultValue":"False",
         "id":"0kJxx00000000KzEAI",
         "isEditable":false,
         "isUserDefined":false,
         "name":"condition_output__1"
      }, {
         "apiName":"age",
         "dataType":"Number",
         "defaultValue":"60",
         "id":"0kJxx00000000L0EAI",
         "isEditable":true,
         "isUserDefined":true,
         "name":"age",
         "precision":2
      } ]
   },
   "versionId":"0k1xx00000000KzAAI",
   "versionNumber":1
}
```


Properties

Name	Type	Description	Required or Optional	Available Version
calculationProcedureId	String	The ID of the expression-set record that you want to update the definition details for or save as a new version definition record.	Optional	53.0
constants	Calculation Procedure Resource[]	The constant values passed in the expression set version record.	Optional	53.0
description	String	The description of the expression set version record.	Optional	53.0
enabled	Boolean	Indicates whether the expression set version record is active (true) for	Optional	53.0

Name	Type	Description	Required or Optional	Available Version
		execution or not (`false`). The default is `false`. Note: This field must be false with the update or save as request.		
`endDate`	String	The date and time until when an active expression set version record is in effect.	Optional	53.0
`name`	String	The name of the expression set version record.	Optional	53.0
`rank`	Integer	The rank of the expression set version record. When multiple records are in effect, the record that's ranked higher takes precedence.	Optional	53.0
`root`	String[]	The first steps defined in the expression set version record.	Optional	53.0
`startDate`	String	The start date and time from when an active expression set version record is in effect.	Optional	53.0
`step`	Map<String, Calculation Procedure Step Input>	The list of steps defined in the expression set version record.	Optional	53.0
`variables`	Calculation Procedure Resource[]	The variable values passed in the expression set version record.	Optional	53.0
`versionId`	String	The ID of the expression set version record.	Required	53.0
`versionNumber`	Integer	The version number of the expression set record.	Optional	53.0

Response body for POST

Calculation Procedure Version Definition Output

Simulations

Retrieve the input variables of an expression set that are required to run a simulation. Run a simulation. An expression set, also known as calculation procedure, is a group of steps that perform mathematical operations and transformations.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Resource

```
/connect/omnistudio/evaluation-services/version-definitions/${id}/simulation
```

Example URI for GET

```
/services/data/v53.0/connect/omnistudio/evaluation-services/version-definitions/a1o5w000002EJPPAA4/simulation
```

Example URI for PATCH

```
/services/data/v53.0/connect/omnistudio/evaluation-services/version-definitions/a1o5w000002EJPPAA4/simulation
```

Available version

53.0

Requires Chatter

No

HTTP methods

GET, PATCH

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`inputVariables`	Boolean	Reserved for future use.	Optional	53.0

Response body for GET

Simulation Input Variables Result List

Request body for PATCH

Root XML tag

`SimulationEvalServiceInput`

JSON example

```
{
   "input":{
      "variables":[
         {
            "name":"artEstimatedValue",
            "value":"301",
            "datatype":"number"
         },
         {
            "name":"quantity",
            "value":"301",
            "datatype":"number"
         }
      ]
   },
   "contextInput":{
      "name":"PensionFunds",
      "value":{
         "PolicyDetails":[
```

```
            {
               "PolicyName":"Policy1",
               "TotalMember":"100",
               "PrincipalAmout":"500",
               "Status":"Active",
               "TotalPremium":"0"
            },
            {
               "PolicyName":"Policy2",
               "TotalMember":"200",
               "PrincipalAmout":"100",
               "Status":"Inactive",
               "TotalPremium":"0"
            },
            {
               "PolicyName":"Policy3",
               "TotalMember":"300",
               "PrincipalAmout":"400",
               "Status":"Active",
               "TotalPremium":"0"
            }
         ]
      }
   },
   "config":{
      "versionInfo":{
         "configurationVersionId":"a1o5w000002EJPPAA4",
         "effectiveDate":"2019-02-13 00:00:00"
      }
   }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`config`	Simulation Config Input	Configuration details for the simulation.	Required	53.0
`contextInput`	Simulation Context Input	Context details for the simulation.	Required	58.0
`input`	Simulation Variable Input[]	List of input variables to run the simulation.	Required	53.0

Response body for PATCH

Simulation Eval Service Output

Request Bodies

Here's a list of Expression Set API (also known as Calculation Procedure) request bodies.

Note: These APIs have been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Calculation Procedure Version Definition Input
Input representation of the expression set version definition.

Calculation Procedure Step Input
Input representation for the expression set version steps.

Resource Input
Input representation of the expression set resource (variable or constant).

Simulation Config Input
Input information of the configuration version to run a simulation.

Simulation Evaluation Service Input
Input representation to run simulation on an expression set.

Simulation Context Input
Input representation of context details for simulation.

Simulation Variable Input
Input information of the input variable and its value.

Simulation Version Info Input
Input information of the version details to run simulation.

Calculation Procedure Version Definition Input

Input representation of the expression set version definition.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

JSON example

Specify the version record ID or `CLONE` in the `versionId` field to either update an existing expression set version record or save the expression set version record as a new expression set version record.

```
{
   "calculationProcedureId":"0k0xx00000000HlAAI",
   "code":"200",
   "constants":{
      "details":[ {
         "apiName":"SENIOR_CITIZEN_AGE",
         "dataType":"Number",
         "defaultValue":"60",
         "isEditable":true,
         "isUserDefined":true,
         "name":"SENIOR_CITIZEN_AGE",
         "precision":2
      }.]
   },
   "enabled":false,
   "isSuccess":true,
   "message":"",
```

```
   "name":"rule3 V1",
   "rank":1,
   "root":{
      "steps":[
         "0mqxx00000000UfAAI"
      ]
   },
   "startDate":"2021-08-04T08:57:23.000Z",
   "step":{
      "details":{
         "0mqxx00000000UfAAI":{
            "childStepIds":[],
            "conditionsExpressionText":"age == SENIOR_CITIZEN_AGE",
            "conditionsUiFormattedText":"{\"bypass\":[]}",
            "id":"0mqxx00000000UfAAI",

"inputVariablesFormatText":"[{\"name\":\"age\",\"dataType\":\"Number\",\"alias\":\"age\"}]",

            "isResultIncluded":false,
            "name":"Condition",

"outputVariablesFormatText":"{\"name\":\"condition_output__1\",\"dataType\":\"Boolean\",\"alias\":\"condition_output__1\"}",


"outputVariablesMappingText":"{\"condition_output__1\":\"condition_output__1\"}",
            "returnMessageValueSet":"{\"true\":\"\",\"false\":\"\"}",
            "stage":"Calculation",
            "stepType":"Condition"
         }
      }
   },
   "variables":{
      "details":[ {
         "apiName":"condition_output__1",
         "dataType":"Boolean",
         "defaultValue":"False",
         "id":"0kJxx00000000KzEAI",
         "isEditable":false,
         "isUserDefined":false,
         "name":"condition_output__1"
      }, {
         "apiName":"age",
         "dataType":"Number",
         "defaultValue":"60",
         "id":"0kJxx00000000L0EAI",
         "isEditable":true,
         "isUserDefined":true,
         "name":"age",
         "precision":2
      } ]
   },
   "versionId":"0k1xx00000000KzAAI",
   "versionNumber":1
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
calculationProcedureId	String	The ID of the expression-set record that you want to update the definition details for or save as a new version definition record.	Optional	53.0
constants	Calculation Procedure Resource[]	The constant values passed in the expression set version record.	Optional	53.0
description	String	The description of the expression set version record.	Optional	53.0
enabled	Boolean	Indicates whether the expression set version record is active (`true`) for execution or not (`false`). The default is `false`. Note: This field must be false with the update or save as request.	Optional	53.0
endDate	String	The date and time until when an active expression set version record is in effect.	Optional	53.0
name	String	The name of the expression set version record.	Optional	53.0
rank	Integer	The rank of the expression set version record. When multiple records are in effect, the record that's ranked higher takes precedence.	Optional	53.0
root	String[]	The first steps defined in the expression set version record.	Optional	53.0
startDate	String	The start date and time from when an active expression set version record is in effect.	Optional	53.0
step	Map<String, Calculation Procedure Step Input>	The list of steps defined in the expression set version record.	Optional	53.0
variables	Calculation Procedure Resource[]	The variable values passed in the expression set version record.	Optional	53.0
versionId	String	The ID of the expression set version record.	Required	53.0

Name	Type	Description	Required or Optional	Available Version
`versionNumber`	Integer	The version number of the expression set record.	Optional	53.0

Calculation Procedure Step Input

Input representation for the expression set version steps.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Properties

Name	Type	Description	Required or Optional	Available Version
`calculationMatrixId`	String	The ID of the decision matrix record.	Optional Note: This field is required when the step type is `MatrixLookup`	53.0
`childStepId`	String[]	The IDs of the child steps in the parent expression set version record step.	Optional	53.0
`conditionExpressionText`	String	The user-defined expression text used in a condition step.	Optional	53.0
`conditionUiFormattedText`	String	Additional information required to render the condition expression text. For example, when the current step has a subset of `childStepIds` that is marked to bypass. Specify `"conditionUiFormattedText":"{\"bypass\":[\"0xq000000000ZAA\"]}"` in the field to enable navigation outside the branch.	Optional	53.0
`description`	String	The description of the expression set version record step.	Optional	53.0
`formulaExpressionText`	String	The formula used in a calculation step.	Optional	53.0
`formulaUiFormattedText`	String	Reserved for future use.	Optional	53.0
`id`	String	The ID of the expression set version record step.	Required Note: This field is required for	53.0

Name	Type	Description	Required or Optional	Available Version
			the update request.	
inputVariablesFormatText	String	The input variables in JSON format required to execute an expression set version record step.	Required	53.0
isResultIncluded	Boolean	Indicates whether the result of a step execution is returned to the user. The default is `false`.	Optional	53.0
name	String	The name of the expression set version record step.	Optional	53.0
outputVariablesFormatText	String	The output variables in JSON format returned by an expression set version record step.	Required	53.0
outputVariableMappingText	String	The mapping between the output variable of a step and the input variable for a sub-calculation procedure version record or a sub-decision matrix record.	Optional Note: This field is required when the step type is MatrixLookup or ReferenceProcedure	53.0
referenceCalculationProcedureId	String	The ID of the sub-calculation procedure version record.	Optional Note: This field is required when the step type is ReferenceProcedure	53.0
returnMessageValueSet	String	User-configured messages for the result of the current step.	Optional	53.0
stage	String	Specify whether the expression set version step is a calculation or an aggregation. Note: In version 53.0 and later, only calculation is supported.	Required	53.0

Name	Type	Description	Required or Optional	Available Version
`stepType`	String	Specify the step type in the expression set version. Possible values are: • `Condition` • `Calculation` • `MatrixLookup` • `ReferenceProcedure` • `Branch` • `ConditionalGroup`	Required	53.0

Resource Input

Input representation of the expression set resource (variable or constant).

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

JSON example

```
{
   "variables":{
      "details":[ {
         "apiName":"condition_output__1",
         "dataType":"Boolean",
         "defaultValue":"False",
         "id":"0kJxx00000000KzEAI",
         "isEditable":false,
         "isUserDefined":false,
         "name":"condition_output__1"
      } ]
   }
}
"constants":{
   "details":[ {
      "apiName":"SENIOR_CITIZEN_AGE",
      "dataType":"Number",
      "defaultValue":"60",
      "isEditable":true,
      "isUserDefined":true,
      "name":"SENIOR_CITIZEN_AGE",
      "precision":2
   }.]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`apiName`	String	The API name of the variable or constant.	Required	53.0

Name	Type	Description	Required or Optional	Available Version
calculationMatrixName	String	The name of the decision matrix used in the variable or constant.	Optional	53.0
dataType	String	The date type of the variable or constant. Possible values are: • Boolean • Currency • Date • Number • Percent • Text	Required	53.0
defaultValue	String	The default value of the variable or constant.	Optional	53.0
displayName	String	The display name of the variable or constant that appears in the user interface.	Optional	53.0
id	String	The ID of the variable or constant.	Required Note: This field is required for the update request.	53.0
isEditable	Boolean	Indicates whether the variable or constant is editable. Note: This field is for user-interface use only.	Optional	53.0
isUserDefined	Boolean	Indicates whether the variable or constant is user-defined.	Optional	53.0
name	String	The name of the variable or constant.	Required	53.0
precision	Integer	The floating-point precision of the variable or constant.	Required Note: This field is required when the data type is number, currency, or percentage.	53.0

Name	Type	Description	Required or Optional	Available Version
`uiDisplayOrder`	Integer	The display order of the variable or constant in the UI. Note: Reserved for future use.	Optional	53.0

Simulation Config Input

Input information of the configuration version to run a simulation.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Properties

Name	Type	Description	Required or Optional	Available Version
`versionInfo`	Simulation Version Info Input	The version information of the expression set.	Required	53.0

Simulation Evaluation Service Input

Input representation to run simulation on an expression set.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Root XML tag

`SimulationEvalServiceInput`

JSON example

```
{
   "input":{
      "variables":[
         {
            "name":"artEstimatedValue",
            "value":"301",
            "datatype":"number"
         },
         {
            "name":"quantity",
            "value":"301",
            "datatype":"number"
         }
      ]
   },
   "contextInput":{
      "name":"PensionFunds",
      "value":{
```

```
        "PolicyDetails":[
           {
              "PolicyName":"Policy1",
              "TotalMember":"100",
              "PrincipalAmout":"500",
              "Status":"Active",
              "TotalPremium":"0"
           },
           {
              "PolicyName":"Policy2",
              "TotalMember":"200",
              "PrincipalAmout":"100",
              "Status":"Inactive",
              "TotalPremium":"0"
           },
           {
              "PolicyName":"Policy3",
              "TotalMember":"300",
              "PrincipalAmout":"400",
              "Status":"Active",
              "TotalPremium":"0"
           }
        ]
     }
  },
  "config":{
     "versionInfo":{
        "configurationVersionId":"a1o5w000002EJPPAA4",
        "effectiveDate":"2019-02-13 00:00:00"
     }
  }
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`config`	Simulation Config Input	Configuration details for the simulation.	Required	53.0
`contextInput`	Simulation Context Input	Context details for the simulation.	Required	58.0
`input`	Simulation Variable Input[]	List of input variables to run the simulation.	Required	53.0

Simulation Context Input

Input representation of context details for simulation.

Properties

Name	Type	Description	Required or Optional	Available Version
`contextMappingId`	String	ID of the context mapping.	Optional	62.0
`name`	String	Name of the input context.	Required	58.0
`value`	Object	Value of the input context.	Required	58.0

Simulation Variable Input

Input information of the input variable and its value.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Properties

Name	Type	Description	Required or Optional	Available Version
`datatype`	String	The data type of the variable. Possible values are: • `Boolean` • `Currency` • `Date` • `Number` • `Percent` • `Text`	Required	53.0
`name`	String	The name of the variable.	Required	53.0
`value`	String	The value of the variable.	Required	53.0

Simulation Version Info Input

Input information of the version details to run simulation.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Properties

Name	Type	Description	Required or Optional	Available Version
`configurationVersionId`	String	The ID of the expression set version record.	Required	53.0

Name	Type	Description	Required or Optional	Available Version
`effectiveDate`	String	The expression set version that's active on this date is simulated. When multiple versions are active on the effective date, the version with higher priority is executed.	Optional	53.0

Response Bodies

Here's a list of Expression Set API (also known as Calculation Procedure) response bodies.

Note: These APIs have been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Calculation Procedure Detail Output
Output representation of the expression set details.

Calculation Procedure List Output
Output representation of the expression set result list.

Calculation Procedure Output
Output representation of the expression sets details.

Calculation Procedure Variable Output
Details of the variables of an expression set.

Calculation Procedure Activation Output
Output representation of the calculation procedure version record activation.

Calculation Procedure Version Definition Output
Output representation of the expression set version definition.

Resource List Output
Output representation of the expression set version record resource list.

Resource Output
Output representation of variables or constants used in the calculation procedure version definition.

Root Step List Output
Output representation of the first step of the expression set version record.

Calculation Procedure Step Map Output
Output representation of the step details of the expression set version record.

Calculation Procedure Step Output
Output representation of the steps of the expression set version record.

Simulation Error Output
Error code and details.

Simulation Eval Service Output
Output representation of the simulation run on an expression set.

Simulation Runtime Output
Output representation of the results of an expression set from the simulation.

Simulation Step Explainability Message Output
Output representation of a decision explanation message for a step from the simulation.

Simulation Input Variable Basic
Output representation of the details of an input variable of a simulation.

Simulation Input Variables Result List
Output representation of the list of input variables of a simulation.

Simulation Step Additional Info Output
Information about the decision matrix or sub expression used in a step.

Simulation Step Result Output
Output representation of the simulation results of a step.

Simulation Variable Output
Output representation of a simulation variable and its value.

Calculation Procedure Detail Output

Output representation of the expression set details.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Sample Response

```
{
   "code" : "200",
   "id" : "0k0x000000000BQAAY",
   "inputVariables" : [ {
      "dataType" : "Number",
      "name" : "var1"
   } ],
   "isSuccess" : true,
   "message" : "",
   "name" : "RuleWith100Conditions42",
   "outputVariables" : [ {
      "dataType" : "Number",
      "name" : "var2"
   } ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The request response code.	Small, 53.0	53.0
description	String	The description of the expression set.	Small, 53.0	53.0
id	String	The ID of the expression set record.	Small, 53.0	53.0
inputVariables	Calculation Procedure Variable Output[]	The list of input variables of the expression set.	Small, 53.0	53.0
isSuccess	Boolean	Indicates whether the request is successful.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The request response message.	Small, 53.0	53.0
name	String	The name of the expression set.	Small, 53.0	53.0
outputVariables	Calculation Procedure Variable Output[]	The list of output variables of the expression set.	Small, 53.0	53.0

Calculation Procedure List Output

Output representation of the expression set result list.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Sample Response

```
{
   "calculationProcedures" : [ {
      "id" : "0k0x0000000008ZAAQ",
      "description" : "Test calculation set",
      "name" : "Expression_Set_1"
   },{
      "id" : "0k0x000000000BQAAY",
      "description" : "Test procedure set",
      "name" : "Expression_Set_2"
   } ],
   "code" : "200",
   "isSuccess" : true,
   "message" : ""
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
calculationProcedures	Calculation Procedure Output[]	The list of the expression sets.	Small, 53.0	53.0
code	String	The request response code.	Small, 53.0	53.0
message	String	The request response message.	Small, 53.0	53.0
success	Boolean	Indicates whether the request was successful.	Small, 53.0	53.0

Calculation Procedure Output

Output representation of the expression sets details.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Sample Response

```
{
   "calculationProcedures" : [ {
      "id" : "0k0x0000000008ZAAQ",
      "description" : "Test calculation set",
      "name" : "Expression_Set_1"
   }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
description	String	The description of the expression set.	Small, 53.0	53.0
id	String	The ID of the expression set record.	Small, 53.0	53.0
name	String	The name of the expression set.	Small, 53.0	53.0

Calculation Procedure Variable Output

Details of the variables of an expression set.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Sample Response

```
{
      "dataType" : "Number",
      "name" : "var2"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
dataType	String	The data type of the variable.	Small, 53.0	53.0
name	String	The name of the variable.	Small, 53.0	53.0

Calculation Procedure Activation Output

Output representation of the calculation procedure version record activation.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

JSON Response

```
{
   "code":"200",
   "isSuccess":true,
   "message":"Expression Set Version Activated",
```

```
   "versionId":"0k1xx00000000KzAAI"
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The request response code.	Small, 53.0	53.0
isSuccess	Boolean	Indicates whether the request is successful.	Small, 53.0	53.0
message	String	The request response message.	Small, 53.0	53.0
versionId	String	The ID of the activated calculation procedure version record.	Small, 53.0	53.0

Calculation Procedure Version Definition Output

Output representation of the expression set version definition.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

JSON Response

```
{
   "calculationProcedureId":"0k0xx00000000HlAAI",
   "code":"200",
   "constants":{
      "details":[
         {
            "apiName":"SENIOR_CITIZEN_AGE",
            "dataType":"Number",
            "defaultValue":"60",
            "isEditable":true,
            "isUserDefined":true,
            "name":"SENIOR_CITIZEN_AGE",
            "precision":2
         }
      ]
   },
   "enabled":false,
   "isSuccess":true,
   "message":"",
   "name":"rule3 V1",
   "rank":1,
   "root":{
      "steps":[
         "0mqxx00000000UfAAI"
      ]
   },
   "startDate":"2021-08-04T08:57:23.000Z",
   "step":{
      "details":{
         "0mqxx00000000UfAAI":{
            "childStepIds":[
```

```
            ],
            "conditionsExpressionText":"age == SENIOR_CITIZEN_AGE",
            "conditionsUiFormattedText":"{\"bypass\":[]}",
            "id":"0mqxx00000000UfAAI",

"inputVariablesFormatText":"[{\"name\":\"age\",\"dataType\":\"Number\",\"alias\":\"age\"}]",

            "isResultIncluded":false,
            "name":"Condition",

"outputVariablesFormatText":"{\"name\":\"condition_output__1\",\"dataType\":\"Boolean\",\"alias\":\"condition_output__1\"}",


"outputVariablesMappingText":"{\"condition_output__1\":\"condition_output__1\"}",
            "returnMessageValueSet":"{\"true\":\"\",\"false\":\"\"}",
            "stage":"Calculation",
            "stepType":"Condition"
         }
      }
   },
   "variables":{
      "details":[
         {
            "apiName":"condition_output__1",
            "dataType":"Boolean",
            "defaultValue":"False",
            "id":"0kJxx00000000KzEAI",
            "isEditable":false,
            "isUserDefined":false,
            "name":"condition_output__1"
         },
         {
            "apiName":"age",
            "dataType":"Number",
            "defaultValue":"60",
            "id":"0kJxx00000000L0EAI",
            "isEditable":true,
            "isUserDefined":true,
            "name":"age",
            "precision":2
         }
      ]
   },
   "versionId":"0k1xx00000000KzAAI",
   "versionNumber":1
}
```


Property Name	Type	Description	Filter Group and Version	Available Version
calculationProcedureId	String	The ID of the expression set record.	Small, 53.0	53.0
code	String	The request response code.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
`constants`	Resource List Output	The constant definition of the expression set version record.	Small, 53.0	53.0
`description`	String	The description of the expression set version record.	Small, 53.0	53.0
`enabled`	Boolean	Indicates whether the expression set version record is active for execution. The default is `false`.	Small, 53.0	53.0
`endDate`	String	The date and time until when an active expression set version record is in effect.	Small, 53.0	53.0
`isSuccess`	Boolean	Indicates whether the request is successful.	Small, 53.0	53.0
`message`	String	The request response message.	Small, 53.0	53.0
`name`	String	The name of the expression set version record.	Small, 53.0	53.0
`rank`	Integer	The rank of the expression set version record. When multiple records are in effect, the record that's ranked higher takes precedence. 1 denotes the highest rank.	Small, 53.0	53.0
`root`	Root Step List Output	The first step defined in the expression set version record. If the first step is a branch, then the first steps in the record.	Small, 53.0	53.0
`startDate`	String	The start date and time from when an active expression set version record is in effect.	Small, 53.0	53.0
`step`	Calculation Procedure Step Map Output	The list of steps defined in the expression set version record.	Small, 53.0	53.0
`variables`	Resource List Output	The variable definition of the expression set version record.	Small, 53.0	53.0
`versionId`	String	The ID of the expression set version record.	Small, 53.0	53.0
`versionNumber`	Integer	The number of the expression set version record.	Small, 53.0	53.0

Resource List Output

Output representation of the expression set version record resource list.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
details	Resource Output []	The constant or variable values passed to the expression set version record.	Small, 53.0	53.0

Resource Output

Output representation of variables or constants used in the calculation procedure version definition.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
apiName	String	The API name of the variable or constant.	Small, 53.0	53.0
calculationMatrixName	String	The name of the decision matrix record used in the variable or constant.	Small, 53.0	53.0
dataType	String	The data type of the variable or constant.	Small, 53.0	53.0
defaultValue	String	The default value of the variable or constant.	Small, 53.0	53.0
displayName	String	The display name of the variable or constant.	Small, 53.0	53.0
id	String	The ID of the variable or constant.	Small, 53.0	53.0
isEditable	Boolean	Indicates whether the variable or constant is editable.	Small, 53.0	53.0
isUserDefined	Boolean	Indicates whether the variable or constant is user-defined.	Small, 53.0	53.0
name	String	The name of the variable or constant.	Small, 53.0	53.0
precision	Integer	The floating-point precision of the variable or constant. The value ranges from 0 to 16.	Small, 53.0	53.0
uiDisplayOrder	Integer	Reserved for future use.	Small, 53.0	53.0

Root Step List Output

Output representation of the first step of the expression set version record.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
`steps`	String[]	The first step defined in the calculation procedure version record. If the first step is a branch, then the first steps in the record.	Small, 53.0	53.0

Calculation Procedure Step Map Output

Output representation of the step details of the expression set version record.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
`details`	Map<String, Calculation Procedure Step Output>	The list that contains the step details of the expression set version record.	Small, 53.0	53.0

Calculation Procedure Step Output

Output representation of the steps of the expression set version record.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
`calculationMatrixId`	String	The ID of the decision matrix record.	Small, 53.0	53.0
`childStepIds`	String[]	The IDs of the child steps in the parent expression set version record step.	Small, 53.0	53.0
`conditionsExpressionText`	String	User-defined expression text used in a condition step.	Small, 53.0	53.0
`conditionsUiFormattedText`	String	Additional information required to render the condition expression text. For example, when the current step has a subset of `childStepIds` that is marked to bypass. The code `"conditionsUiFormattedText":"{\"bypass\":[\"0qc000000000000AAA\"]}"` specified in this field enables navigation outside the branch.	Small, 53.0	53.0
`description`	String	The description of the expression set version record step.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
`failedExplainerTemplateId`	String	ID of the failed explainability message template in the Decision Table lookup procedure step.	Small, 56.0	56.0
`failedMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the failed explainability message template.	Small, 59.0	59.0
`formulaExpressionText`	String	The formula used in a calculation step.	Small, 53.0	53.0
`formulaUiFormattedText`	String	Reserved for future use.	Small, 53.0	53.0
`id`	String	The ID of the expression set version record step.	Small, 53.0	53.0
`inputVariablesFormatText`	String	The input variables in JSON format required to execute an expression set version record step.	Small, 53.0	53.0
`isResultIncluded`	Boolean	Indicates whether the result of a step execution is returned to the user. The default is `false`.	Small, 53.0	53.0
`name`	String	The name of the expression set version record step.	Small, 53.0	53.0
`noResultExplainerTemplateId`	String	ID of the no result explainability message template in the Decision Table lookup procedure step.	Small, 59.0	59.0
`noResultMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the no result explainability message template.	Small, 59.0	59.0
`outputVariablesFormatText`	String	The output variables in JSON format returned by an expression set version record step.	Small, 53.0	53.0
`outputVariablesMappingText`	String	The mapping between the output variable of a step and the input variable for a sub-calculation procedure version record or a sub-decision matrix record.	Small, 53.0	53.0
`passedExplainerTemplateId`	String	ID of the passed explainability message template in the Decision Table lookup procedure step.	Small, 56.0	56.0
`passedMessageTokenMappings`	Expression Set DES Token Mapping	List of the token resource mappings of the passed explainability message template.	Small, 59.0	59.0

Property Name	Type	Description	Filter Group and Version	Available Version
`referenceCalculationProcedureId`	String	The ID of the sub-calculation procedure version record.	Small, 53.0	53.0
`returnMessageValueSet`	String	User-configured messages for the result of the current step. Note: This field is applicable when the step type is `Condition`.	Small, 53.0	53.0
`stage`	String	Indicates whether the expression set version step is a calculation or an aggregation. Note: In version 53.0 and later, only calculation is supported.	Small, 53.0	53.0
`stepType`	String	Indicates whether the expression set version step type is mathematical or lookup. Possible values are: • Condition • Calculation • MatrixLookup • ReferenceProcedure • Branch • ConditionalGroup	Small, 53.0	53.0

Simulation Error Output

Error code and details.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
`errorCode`	String	Error code.	Small, 53.0	53.0
`errorDetails`	String	The details of the error.	Small, 53.0	53.0
`errorMsg`	String	The message stating the reason for error.	Small, 53.0	53.0

Simulation Eval Service Output

Output representation of the simulation run on an expression set.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Sample Responses

This is an example of a simulation run pass.


```
{
   "executionId":"9QMRN00000004Sn4AI_20230112_091636_a091001d",
   "output":{
      "aggregationResults":{

      },
      "calculationResults":[
         {
            "res":25.00
         }
      ]
   },
   "simulationResults":[
      {
         "datatype":"Number",
         "name":"var1",
         "precision":2,
         "value":"25.00"
      },
      {
         "contextValue":{
            "PolicyDetails":[
               {
                  "PolicyName":"Policy1",
                  "TotalMember":"100",
                  "PrincipalAmout":"500",
                  "Status":"Active",
                  "TotalPremium":"1500"
               },
               {
                  "PolicyName":"Policy2",
                  "TotalMember":"200",
                  "PrincipalAmout":"100",
                  "Status":"Inactive",
                  "TotalPremium":"0"
               },
               {
                  "PolicyName":"Policy3",
                  "TotalMember":"300",
                  "PrincipalAmout":"400",
                  "Status":"Active",
                  "TotalPremium":"300"
               }
            ]
         },
         "datatype":"Context",
         "name":"PensionFunds",
         "precision":"",
```

```
        "value":""
    }
],
"simulationStepResults":{
    "ListFilter":{
        "isDefaulted":false,
        "stepErrors":{

        },
        "stepInputs":[
            {
                "name":"PrincipalAmount",
                "contextValue":[
                    "500",
                    "100",
                    "400"
                ],
                "dataType":"Number",
                "value":""
            },
            {
                "name":"PolicyName",
                "contextValue":[
                    "Policy1",
                    "Policy2",
                    "Policy3"
                ],
                "dataType":"Text",
                "value":""
            },
            {
                "name":"TotalMembers",
                "contextValue":[
                    "100",
                    "200",
                    "300"
                ],
                "dataType":"Number",
                "value":""
            },
            {
                "name":"Status",
                "contextValue":[
                    "true",
                    "true",
                    "false"
                ],
                "dataType":"Boolean",
                "value":""
            }
        ]
    },
    "stepResults":[
        {
```

```
            "datatype":"Number",
            "name":"filter_output_total_items",
            "value":"3"
         },
         {
            "datatype":"Number",
            "name":"filter_output_filtered_items",
            "value":"2"
         },
         {
            "name":"filter_output",
            "datatype":"Boolean",
            "contextValue":[
               true,
               false,
               true
            ],
            "value":""
         }
      ]
   },
   "Calculation":{
      "explainabilityMessage":{
         "message":"Pass calculation msg",
         "showConditionDetails":false,
         "showOnlyExecutedPathMessage":true,
         "templateId":"8U8D20000004C9DKAU"
      },
      "isDefaulted":false,
      "stepErrors":{

      },
      "stepInputs":[
         {
            "name":"PrincipalAmount",
            "contextValue":[
               "500",
               "100"
            ],
            "dataType":"Number",
            "value":""
         },
         {
            "name":"TotalMembers",
            "contextValue":[
               "100",
               "200"
            ],
            "dataType":"Number",
            "value":""
         }
      ],
      "stepResults":[
         {
```

```
            "name":"TotalPremium",
            "contextValue":[
               "1500",
               "300"
            ],
            "dataType":"Number",
            "value":""
         }
      ]
   }
}
```

This is an example of a simulation run failure.

```
{
   "error" : {
      "errorCode" : "",
      "errorMsg" : "localized error msg",
      "errorDetail" : "" // stacktrace
   }
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`error`	Simulation Error Output	Error details of the simulation, if any.	Small, 53.0	53.0
`executionId`	String	Execution ID generated after a successful request.	Small, 53.0	53.0
`output`	Simulation Runtime Output on page 1660	Results of the expression set from the simulation.	Small, 54.0	54.0
`simulationResults`	Simulation Variable Output[]	List of output variables of the simulation.	Small, 53.0	53.0
`simulationStepResults`	Map<String, Simulation Step Result Output>	List of steps in the simulation including the inputs and results of each step.	Small, 53.0	53.0

Simulation Runtime Output

Output representation of the results of an expression set from the simulation.

Property Name	Type	Description	Filter Group and Version	Available Version
`aggregationResults`	Map<String, String>	Aggregation results of the expression set from the simulation when the step type is `Aggregation`.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
calculationResults	Map<String, String>[]	Calculation results of the expression set from the simulation when the step type is Calculation.	Small, 54.0	54.0

Simulation Step Explainability Message Output

Output representation of a decision explanation message for a step from the simulation.

Property Name	Type	Description	Filter Group and Version	Available Version
contextTagMessages	String	Explainability messages of the step when context tags are used in the step.	Small, 60.0	60.0
message	String	Decision explanation message of the step.	Small, 56.0	56.0
showConditionDetails	Boolean	For the Condition step type, this property indicates whether the decision explanation includes the condition's details (true) or not (false). The default value for this field is false.	Small, 56.0	56.0
showOnlyExecutedPathMessage	Boolean	For the Branch step type, this property indicates whether the decision explanation includes information about the executed path only (true) or not (false). The default value for this field is true.	Small, 56.0	56.0
templateId	String	Decision explainer template ID of the step.	Small, 56.0	56.0

Simulation Input Variable Basic

Output representation of the details of an input variable of a simulation.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
apiName	String	The API name of the input variable.	Small, 53.0	53.0
dataType	String	The data type of the input variable. Possible values are: • Boolean • Currency • Date	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
		• Number • Percent • Text		
defaultValue	String	The default value of the input variable.	Small, 53.0	53.0
lastSimulatedValue	String	The value of the input variable in the previous simulation.	Small, 53.0	53.0
name	String	The name of the input variable.	Small, 53.0	53.0
precision	String	The floating point precision of the variable.	Small, 53.0	53.0

Simulation Input Variables Result List

Output representation of the list of input variables of a simulation.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Sample Response

```
{
   "code": "200",
   "message": "",
   "isSuccess": true
   "inputVariables": [
     {
         "DataType": "Number",
         "Name": "medicalPayment",
         "ApiName": "medicalPayment",
         "DefaultValue": "10",
         "LastSimulatedValue": "10",
         "Precision": "1"
      }, {
         "DataType": "Number",
         "ApiName": "dedWaiverFactor",
         "Name": "dedWaiverFactor",
         "DefaultValue": "10",
         "LastSimulatedValue": "15",
         "Precision": "1"
      }
   ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The request response code.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
`inputVariables`	Simulation Input Variables Basic[]	The list of input variables of a simulation.	Small, 53.0	53.0
`isSuccess`	Boolean	Indicates whether the request is successful.	Small, 53.0	53.0
`message`	String	The request response message.	Small, 53.0	53.0

Simulation Step Additional Info Output

Information about the decision matrix or sub expression used in a step.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
`stepType`	String	The type of the step. Possible values are: • `DecisionMatrix` • `SubProcedure`	Small, 53.0	53.0
`versionName`	String	The name of the decision matrix version or the sub expression version.	Small, 53.0	53.0
`versionNumber`	String	The version ID of the decision matrix or the sub expression.	Small, 53.0	53.0

Simulation Step Result Output

Output representation of the simulation results of a step.

Property Name	Type	Description	Filter Group and Version	Available Version
`additionalInfo`	Simulation Step Additional Info Output	Additional information if the step type is decision matrix or sub expression.	Small, 53.0	53.0
~~`explainabilityMessage`~~	Simulation Step Explainability Message Output	Decision explanation message for a step.	Small, 56.0	56.0
`isDefaulted`	Boolean	Indicates whether the step has default values (`true`) or not (`false`).	Small, 57.0	57.0
`stepErrors`	Map<String, String>	Errors occurred in a step.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
stepInputs	Simulation Variable Output[]	Input variables of a step.	Small, 53.0	53.0
stepResults	Simulation Variable Output[]	Output variables of a step.	Small, 53.0	53.0

Simulation Variable Output

Output representation of a simulation variable and its value.

Note: This API has been deprecated as of API version 55.0. In API version 55.0 and later, use the new Business APIs in Business Rules Engine.

Property Name	Type	Description	Filter Group and Version	Available Version
contextValue	Object	Context details for running the simulation on an expression set.	Small, 58.0	58.0
datatype		The data type of the variable. Possible values are: • Boolean • Currency • Date • Number • Percent • Text	Small, 53.0	53.0
name	String	Name of the variable.	Small, 53.0	53.0
precision	Integer	Precision of the variable.	Small, 54.0	54.0
value	String	Value of the variable.	Small, 53.0	53.0

Decision Matrix

A decision matrix is a table that looks up information using multiple input dimensions and returns the corresponding output value. Decision matrix is also known as calculation matrix.

Resources

Here's a list of Decision Matrix API (also known as Calculation Matrix) resources.

Request Bodies

Here's a list of Decision Matrix API (also known as Calculation Matrix) request bodies.

Response Bodies

Here's a list of Decision Matrix API (also known as Calculation Matrix) response bodies.

Resources

Here's a list of Decision Matrix API (also known as Calculation Matrix) resources.

Decision Matrix

Retrieve the details for a given decision matrix record (also known as calculation matrix).

Decision Matrices

Get a list of decision matrices (also known as calculation matrix) based on a search text. The API returns a maximum of ten decision matrices records that contain the specified keyword.

Decision Matrix Columns

Retrieve a list of or manage columns in a decision matrix. Use this resource to add new columns, or update or delete existing columns in a decision matrix.

Decision Matrix Version Rows

Retrieve a paginated list of or manage rows in a decision matrix version. Use this resource to add new rows, or update or delete existing rows in a decision matrix version.

Decision Matrix

Retrieve the details for a given decision matrix record (also known as calculation matrix).

Resource

```
/connect/omnistudio/decision-matrices/${matrixId}
```

Example URI

```
/services/data/v53.0/connect/omnistudio/decision-matrices/0lIx0000000000zEAA
```

Available version

53.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Decision Matrix Result

Decision Matrices

Get a list of decision matrices (also known as calculation matrix) based on a search text. The API returns a maximum of ten decision matrices records that contain the specified keyword.

Resource

```
/connect/omnistudio/decision-matrices
```

Example URI

```
/services/data/v53.0/connect/omnistudio/decision-matrices?searchKey=Test
```

Available version

53.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`searchKey`	String	The user-entered search text to retrieve a list of decision matrices.		53.0

Response body for GET

Decision Matrix Result List

Decision Matrix Columns

Retrieve a list of or manage columns in a decision matrix. Use this resource to add new columns, or update or delete existing columns in a decision matrix.

Resource

```
/connect/omnistudio/decision-matrices/${matrixId}/columns
```

Example

```
/services/data/v53.0/connect/omnistudio/decision-matrices/0lIR000000000u0MAA/columns
```

Available version

53.0

Requires Chatter

No

HTTP methods

GET, POST

Path parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`matrixId`	String	The ID of the decision matrix record.	Required	53.0

Response body for GET

Decision Matrix Columns Output

Request body for POST

JSON example

Add a column:

```
{
   "columns" : [ {
      "apiName" : "Name",
      "columnType" : "Input",
      "dataType" : "Text",
      "displaySequence" : 4,
      "name" : "Name"
   }]
}
```

Delete a column:

```
{
   "columns" : [ {
      "action" : "delete",
      "id" : "01JR0000000014bMAA"
   }]
}
```

Update a column:

```
{
   "columns" : [ {
      "id" : "01JR0000000014hMAA",
      "action" : "update",
      "columnType" : "Input",
      "name" : "First Name"
   }]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`columns`	Decision Matrix Column Input[]	List of columns to be added, updated, or deleted in a decision matrix.	Required	53.0

Response body for POST

Decision Matrix Output

Decision Matrix Version Rows

Retrieve a paginated list of or manage rows in a decision matrix version. Use this resource to add new rows, or update or delete existing rows in a decision matrix version.

Resource

```
/connect/omnistudio/decision-matrices/${matrixId}/versions/${versionId}/rows
```

Example

```
/services/data/v53.0/connect/omnistudio/decision-matrices/0lIR000000000u0MAA
/versions/0lNR000000000rFMAQ/rows
```

Available version

53.0

Requires Chatter

No

HTTP methods

GET, POST

Path parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`matrixId`	String	The ID of the decision matrix record.	Required	53.0
`versionId`	String	The ID of the decision matrix version record.	Required	53.0

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`file`	Boolean	Indicates whether to get the rows by generating a CSV file for downloading (`true`) or fetching the rows in JSON format (`false`). The default value is `false`.	Optional	53.0

Response body for GET

Decision Matrix Rows Output

Request body for POST

JSON Example

Add a row:

```
{
   "rows" : [ {
    "rowData" : {
      "Age" : "45",
      "Gender" : "F",
      "Premium" : "2000"
    }
   } ]
}
```

Delete a row:

```
{
   "rows" : [ {
    "rowData" : {
      "id" : "a1j5w000006D04uAAC",
      "action" : "delete"
    }
   } ]
}
```

Update a row:

```
{
   "rows" : [ {
    "rowData" : {
      "id" : "a1j5w000005D04uAAC",
      "Premium" : "1500",
      "action" : "update"
    }
   } ]
}
```

Add row using a CSV file:

```
{
   "fileId" : "f1j5w000005D04uFGC"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`fileId`	String	The ID of the Content Document Version that contains the rows details to be added or updated in a decision matrix version.	Optional Note: This field is required if you're using a CVS file to add or update rows.	53.0
`rows`	Decision Matrix Row Input[]	List of rows to be added, updated, or deleted in a decision matrix version.	Required	53.0

Response body for POST

Decision Matrix Output

Request Bodies

Here's a list of Decision Matrix API (also known as Calculation Matrix) request bodies.

Decision Matrix Columns Input

Input representation of the information to manage columns in relation to a decision matrix.

Decision Matrix Column Input

Input representation of the information required to add, update, or delete columns in a decision matrix.

Decision Matrix Rows Input

Input representation of the information to manage rows in relation to the decision matrix version.

Decision Matrix Row Input

Input representation of the information required to add, update, or delete rows in a decision matrix version.

Decision Matrix Columns Input

Input representation of the information to manage columns in relation to a decision matrix.

JSON example

Add a column:

```
{
   "columns" : [ {
      "apiName" : "Name",
      "columnType" : "Input",
      "dataType" : "Text",
      "displaySequence" : 4,
      "name" : "Name"
   }]
}
```

Delete a column:

```
{
   "columns" : [ {
      "action" : "delete",
      "id" : "0lJR0000000014bMAA"
   }]
}
```

Update a column:

```
{
   "columns" : [ {
      "id" : "0lJR0000000014hMAA",
      "action" : "update",
      "columnType" : "Input",
      "name" : "First Name"
   }]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`columns`	Decision Matrix Column Input[]	List of columns to be added, updated, or deleted in a decision matrix.	Required	53.0

Decision Matrix Column Input

Input representation of the information required to add, update, or delete columns in a decision matrix.

Properties

Name	Type	Description	Required or Optional	Available Version
`action`	String	The type of action you want to perform on a column. Possible values are: • `delete` • `update`	Required Note: Leave this field blank if you're adding a column in a decision matrix.	53.0
`apiName`	String	The API name of a column.	Optional	53.0
`columnType`	String	The type of a column. Possible values are: • `Input` • `Output`	Required	53.0
`dataType`	String	The data type of a column.	Optional	53.0
`displaySequence`	Integer	The display sequence of a column.	Optional	53.0
`id`	String	The ID of the column record to be updated or deleted.	Required Note: Leave this field blank if you're adding a column in a decision matrix.	53.0
`name`	String	The name of a column.	Required	53.0
`rangeValues`	String	The range values of a column. The range columns contain a sorted list of comma-separated values, which are updated whenever a row is added to the Decision Matrix Version.	Optional	53.0

Decision Matrix Rows Input

Input representation of the information to manage rows in relation to the decision matrix version.

JSON Example

Add a row:

```
{
   "rows" : [ {
    "rowData" : {
      "Age" : "45",
      "Gender" : "F",
      "Premium" : "2000"
    }
   } ]
}
```

Delete a row:

```
{
   "rows" : [ {
    "rowData" : {
      "id" : "a1j5w000006D04uAAC",
      "action" : "delete"
    }
   } ]
}
```

Update a row:

```
{
   "rows" : [ {
    "rowData" : {
      "id" : "a1j5w000005D04uAAC",
      "Premium" : "1500",
      "action" : "update"
    }
   } ]
}
```

Add row using a CSV file:

```
{
   "fileId" : "f1j5w000005D04uFGC"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`fileId`	String	The ID of the Content Document Version that contains the rows details to be added or updated in a decision matrix version.	Optional Note: This field is required if you're using	53.0

Name	Type	Description	Required or Optional	Available Version
			a CVS file to add or update rows.	
`rows`	Decision Matrix Row Input[]	List of rows to be added, updated, or deleted in a decision matrix version.	Required	53.0

Decision Matrix Row Input

Input representation of the information required to add, update, or delete rows in a decision matrix version.

Properties

Name	Type	Description	Required or Optional	Available Version
`action`	String	The type of action you want to perform on a row. Possible values are: • `delete` • `update`	Required Note: Leave this field blank if you're adding a row in a decision matrix version.	53.0
`id`	String	The ID of the row record to be updated or deleted.	Required Note: Leave this field blank if you're adding a row to a decision matrix version.	53.0
`name`	String	The name of the row.	Optional	53.0
`rowData`	Map<String, Object>	The key value pair of the row.	Required	53.0

Response Bodies

Here's a list of Decision Matrix API (also known as Calculation Matrix) response bodies.

Decision Matrix Basic
Output representation of the decision matrices details.

Decision Matrix Result
Output representation of the decision matrix details.

Decision Matrix Result List
Output representation of the decision matrix result list.

Decision Matrix Variable
Details of the input or output variables of a decision matrix.

Decision Matrix Columns Output
Output representation of columns of a decision matrix.

Decision Matrix Column Output
Representation of the details of a column in a decision matrix.

Decision Matrix Rows Output
Output representation of rows of a decision matrix version.

Decision Matrix Row Output
Representation of the details of a row in a decision matrix version.

Decision Matrix Output
Output representation the action performed on a decision matrix version.

Decision Matrix Basic

Output representation of the decision matrices details.

Sample Response

```
{
   "decisionMatrices" : [ {
      "id" : "0lIx0000000001TEAQ",
      "name" : "Decision_Matrix_Test1"
   } ],
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
`description`	String	The description of the decision matrix.	Small, 53.0	53.0
`id`	String	The ID of the decision matrix record.	Small, 53.0	53.0
`name`	String	The name of the decision matrix.	Small, 53.0	53.0

Decision Matrix Result

Output representation of the decision matrix details.

Sample Response

```
{
   "code" : "200",
```

```
    "id" : "0lIx0000000000zEAA",
    "inputVariables" : [ {
       "dataType" : "Number",
       "id" : "0lJx0000000000zEAA",
       "name" : "IN1"
    }, {
       "dataType" : "Text",
       "id" : "0lJx00000000010EAA",
       "name" : "IN2"
    }, {
       "dataType" : "Text",
       "id" : "0lJx00000000011EAA",
       "name" : "IN3"
    }, {
       "dataType" : "Text",
       "id" : "0lJx00000000012EAA",
       "name" : "IN4"
    } ],
    "isSuccess" : true,
    "message" : "",
    "name" : "DescisionMatrix2",
    "outputVariables" : [ {
       "dataType" : "Text",
       "id" : "0lJx00000000013EAA",
       "name" : "OUT1"
    }, {
       "dataType" : "Text",
       "id" : "0lJx00000000014EAA",
       "name" : "OUT2"
    } ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The request response code.	Small, 53.0	53.0
description	String	The description of the decision matrix.	Small, 53.0	53.0
id	String	The ID of the decision matrix record.	Small, 53.0	53.0
inputVariables	Decision Matrix Variable[]	The list of input variables of the decision matrix.	Small, 53.0	53.0
isSuccess	Boolean	Indicates whether the request is successful.	Small, 53.0	53.0
message	String	The request response message.	Small, 53.0	53.0
name	String	The name of the decision matrix.	Small, 53.0	53.0
outputVariables	Decision Matrix Variable[]	The list of output variables of the decision matrix.	Small, 53.0	53.0

Decision Matrix Result List

Output representation of the decision matrix result list.

Sample Response

```
{
   "code" : "200",
   "decisionMatrices" : [ {
      "id" : "0lIx0000000001TEAQ",
      "name" : "Decision_Matrix_Test1"
   }, {
      "id" : "0lIx0000000000pEAA",
      "name" : "Decision_Matrix_Test2”
   }, {
      "id" : "0lIx0000000001OEAQ",
      "name" : "Decision_Matrix_Test3”
   } ],
   "isSuccess" : true,
   "message" : ""
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
code	String	The request response code.	Small, 53.0	53.0
decisionMatrices	Decision Matrix Basic[]	The list of the decision matrices.	Small, 53.0	53.0
isSuccess	Boolean	Indicates whether the request was successful.	Small, 53.0	53.0
message	String	The request response message.	Small, 53.0	53.0

Decision Matrix Variable

Details of the input or output variables of a decision matrix.

Sample Response

```
{
      "dataType" : "Text",
      "id" : "0lJx00000000010EAA",
      "name" : "IN2"
   }
```

Property Name	Type	Description	Filter Group and Version	Available Version
dataType	String	The data type of the variable.	Small, 53.0	53.0
id	String	The ID of the variable record.	Small, 53.0	53.0
name	String	The name of the variable.	Small, 53.0	53.0

Decision Matrix Columns Output

Output representation of columns of a decision matrix.

JSON example

```
{
   "columns" : [ {
      "apiName" : "Age",
      "columnType" : "Input",
      "dataType" : "Number",
      "displaySequence" : 1,
      "id" : "01JR0000000014aMAA",
      "name" : "Age",
      "rangeValues" : null
   }, {
      "apiName" : "Gender",
      "columnType" : "Input",
      "dataType" : "Text",
      "displaySequence" : 2,
      "id" : "01JR0000000014bMAA",
      "name" : "Gender",
      "rangeValues" : null
   }, {
      "apiName" : "Premium",
      "columnType" : "Output",
      "dataType" : "Number",
      "displaySequence" : 3,
      "id" : "01JR0000000014fMAA",
      "name" : "Premium",
      "rangeValues" : null
   } ]
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
columns	Decision Matrix Column Output[]	The list of columns in a decision matrix.	Small, 53.0	53.0

Decision Matrix Column Output

Representation of the details of a column in a decision matrix.

Property Name	Type	Description	Filter Group and Version	Available Version
apiName	String	The API name of a column.	Small, 53.0	53.0
columnType	String	The type of column.	Small, 53.0	53.0
dataType	String	The data type of a column.	Small, 53.0	53.0
displaySequence	Integer	The display sequence of a column.	Small, 53.0	53.0

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	The ID of a column.	Small, 53.0	53.0
name	String	The name of a column.	Small, 53.0	53.0
rangeValues	String	The range value of a column.	Small, 53.0	53.0

Decision Matrix Rows Output

Output representation of rows of a decision matrix version.

JSON example

```
   "message" : null,
   "rows" : [ {
      "id" : "a1j5w000005D04uAAC",
      "name" : "303b5c8988601647873b4ffd247d83cb",
      "rowData" : {
         "Age" : 45,
         "Gender" : "F",
         "Premium" : 2000
      }
   } ],
   "totalRows" : 1
}
```

Property Name	Type	Description	Filter Group and Version	Available Version
message	String	The error message in case of failure.	Small, 53.0	53.0
rows	Decision Matrix Row Output[]	The list of rows in a decision matrix version.	Small, 53.0	53.0
totalRows	Integer	The total count of rows retrieved.	Small, 53.0	53.0

Decision Matrix Row Output

Representation of the details of a row in a decision matrix version.

Property Name	Type	Description	Filter Group and Version	Available Version
id	String	The ID of the row in a decision matrix version.	Small, 53.0	53.0
name	String	The name of the row.	Small, 53.0	53.0
rowData	Map<String, Object>	The key value pair of the row.	Small, 53.0	53.0

Decision Matrix Output

Output representation the action performed on a decision matrix version.

Property Name	Type	Description	Filter Group and Version	Available Version
`errorFileId`	String	The ID of the error file containing failed records.	Small, 53.0	53.0
`errors`	String[]	The request response error.	Small, 53.0	53.0
`message`	String	The request response message.	Small, 53.0	53.0
`success`	Boolean	Indicates whether the request is successful.	Small, 53.0	53.0

CHAPTER 22 Outcome Management Developer Guide

In this chapter ...

- Introduction to Outcome Management
- Outcome Management Data Model
- Outcome Management Standard Objects

Use Outcome Management to define, measure, and evaluate an organization's outcome strategy. Set time-bound targets and baseline values and track results. Consistently measure the same indicators across different outcomes or programs. Organize outcomes into groups to reflect an organizational strategy, like a logic model or a set of outcomes that external stakeholders care about.

Introduction to Outcome Management

Use Outcome Management to define, measure, and evaluate an organization's outcome strategy. Set time-bound targets and baseline values and track results. Consistently measure the same indicators across different outcomes or programs. Organize outcomes into groups to reflect an organizational strategy, like a logic model or a set of outcomes that external stakeholders care about.

EDITIONS

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

SEE ALSO:

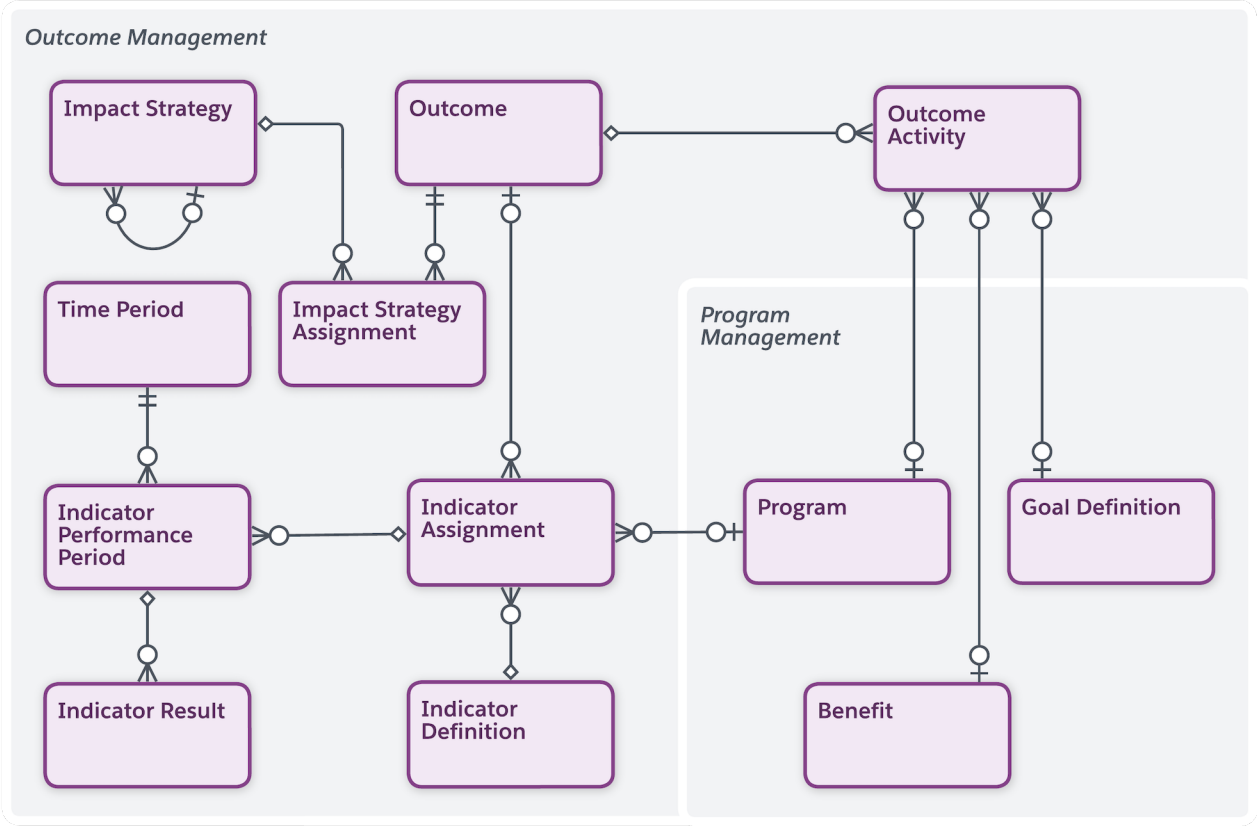
Salesforce Help: Outcome Management

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**.

SEE ALSO:

Map Your Impact Strategy to Outcome Management

Outcome Management Standard Objects

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.

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.

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.

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.

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.

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.

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.

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.

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.

UnitOfMeasure

Represents the unit of measures for care metrics and care observations. This object is available in API version 49.0 and later.

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.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Nillable, Update **Description** The description about the impact strategy.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this impact strategy.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this impact strategy.
`Level`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the level or scope of the impact strategy. Possible values are: • `Department` • `Organizational`

Field	Details
	• `Program`
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the impact strategy.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The associated parent impact strategy. This field is a relationship field. **Relationship Name** ParentImpactStrategy **Relationship Type** Lookup **Refers To** ImpactStrategy
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description Specifies the status of the impact strategy. Possible values are: • `Active` • `Canceled` • `Completed` • `Planned`
`Type`	**Type** 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`

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.

ImpactStrategyFeed
Feed tracking is available for the object.

ImpactStrategyHistory
History is available for tracked fields of the object.

ImpactStrategyOwnerSharingRule
Sharing rules are available for the object.

ImpactStrategyShare
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.

Fields

Field	Details
`ImpactStrategyId`	**Type** 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`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this impact strategy assignment.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this impact strategy assignment.
`Name`	**Type** string

Field	Details
	Properties Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The unique number of the impact strategy assignment.
`OutcomeId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The outcome associated with this impact strategy assignment. This field is a relationship field. **Relationship Name** Outcome **Relationship Type** Lookup **Refers To** Outcome

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.

ImpactStrategyAssignmentFeed
Feed tracking is available for the object.

ImpactStrategyAssignmentHistory
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.

Fields

Field	Details
`IndicatorAssignmentType`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the object that the indicator assignment measures. Possible values are: • `Outcome` • `Program`
`IndicatorDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** 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
`IntendedDirection`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** 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:

Field	Details
	• `Decrease` • `Increase` • `Maintain`
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the indicator assignment.
`OutcomeId`	**Type** 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

Field	Details
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The owner of this indicator assignment. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`ProgramId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program that the indicator assignment measures. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the indicator assignment. Possible values are: • `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.

IndicatorAssignmentFeed
Feed tracking is available for the object.

IndicatorAssignmentHistory
History is available for tracked fields of the object.

IndicatorAssignmentOwnerSharingRule
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.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the indicator definition.
`FlowDefinitionApiName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update

Field	Details
	Description The API name of the flow definition associated with the indicator definition. This field is available from API version 60.0 and later.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this indicator definition.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this indicator definition.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the indicator definition.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns the outcome. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`Status`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** Specifies the status of the indicator definition. Possible values are: • `Active` • `Canceled` • `Completed` • `Planned`
`UnitOfMeasureId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** 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 **Relationship Type** Lookup **Refers To** UnitOfMeasure

Associated Objects

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

IndicatorDefinitionFeed
Feed tracking is available for the object.

IndicatorDefinitionHistory
History is available for tracked fields of the object.

IndicatorDefinitionOwnerSharingRule
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.

Fields

Field	Details
`BaselineDescription`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the baseline value.
`BaselineValue`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The value of the indicator assignment at the beginning of the indicator performance period.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the indicator performance period.

Field	Details
IndicatorAssignmentId	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The indicator assignment that's associated with the indicator performance period. This field is a relationship field. **Relationship Name** IndicatorAssignment **Relationship Type** Master-Detail **Refers To** IndicatorAssignment
LastReferencedDate	**Type** 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.
LastResultMeasurementDate	**Type** date **Properties** Filter, Group, Nillable, Sort **Description** The date when the last result value was measured. This field is a calculated field.
LastResultValue	**Type** double **Properties** Filter, Nillable, Sort **Description** The result value from the most recently measured indicator result. This field is a calculated field.
LastViewedDate	**Type** dateTime

Field	Details
	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.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the indicator performance period.
`TargetProgress`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** Specifies the progress of the target within the time period. Possible values are: • `At Risk` • `Complete` • `Not Met` • `Not Started` • `On Track`
`TargetValue`	**Type** double **Properties** Create, Filter, Nillable, Sort, Update **Description** The target value of the indicator assignment within the time period.
`TimePeriodId`	**Type** 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.

Field	Details
	Relationship Name TimePeriod **Relationship Type** Lookup **Refers To** 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.

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.

Fields

Field	Details
`CalculationMethod`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** 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`	**Type** double **Properties** Create, Filter, Nillable, Sort **Description** The denominator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the indicator result.
`FlowDefinitionApiName`	**Type** 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`	**Type** int **Properties** Create, Filter, Group, Nillable, Sort **Description** The version of the flow that calculated this result. This field is available from API version 60.0 and later.
`IndicatorPerformancePeriodId`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** 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`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this indicator result.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this indicator result.
`MeasurementDate`	**Type** date **Properties** Create, Filter, Group, Sort, Update **Description** The date on which the indicator result is measured.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the indicator result.

Field	Details
`Numerator`	**Type** double **Properties** Create, Filter, Nillable, Sort **Description** The numerator in automatically-calculated results that are an average or percent. This field is available from API version 60.0 and later.
`ResultValue`	**Type** double **Properties** Create, Filter, Sort, Update **Description** The result for the indicator performance period.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** Specifies the type of the result for the time period. Possible values are: • `Final` • `Interim`

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.

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.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The description of the outcome.
`IntendedDirection`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** 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`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this outcome.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description Date and time when a user last viewed this outcome.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the outcome.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns the outcome. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`SourceName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the source that initially defined the outcome. For example, United Nations Sustainable Development Goals (UNSDG).
`Status`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** Specifies the status of the outcome. Possible values are: • `Active` • `Canceled`

Field	Details
	• `Completed` • `Planned`
`Term`	**Type** picklist **Properties** 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`

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.

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.

Fields

Field	Details
`BenefitId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The benefit that's associated with the outcome. This field is a relationship field. **Relationship Name** Benefit **Relationship Type** Lookup **Refers To** Benefit
`GoalDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** dateTime **Properties** Filter, Nillable, Sort

Field	Details
	Description Date and time when a user last referenced this outcome activity.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this outcome activity.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the outcome activity.
`OutcomeActivityType`	**Type** picklist **Properties** Create, Filter, Group, Sort, Update **Description** The type of activity that's associated with the outcome, such as program, benefit. Possible values are: • `Benefit` • `Goal Definition` This value is available from API version 60.0 and later. • `Program`
`OutcomeId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** 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

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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 **Refers To** Group, User
ProgramId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The program that's associated with the outcome. This field is a relationship field. **Relationship Name** Program **Relationship Type** Lookup **Refers To** Program

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.

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.

Fields

Field	Details
`EndDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The end date and time of the time period.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last referenced this time period.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** Date and time when a user last viewed this time period.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The name of the time period.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns the time period. This field is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
`StartDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The start date and time of the time period.

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.

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()`

Fields

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

Field	Details
	Properties Create, Defaulted on create, Filter, Group, Sort, Update **Description** The ID of the user who owns this record.
`Type`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** The type of the unit of measure. For example, weight, distance, period.
`UnitCode`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** The code for this unit of measure. For example, mm[Hg], mcg/mL., kgs, lbs.

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.

UnitOfMeasureChangeEvent (API version 59.0)
Change events are available for the object.

UnitOfMeasureOwnerSharingRule
Sharing rules are available for the object.

UnitOfMeasureShare
Sharing is available for the object.

CHAPTER 23 Record Alerts

In this chapter ...

- Record Alerts Standard Objects
- Apex Reference
- Record Alerts APIs
- Record Alerts Metadata API Types
- Record Alerts Tooling API Objects

The Record Alerts system continuously monitors activities on Salesforce object records. As alerts generate, you can perform an action to snooze the alerts for a specified time or dismiss them.

Record Alerts Standard Objects

Use standard objects to create and update record alerts.

RecAlrtDataSrcExpSetDef
Represents information about the data source for a record alert and the association with an expression set definition. This object is available in API version 58.0 and later.

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

RecordAlertActionableTarget
Represents the action associated with the parent record alert. This object is available in API version 63.0 and later.

RecordAlertCategory
Represents a category to group and present record alerts. This object is available in API version 54.0 and later.

RecordAlertCategoryLocalization
Represents the translated label of a RecordAlertCategory metadata type. This object is available in API version 54.0 and later.

RecordAlertDataSource
Represents an internal or external source for record alert data. This object is available in API version 54.0 and later.

RecordAlertDataTranslation
Represents the translated values of the data stored within a RecordAlert record's fields. This object is available in API version 54.0 and later.

RecordAlertTemplate
A template that is shown in the Alerts FlexCard when the expression set requirements are met. This object is available in API version 55.0 and later.

RecAlrtDataSrcExpSetDef

Represents information about the data source for a record alert and the association with an expression set definition. This object is available in API version 58.0 and later.

Supported Calls

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

Fields

Field	Details
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description A unique name of a record alert expression set definition
`ExpressionSetDefinitionId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The expression set definition that's associated with the data source of a record alert. This field is a relationship field. **Relationship Name** ExpressionSetDefinition **Relationship Type** Lookup **Refers To** ExpressionSetDefinition
`ExpressionSetObject`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the name of the object that's related to the expression set. Possible values are: • `Account` • `AccountBrand`—Account Brand • `AccountParticipant`—Account Participant • `ActionPlan`—Action Plan • `Activity` • `Address` • `AppFormProductParticipant`—Application Form Product Participant • `Applicant` • `ApplicationActionItem`—Application Action Item • `ApplicationForm`—Application Form • `ApplicationFormEvaluation`—Application Form Evaluation • `ApplicationFormParticipant`—Application Form Participant • `ApplicationFormProduct`—Application Form Product • `ApplicationFormProductDev`—Application Form Product Deviation • `ApplicationFormProductFee`—Application Form Product Fee

Field	Details
	• `ApplicationFormProductProposal`—Application Form Product Proposal • `Asset` • `AssetRelationship`—Asset Relationship • `AssociatedLocation`—Associated Location • `AsyncOperationTracker`—Async Operation Tracker • `AttributeAdjustmentCondition`—Attribute Adjustment Condition • `AttributeBasedAdjRule`—Attribute Based Adjustment Rule • `AttributeBasedAdjustment`—Attribute Based Adjustment • `AttributeCategory`—Attribute Category • `AttributeCategoryAttribute`—Attribute Category Attribute • `AttributeDefinition`—Attribute Definition • `AttributePicklist`—Attribute Picklist • `AttributePicklistValue`—Attribute Picklist Value • `AuthFormRequestRecord`—Authorizable Form Request Record • `AuthorizationForm`—Authorization Form • `AuthorizationFormConsent`—Authorization Form Consent • `AuthorizationFormDataUse`—Authorization Form Data Use • `AuthorizationFormText`—Authorization Form Text • `AuthorizedInsuranceLine`—Authorized Insurance Line • `Award` • `Banker` • `BranchUnit`—Branch Unit • `BranchUnitBusinessMember`—Branch Unit Business Member • `BranchUnitCustomer`—Branch Unit Customer • `BranchUnitRelatedRecord`—Branch Unit Related Record • `BundleBasedAdjustment`—Bundle Based Adjustment • `BusinessBrand`—Business Brand • `BusinessLicense`—Business License • `BusinessMilestone`—Business Milestone • `BusinessProfile`—Business Profile • `CalcMatrixColumnRange`—Decision Matrix Column Range • `CalcProcStepRelationship`—Expression Set Step Relationship • `CalculationMatrix`—Decision Matrix • `CalculationMatrixColumn`—Decision Matrix Column • `CalculationMatrixRow`—Decision Matrix Row • `CalculationMatrixVersion`—Decision Matrix Version • `CalculationProcedure`—Calculation Procedure • `CalculationProcedureStep`—Calculation Procedure Step

Field	Details
	• `CalculationProcedureVariable`—Calculation Procedure Variable • `CalculationProcedureVersion`—Calculation Procedure Version • `Case` • `CaseParticipant`—Case Participant • `Claim` • `ClaimCoverage`—Claim Coverage • `ClaimItem`—Claim Item • `ClaimParticipant`—Claim Participant • `ClaimPaymentSummary`—Claim Payment Summary • `ClaimTeamMember`—Claim Team Member • `CodeSet`—Code Set • `CodeSetBundle`—Code Set Bundle • `CommSubscription`—Communication Subscription • `CommSubscriptionChannelType`—Communication Subscription Channel Type • `CommSubscriptionConsent`—Communication Subscription Consent • `CommSubscriptionTiming`—Communication Subscription Timing • `ComplianceControl`—Compliance Control • `ComplianceProcedure`—Compliance Procedure • `ComplianceProcedureVersion`—Compliance Procedure Version • `Contact` • `ContactPointAddress`—Contact Point Address • `ContactPointConsent`—Contact Point Consent • `ContactPointEmail`—Contact Point Email • `ContactPointPhone`—Contact Point Phone • `ContactPointTypeConsent`—Contact Point Type Consent • `ContactRequest`—Contact Request • `ContentVersion`—Content Version • `Contract` • `CustomObjectParticipant`—Participant • `Customer` • `CustomerProperty`—Customer Property • `DataUseLegalBasis`—Data Use Legal Basis • `DataUsePurpose`—Data Use Purpose • `DelegatedAccount`—External Managed Account • `Deviation` • `DistributorAuthorization`—Distributor Authorization • `DocChkItemValidatedTarget`—Document Checklist Item Validated Target • `DocumentChecklistItem`—Document Checklist Item

Field	Details
	• `DocumentDecisionRequirement`—Document Decision Requirement • `DuplicateRecordItem`—Duplicate Record Item • `DuplicateRecordSet`—Duplicate Record Set • `EmailMessage`—Email Message • `EngagementChannelType`—Engagement Channel Type • `Event` • `ExpressionSet`—Expression Set • `ExpressionSetVersion`—Expression Set Version • `FinancialGoal`—Financial Goal • `FinancialGoalFunding`—Financial Goal Funding • `FinancialGoalParty`—Financial Goal Party • `FinancialPlan`—Financial Plan • `FlowOrchestrationInstRelaObj`—Flow Orchestration Instance Related Obj • `FlowOrchestrationInstance`—Orchestration Run • `FlowOrchestrationStageInstance`—Orchestration Stage Run • `FlowOrchestrationStepInstance`—Orchestration Step Run • `FlowOrchestrationWorkItem`—Orchestration Work Item • `ForecastingCustomData`—Forecasting Custom Data • `ForecastingItem__hd`—Forecasting Item (Historical) • `Idea` • `IdentityDocument`—Identity Document • `Image` • `IndexRate`—Index Rate • `Individual` • `InfoAuthRequestForm`—Info Authorization Request Form • `InfoAuthorizationRequest`—Info Authorization Request • `InformationVerification`—Information Verification • `InsPolicyTransactionDetail`—Insurance Policy Transaction Detail • `InsurancePolicy`—Insurance Policy • `InsurancePolicyAsset`—Insurance Policy Asset • `InsurancePolicyCoverage`—Insurance Policy Coverage • `InsurancePolicyParticipant`—Insurance Policy Participant • `InsurancePolicySurcharge`—Insurance Policy Surcharge • `InsurancePolicyTransaction`—Insurance Policy Transaction • `InsuranceProfile`—Insurance Profile • `Lead` • `LegalEntity`—Legal Entity • `LoanApplicant`—Loan Applicant

Field	Details
	• `LoanApplicantAddress`—Loan Applicant Address • `LoanApplicantAsset`—Loan Applicant Asset • `LoanApplicantDeclaration`—Loan Applicant Declaration • `LoanApplicantEmployment`—Loan Applicant Employment • `LoanApplicantIncome`—Loan Applicant Income • `LoanApplicantLiability`—Loan Applicant Liability • `LoanApplicationAsset`—Loan Application Asset • `LoanApplicationFinancial`—Loan Application Financial • `LoanApplicationLiability`—Loan Application Liability • `LoanApplicationProperty`—Loan Application Property • `LoanApplicationTitleHolder`—Loan Application Title Holder • `Location` • `LocationTrustMeasure`—Location Trust Measure • `MultipartyInfoAuthRequest`—Multiparty Information Authorization Request • `OmniDataPack`—Omni DataPack • `OmniDataTransform`—Omni Data Transformation • `OmniDataTransformItem`—Omni Data Transformation Item • `OmniESignatureTemplate`—Omni Electronic Signature Template • `OmniProcess`—Omni Process • `OmniProcessCompilation`—Omni Process Compilation • `OmniProcessElement`—Omni Process Element • `OmniProcessTransientData`—Omni Process Transient Data • `OmniScriptSavedSession`—OmniScript Saved Session • `OmniUiCard`—Omni UI Card • `Opportunity` • `OpportunityContactRole`—Opportunity Contact Role • `OpportunityLineItem`—Opportunity Product • `Order` • `OrderItem`—Order Product • `PartyConsent`—Party Consent • `PartyCreditProfile`—Party Credit Profile • `PartyExpense`—Party Expense • `PartyFinancialLiability`—Party Financial Liability • `PartyFinclLiabAddlBrwr`—Party Fincl Liability Addl Borrower • `PartyIdentityVerification`—Party Identity Verification • `PartyIdentityVerificationStep`—Party Identity Verification Step • `PartyIncome`—Party Income • `PartyProfile`—Party Profile

Field	Details
	• `PartyProfileAddress`—Party Profile Address • `PartyProfileParticipant`—Party Profile Participant • `PartyProfileRisk`—Party Profile Risk • `PartyScreeningStep`—Party Screening Step • `PartyScreeningSummary`—Party Screening Summary • `PaymentMandate`—Payment Mandate • `PersonEducation`—Person Education • `PersonEmployment`—Person Employment • `PersonLifeEvent`—Person Life Event • `Pricebook2`—Price Book • `PricebookEntry`—Price Book Entry • `ProcessException`—Process Exception • `Producer` • `ProducerCommission`—Producer Commission • `Product2`—Product • `ProductAttributeDefinition`—Product Attribute Definition • `ProductCatalog`—Catalog • `ProductCategory`—Category • `ProductCategoryDisqual`—Product Category Disqualification • `ProductCategoryProduct`—Product Category Product • `ProductCategoryQualification`—Product Category Qualification • `ProductClassification`—Product Classification • `ProductClassificationAttr`—Product Classification Attribute • `ProductComponentGroup`—Product Component Group • `ProductComponentGrpOverride`—Product Component Group Override • `ProductDisqualification`—Product Disqualification • `ProductFee`—Product Fee • `ProductListRate`—Product List Rate • `ProductQualification`—Product Qualification • `ProductRelComponentOverride`—Product Related Component Override • `ProfileSkill`—Skill • `ProfileSkillEndorsement`—Endorsement • `ProfileSkillUser`—Skill User • `PublicComplaint`—Public Complaint • `QuickText`—Quick Text • `RajAppForm__c`—RajAppForm • `ReceivedDocument`—Received Document • `ReceivedDocumentType`—Received Document Type

Field	Details
	• `Recommendation` • `RecordAction` • `RecordAggregationResult`—Record Aggregation Result • `RecordAlert`—Record Alert • `ResidentialLoanApplication`—Residential Loan Application • `RevenueAsyncOperation`—Revenue Async Operation • `RevenueTransactionErrorLog`—Revenue Transaction Error Log • `Scorecard` • `ScorecardAssociation`—Scorecard Association • `ScorecardMetric`—Scorecard Metric • `SecuritiesHolding`—Securities Holding • `Seller` • `SocialPersona`—Social Persona • `SocialPost`—Social Post • `Solution` • `TagCategory`—Tag Category • `Task` • `User` • `UserProvisioningRequest`—User Provisioning Request • `WorkBadge`—Badge Received • `WorkBadgeDefinition`—Badge • `WorkOrder`—Work Order • `WorkOrderLineItem`—Work Order Line Item • `WorkThanks`—Thanks • `WorkerCompCoverageClass`—Worker Compensation Coverage Class • `devopsimpkg13__DRBatchQueue__c`—Vlocity Omnistudio Data Mapper Batch Queue • `devopsimpkg13__DRBulkData__c`—Omnistudio Data Mapper Bulk Data • `devopsimpkg13__Interface_DRGeneric__c`—Vlocity Omnistudio Data Mapper Object Interface • `devopsimpkg13__PDFTronEncryptionKey__mdt`—PDFTron Encryption Key • `devopsimpkg13__TestResult__c`—Test Result • `devopsimpkg13__VlocityDataPack__c`—Vlocity DataPack Object • `devopsimpkg13__VlocityDocuSignTemplate__c`—Vlocity DocuSign Template • `devopsimpkg13__VlocityErrorLogEntry__c`—Vlocity Error Log Entry • `devopsimpkg13__VlocityScheduledJob__c`—Vlocity Scheduled Job • `devopsimpkg13__VlocityTrackingEntry__c`—Vlocity Tracking Entry

Field	Details
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Indicates whether the record alert data source is active (true) or not (false). The default value is `false`.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the expression set definition Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description A unique name of a record alert data source expression set definition.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** A namespace prefix associated with this object.
`RecordAlertDataSourceId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The data source of the record alert that's associated with an expression set. This field is a relationship field. **Relationship Name** RecordAlertDataSource **Relationship Type** Lookup **Refers To** RecordAlertDataSource

RecordAlert

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

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string

Field	Details
	Properties Create, Filter, Group, Nillable, Sort, Update **Description** A detailed description of the alert.
`EffectiveDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time that the alert was generated or became active.
`IsActive`	**Type** boolean **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** Whether the alert is still active (`true`) or has been dismissed (`false`). The default value is '`false`'.
`LastReferencedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed a record related to this record.
`LastViewedDate`	**Type** dateTime **Properties** Filter, Nillable, Sort **Description** The timestamp for when the current user last viewed this record. If this value is null, it's possible that this record was referenced (LastReferencedDate) and not viewed.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record alert.

Field	Details
OwnerId	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** ID of the user who created the record alert. This is a polymorphic relationship field. **Relationship Name** Owner **Relationship Type** Lookup **Refers To** Group, User
ParentId	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The user, account, or contact associated with the alert. This is a polymorphic relationship field. **Relationship Name** Parent **Relationship Type** Lookup **Refers To** Account, Case, Contact, DisputeConfig__c, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c, FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, FinancialTransactionDisputeInfo__c, Lead, LoanApplicant, LoanApplicantEmployment, LoanApplicantIncome, LoanApplicationAsset, LoanApplicationFinancial, LoanApplicationLiability, LoanApplicationProperty, Opportunity,

Field	Details
	ResidentialLoanApplication, ServiceRequest__c, TestCM__c, User, Vehicle__c, vlocity_lwc27__CardFrameworkConfiguration__c, vlocity_lwc27__DRBatchQueue__c, vlocity_lwc27__DRBulkData__c, vlocity_lwc27__DREncryption__c, vlocity_lwc27__DRWorker__c, vlocity_lwc27__Interface_DRGeneric__c, vlocity_lwc27__TestResult__c, vlocity_lwc27__TriggerSetup__c, vlocity_lwc27__UISettings__c, vlocity_lwc27__VlocityDataPack__c, vlocity_lwc27__VlocityDocuSignTemplate__c, vlocity_lwc27__VlocityErrorLogEntry__c, vlocity_lwc27__VlocityScheduledJob__c, vlocity_lwc27__VlocityTrackingEntry__c
`RecordAlertCategoryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category for the alert. This is a relationship field. **Relationship Name** RecordAlertCategory **Relationship Type** Lookup **Refers To** RecordAlertCategory
`Severity`	**Type** picklist **Properties** Create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The severity of the alert, which can be pulled from the Record Alert Category or overridden. Possible Education Cloud values are: • `High` • `Low` • `Medium` Possible Financial Service Cloud values are: • `Error` • `Info` • `Minor` • `Warning`
`SnoozeUntilDate`	**Type** dateTime

Field	Details
	Properties Create, Filter, Nillable, Sort, Update **Description** The date the alert is delivered.
`SourceSystemIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The unique identifier for the alert in an external system.
`Subject`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A short description of the alert.
`ValidUntilDate`	**Type** dateTime **Properties** Create, Filter, Sort, Update **Description** The date and time when the alert becomes invalid.
`WhatId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The record that the alert pertains to. This is a polymorphic relationship field. **Relationship Name** What **Relationship Type** Lookup **Refers To** Account, Asset, BusinessMilestone, Case, Claim, Contact, Contract, DisputeConfig__c, FinServ__AccountAccountRelation__c, FinServ__Alert__c, FinServ__AssetsAndLiabilities__c, FinServ__B2CLeadCompanyNameConfig__c, FinServ__BillingStatement__c,

Field	Details
	FinServ__Card__c, FinServ__ChargesAndFees__c, FinServ__ContactContactRelation__c, FinServ__Education__c, FinServ__Employment__c, FinServ__FinancialAccountRole__c, FinServ__FinancialAccountTransaction__c, FinServ__FinancialAccount__c, FinServ__FinancialGoal__c, FinServ__FinancialHolding__c, FinServ__IdentificationDocument__c, FinServ__IndustriesAppConfig__c, FinServ__IndustriesSettings__c, FinServ__LifeEvent__c, FinServ__NextLastInteractionSettings__c, FinServ__PolicyPaymentMethod__c, FinServ__ReciprocalRole__c, FinServ__Record_Rollup_Configuration__c, FinServ__Revenue__c, FinServ__RollupByLookupConfig__c, FinServ__RollupByLookupFilterCriteria__c, FinServ__Securities__c, FinServ__UsePersonAccount__c, FinServ__WealthAppConfig__c, FinServ__individualExcludedFields__c, FinancialTransactionDisputeInfo__c, InsurancePolicy, InsurancePolicyCoverage, Lead, LoanApplicant, LoanApplicantEmployment, LoanApplicantIncome, LoanApplicationAsset, LoanApplicationFinancial, LoanApplicationLiability, LoanApplicationProperty, Opportunity, PersonLifeEvent, ResidentialLoanApplication, ServiceRequest__c, TestCM__c, Vehicle__c, vlocity_lwc27__CardFrameworkConfiguration__c, vlocity_lwc27__DRBatchQueue__c, vlocity_lwc27__DRBulkData__c, vlocity_lwc27__DREncryption__c, vlocity_lwc27__DRWorker__c, vlocity_lwc27__Interface_DRGeneric__c, vlocity_lwc27__TestResult__c, vlocity_lwc27__TriggerSetup__c, vlocity_lwc27__UISettings__c, vlocity_lwc27__VlocityDataPack__c, vlocity_lwc27__VlocityDocuSignTemplate__c, vlocity_lwc27__VlocityErrorLogEntry__c, vlocity_lwc27__VlocityScheduledJob__c, vlocity_lwc27__VlocityTrackingEntry__c

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.

RecordAlertChangeEvent
Change Event is available for the object.

RecordAlertFeed
Feed tracking is available for the object.

RecordAlertHistory
History is available for tracked fields of the object.

RecordAlertShare
Sharing is available for the object.

RecordAlertActionableTarget

Represents the action associated with the parent record alert. 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()`, `describeLayout()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `search()`, `undelete()`, `update()`, `upsert()`

Fields

Field	Details
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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` isn't null, the user accessed this record or list view indirectly.
`Name`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** The name of the record alert actionable target.
`RecordAlertId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The parent record alert associated with the record alert actionable target. This field is a relationship field. **Relationship Name** RecordAlert **Relationship Type** Master-detail

Field	Details
	Refers To RecordAlert (the master object)
`TargetObjectName`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The name of the target object that's used to create a record on the parent record alert. Applicable when users specify create in the type field.
`TargetRecordIdentifier`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The ID of the target record that a user is navigated to. Applicable when users specify view in the type field.
`Type`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** Specifies the type of the record alert actionable target, such as create or view. Possible values are: • `Create` • `View`

RecordAlertCategory

Represents a category to group and present record alerts. 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.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The description of the RecordAlertCategory.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: Only users with View DeveloperName OR View Setup and Configuration permission can view, group, sort, and filter this field.
`Language`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The language of the RecordAlertCategory.
`MasterLabel`	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** The user-interface name of the RecordAlertCategory.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description The namespace prefix of the RecordAlertCategory.
`Severity`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Indicates the degree of impact that an alert in this category can have. Possible Education Cloud values are: • `High` • `Low` • `Medium` Possible Financial Service Cloud values are: • `Error` • `Info` • `Minor` • `Warning`

RecordAlertCategoryLocalization

Represents the translated label of a RecordAlertCategory metadata type. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

- Your organization must be using Enterprise, Performance, Unlimited, or Developer edition.
- Translation Workbench and data translation must be enabled in your org.
- To view this object, you must have the "View Setup and Configuration" permission.

Fields

Field	Details
`Language`	**Type** picklist

Field	Details
	Properties Create, Filter, Group, Restricted picklist, Sort **Description** The language the RecordAlertCategory label is translated to.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix of the RecordAlertCategory.
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the RecordAlertCategory. This field is a relationship field. **Relationship Name** Parent **Relationship Type** Lookup **Refers To** RecordAlertCategory
`Value`	**Type** textarea **Properties** Create, Filter, Sort, Update **Description** The translated label of the RecordAlertCategory.

RecordAlertDataSource

Represents an internal or external source for record alert data. This object is available in API version 54.0 and later.

Supported Calls

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

Fields

Field	Details
`ApexClassId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** An Apex class to be used as the data source. This field is a relationship field. **Relationship Name** ApexClass **Relationship Type** Lookup **Refers To** ApexClass
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** A unique name of a record alert data source.
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the record alert data source is active. The default value is `false`.
`Language`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The language of the record alert data source. Possible values are: • `da`—Danish • `de`—German

Field	Details
	• 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, idLookup, Sort **Description** A unique name of a record alert data source.
NamespacePrefix	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** A namespace prefix associated with this object.
Type	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Specifies the type of active data source that's used to retrieve a record alert. Possible values are: • APEX • BusinessRulesEngine—Business Rules Engine

RecordAlertDataTranslation

Represents the translated values of the data stored within a RecordAlert record's fields. This object is available in API version 54.0 and later.

Supported Calls

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

Special Access Rules

- Your organization must be using Enterprise, Performance, Unlimited, or Developer edition.
- Translation Workbench and data translation must be enabled in your org.
- To view this object, you must have the "View Setup and Configuration" permission.

Fields

Field	Details
`Description`	**Type** textarea **Properties** Create, Filter, Nillable, Sort, Update **Description** The translated value for the RecordAlert description.
`IsOutOfDate`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the translation is out-of-date (`true`) or current (`false`). A translation is out-of-date if the parent RecordAlert record is updated after the last translation was filed.
`Language`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort **Description** The language for these translated values.
`Name`	**Type** string

Field	Details
	Properties Create, Filter, Group, idLookup, Sort, Update **Description** The translated value for the RecordAlert record name. This field is required to translate the text in other fields.
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The ID of the RecordAlert associated with the data being translated.

Usage

Use this object to translate the data stored in a RecordAlert record into the different languages supported by Salesforce. If data translation is enabled for custom fields on the RecordAlert object, additional RecordAlertDataTranslation fields exist for translating the data contained within those fields.

RecordAlertTemplate

A template that is shown in the Alerts FlexCard when the expression set requirements are met. This object is available in API version 55.0 and later.

Supported Calls

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

Fields

Field	Details
`Description`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A detailed description of the record's rule template.
`DeveloperName`	**Type** string

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** A unique name of a record alert template.
`Language`	**Type** picklist **Properties** Create, Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort, Update **Description** The language of the record alert template. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`MasterLabel`	**Type** string **Properties** Create, Filter, Group, idLookup, Sort, Update **Description** A unique name of a record alert template.
`NamespacePrefix`	**Type** string

Field	Details
	Properties Filter, Group, Nillable, Sort **Description** A namespace prefix associated with this object.
`RecordAlertCategoryId`	**Type** reference **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** The category for the alert. This field is a relationship field. **Relationship Name** RecordAlertCategory **Relationship Type** Lookup **Refers To** RecordAlertCategory
`Subject`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** A short description of the record's rule template.

Apex Reference

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

For Apex-related SOAP API calls, see Apex-Related Calls in the *SOAP API Developer Guide*. For Apex-related objects, see Standard Objects in the *Salesforce Object Reference*.

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

`ConnectApi` Namespace

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

For information about working with the `ConnectApi` classes, see Connect in Apex.

RecordAlert Methods
These are `RecordAlert` methods.

Input Classes
These are Record Alerts Apex input classes.

Output Classes
These are Record Alerts Apex output classes.

ConnectApi Enums
Enums specific to the `ConnectApi` namespace and Industries features.

RecordAlert Methods

These are `RecordAlert` methods.

getRecordAlerts(parentId, whatId)
Retrieve a list of active record alerts.

performRecordAlertAction(alertId, actionParameters)
Snooze internal record alerts for a specified time period or dismiss them.

performActionOnExternalAlerts(sourceSystemId, actionParameters)
Snooze external record alerts that are from an external source system for a specified time period or dismiss them.

`getRecordAlerts(parentId, whatId)`

Retrieve a list of active record alerts.

API Version

54.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertCollectionRepresentation getRecordAlerts(String
parentId, String whatId)
```

Parameters

parentId
Type: String

The related parent record ID on which a record alert is created.

whatId
Type: String

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

Return Value

Type: `ConnectApi.RecordAlertCollection`

Example

To fetch alerts that have *parentId*

```
ConnectApi.RecordAlertCollectionRepresentation recordAlerts =
ConnectApi.RecordAlert.getRecordAlerts('<parentId>', null);
```

To fetch alerts that have *whatId*

```
ConnectApi.RecordAlertCollectionRepresentation recordAlerts =
ConnectApi.RecordAlert.getRecordAlerts(null, '<whatId>');
```

To fetch alerts that have *parentId* and *whatId*

```
ConnectApi.RecordAlertCollectionRepresentation recordAlerts =
ConnectApi.RecordAlert.getRecordAlerts('<parentId>', '<whatId>');
```

performRecordAlertAction(alertId, actionParameters)

Snooze internal record alerts for a specified time period or dismiss them.

API Version

53.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertRepresentation performRecordAlertAction(String
alertId, ConnectApi.RecordAlertActionInputRepresentation actionParameters)
```

Parameters

alertId

Type: String

The record alert ID on which you want to perform an action.

actionParameters

Type: `ConnectApi.RecordAlertActionInput`

The parameter specified for the record alert action.

Return Value

Type: `ConnectApi.RecordAlert`

`performActionOnExternalAlerts(sourceSystemId, actionParameters)`

Snooze external record alerts that are from an external source system for a specified time period or dismiss them.

API Version

54.0

Requires Chatter

No

Signature

```
public static ConnectApi.RecordAlertRepresentation performActionOnExternalAlerts(String
sourceSystemId, ConnectApi.RecordAlertActionInputRepresentation actionParameters)
```

Parameters

`sourceSystemId`
Type: String

The ID of the system from which the record was sourced.

`actionParameters`
Type: `ConnectApi.RecordAlertActionInput`

The parameter specified for the record alert action.

Return Value

Type: `ConnectApi.RecordAlert`

Input Classes

These are Record Alerts Apex input classes.

ConnectApi.RecordAlertActionInput
Representation of the record alert action.

ConnectApi.RecordAlertActionParameterInput
Representation of the record alert action parameters.

ConnectApi.RecordAlertActionInput

Representation of the record alert action.

Property	Type	Description	Required or Optional	Available Version
`actionName`	String	The action to perform on a record alert. Possible values are: • `Dismiss`—The record alert notification doesn't appear again. • `Snooze`—The record alert notification reappears after the specified time period.	Required	54.0
`actionParameters`	List<ConnectApi.RecordAlertActionParameterInput>	The parameter specified for the record alert action.	Optional	54.0

ConnectApi.RecordAlertActionParameterInput

Representation of the record alert action parameters.

Property	Type	Description	Required or Optional	Available Version
`name`	String	The parameter name. Note: You can specify `effectiveDate` when the action type is snooze.	Optional	54.0
`value`	String	The parameter value.	Optional	54.0

Output Classes

These are Record Alerts Apex output classes.

ConnectApi.RecordAlertCollection
Representation of a collection of record alerts.

ConnectApi.RecordAlert
Representation of the details of a record alert.

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

ConnectApi.RecordAlertActionInfo
Representation of the information of the record alert action.

ConnectApi.RecordAlertCollection

Representation of a collection of record alerts.

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

ConnectApi.RecordAlert

Representation of the details of a record alert.

Property Name	Type	Description	Available Version
actions	ConnectApi.RecordAlertActionInfoCollection	Represents the details of an action taken on a record alert.	54.0
active	Boolean	Indicates whether a record alert is active (true) or not (false).	54.0
description	String	The description of a record alert.	54.0
effectiveDate	Datetime	The start date and time from when an active record alert is in effect.	54.0
id	String	The record alert ID.	54.0
parentId	String	The parent ID of a record alert.	54.0
recordAlertCategoryName	String	The category name of a record alert.	54.0
severity	ConnectApi.RecordAlertSeverityType	Indicates the degree of impact of a record alert. Possible values are: • Error • Info • Warning	54.0
source	ConnectApi.RecordAlertSourceTypeEnum	Identifies the source system that generated the record alert. Possible values are: • Apex • Internal	54.0
sourceSystemId	String	The ID of the source system that this record alert was sourced from.	54.0
subject	String	The subject line of a record alert.	54.0
validUntilDate	Datetime	The date and time from when a record alert is no longer valid.	54.0
whatId	String	The Salesforce object record ID on which a record alert is created.	54.0

ConnectApi.RecordAlertActionInfoCollection

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

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

ConnectApi.RecordAlertActionInfo

Representation of the information of the record alert action.

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

ConnectApi Enums

Enums specific to the ConnectApi namespace and Industries features.

ConnectApi enums inherit all properties and methods of Apex enums.

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

Enum	Description
ConnectApi.EthocaAlertOutcome	Type of Ethoca alert outcome. • AccountSuspended • InProgress • NotFound • NotProvided • Other • PartiallyStopped • PreviouslyCancelled • PreviouslyRefunded • Resolved • ShipperContacted • Stopped • TooLate • UnresolvedDispute

Enum	Description
`ConnectApi.EthocaAlertRefundStatus`	Type of Ethoca alert refund status. • `NotRefunded` • `NotSettled` • `Refunded`
`ConnectApi.EthocaEventType`	Type of Ethoca event. • `AlertOutcomeUpdated` • `BatchProcessed`
`ConnectApi.RecordAlertSourceTypeEnum`	Type of source system. • `Apex` • `Internal`
`ConnectApi.RecordAlertSeverityType`	Type of severity. • `Error` • `Info` • `Warning`

Record Alerts APIs

Use the Record Alerts Business APIs to give users a seamless API experience for Record Alerts.

The Record Alerts API allows you to retrieve a list of active record alerts created on the Salesforce object records. As alerts generate, you can perform an action to snooze the alerts for a specified time or dismiss them.

Note: The Record Alert system doesn't support sending of SMS, email, or push based alerts to users.

Available resources are:

Resource	Description
`/recordalerts`	Retrieve a list of active record alerts.
`/recordalerts/id/${alertId}/actions`	Dismiss or snooze an internal record alert.
`/recordalerts/externalId/${sourceSystemId}/actions`	Dismiss or snooze an external record alert.
`/recordalerts/batch`	Retrieve bulk record alerts.
`/recordalerts/ids/actions`	Snooze bulk internal record alerts for a specified time period or dismiss them.
`/recordalerts/externalIds/actions`	Snooze bulk external record alerts for a specified time period or dismiss them.

REST Reference
You can access Record Alerts APIs using REST endpoints. These REST APIs follow similar conventions as Connect REST APIs.

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You can access Record Alerts 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 Record Alerts API resources.

Request Bodies
Here's a list of Record Alerts API request bodies.

Response Bodies
Here's a list of Record Alerts API response bodies.

Resources

Here's a list of Record Alerts API resources.

Record Alerts (GET)
Retrieve a list of active record alerts.

Bulk Record Alerts (GET)
Retrieve bulk record alerts. Use to fetch bulk record alerts associated with Salesforce objects and parent accounts.

Internal Record Alert Actions (POST)
Snooze internal record alerts for a specified time period or dismiss them.

Internal Record Alerts Bulk Actions (POST)
Snooze bulk internal record alerts for a specified time period or dismiss them.

External Record Alert Actions (POST)
Snooze external record alerts that are from an external source system for a specified time period or dismiss them.

External Record Alerts Bulk Actions (POST)
Snooze bulk external record alerts for a specified time period or dismiss them.

Record Alerts (GET)

Retrieve a list of active record alerts.

Resource

```
/recordalerts
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts
?whatId=a0URO000000Ccbz2AC
```

```
https://yourInstance.salesforce.com/services/data/vXX.Xrecordalerts
?parentId=001RO000002JPkrYAG
```

```
https://yourInstance.salesforce.com/services/data/vXX.Xrecordalerts
?whatId=a0URO000000Ccbz2AC&parentId=001RO000002JPkrYAG
```

Available version

54.0

Requires Chatter

No

HTTP methods

GET

Query parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`parentId`	String	The related parent record ID on which a record alert is created.	Optional	54.0
`whatId`	String	The Salesforce object record ID on which a record alert is created. Note: For external alerts, `whatId` can be any valid Salesforce ID. For internal alerts, `whatId` can only be polymorphic objects including all custom objects. Supported polymorphic objects are: • `Account` • `Asset` • `BusinessMilestone` • `Campaign` • `Contract` • `Contact` • `Case` • `Claim` • `InsurancePolicy` • `InsurancePolicyCoverage` • `InteractionSummary` • `Lead`	Required	54.0

Parameter Name	Type	Description	Required or Optional	Available Version
		• LoanApplication • LoanApplicantEmployment • LoanApplicantIncome • LoanApplicationProperty • LoanApplicationFinancial • LoanApplicationAsset • LoanApplicationLiability • Opportunity • PersonLifeEvent • ResidentialLoanApplication • All Custom Objects		

Response body for GET

Record Alert Collection

JSON example of response body

```
{
  "recordAlerts" : [ {
    "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
        "parameters" : [ "effectiveDate" ]
      } ]
    },
    "active" : true,
   "description" : "Unauthorized transaction on card ending with -XXXX on Nov. 11, 2021
 in Rome, Italy",
    "effectiveDate" : "2021-11-10T20:00:00.000Z",
    "id" : "0qZRO000000003o",
    "recordAlertCategoryName" : "Fraud",
    "severity" : "Error",
    "source" : "Internal",
    "subject" : "Fraud Transaction 3",
    "validUntilDate" : "2022-11-08T20:00:00.000Z",
    "whatId" : "a0URO000000Ccbz"
  }, {
    "actions" : {
      "actionInfoCollection" : [ {
        "actionName" : "dismiss",
        "parameters" : [ ]
      }, {
        "actionName" : "snooze",
```

```
        "parameters" : [ "effectiveDate" ]
      } ]
    },
    "description" : "Apex alert description from an external system",
    "severity" : "Test",
    "source" : "External",
    "sourceSystemId" : "sourceSystemId",
    "subject" : "Subject",
    "whatId" : "a0URO000000Ccbz2AC"
  } ]
}
```

Bulk Record Alerts (GET)

Retrieve bulk record alerts. Use to fetch bulk record alerts associated with Salesforce objects and parent accounts.

Note: You cannot use a combination of `whatIds` and `parentIds` to fetch record alerts in bulk.

Resource

```
/recordalerts/batch
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?
whatIds=03R0000026YJ8uIAG,001R0000026YJ8uIAG,00Dx00000004X2F
```

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts/batch?
parentIds=03R0000026YJ8uIAG,001R0000026YJ8uIAG,00Dx00000004X2F
```

Available version

55.0

Requires Chatter

No

HTTP methods

GET

Request parameters for GET

Parameter Name	Type	Description	Required or Optional	Available Version
`parentIds`	String	The IDs of the related parent records on which record alerts are created. For the supported polymorphic objects, see RecordAlert.	Optional Note: This parameter is required when `whatIds` aren't provided.	55.0

Parameter Name	Type	Description	Required or Optional	Available Version
`whatIds`	String	The Salesforce object record IDs on which record alerts are created. Note: For internal alerts, whatId can only be polymorphic objects, including all custom objects. For external alerts, whatId can be any valid Salesforce ID. For the supported polymorphic objects, see RecordAlert.	Optional Note: This parameter is required when `parentIds` aren't provided.	55.0

Response body for GET

Record Alert Collection Map

Internal Record Alert Actions (POST)

Snooze internal record alerts for a specified time period or dismiss them.

Resource

```
/recordalerts/id/${alertId}/actions
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts
/id/0qZRO000000005a2AA/actions
```

Available version

54.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

`RecordAlertActionInput`

JSON example

Dismiss a record alert:

```
{
   "actionName": "dismiss"
}
```

Snooze a record alert:

```
{
   "actionParameters": [ {
```

```
      "name": "effectiveDate",
      "value": "2021-12-11T02:16:35.477Z"
   } ],
   "actionName": "snooze"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`actionName`	String	The action to perform on a record alert. Possible values are: • `Dismiss`—The record alert notification doesn't appear again. • `Snooze`—The record alert notification reappears after the specified time period.	Required	54.0
`actionParameters`	Record Alert Action Parameter Input[]	Represents the parameter specified for the record alert action.	Optional	54.0

Response body for POST

Record Alert

Internal Record Alerts Bulk Actions (POST)

Snooze bulk internal record alerts for a specified time period or dismiss them.

Note: You cannot peform multiple actions on a single record alert ID.

Resource

```
/recordalerts/ids/actions
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts
/ids/actions
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

`RecordAlertBulkActionInputRepresentation`

JSON example

```
{
  "actions": [
    {
      "recordAlertId": "0qZRO00000000B1",
      "actionParameters": [
        {
          "name": "snoozeUntilDate",
          "value": "2022-03-08T02:16:35.477Z"
        }
      ],
      "actionName": "snooze"
    },
    {
      "recordAlertId": "0qZRO00000000B2",
      "actionParameters": [],
      "actionName": "dismiss"
    },
    {
      "recordAlertId": "0qZRO00000000B3",
      "actionParameters": [
        {
          "name": "snoozeUntilDate",
          "value": "2022-03-08T02:16:35.477Z"
        }
      ],
      "actionName": "snooze"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
actions	Record Alert Action Input[]	Representation of the record alert actions.	Required	55.0

Response body for POST

Record Alert Action Collection Map

External Record Alert Actions (POST)

Snooze external record alerts that are from an external source system for a specified time period or dismiss them.

Resource

```
/recordalerts/externalId/${sourceSystemId}/actions
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts
/externalId/254be9562893/actions
```

Available version

54.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

`RecordAlertActionInput`

JSON example

Dismiss a record alert:

```
{
   "actionName": "dismiss"
}
```

Snooze a record alert:

```
{
   "actionParameters": [ {
      "name": "effectiveDate",
      "value": "2021-12-11T02:16:35.477Z"
   } ],
   "actionName": "snooze"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`actionName`	String	The action to perform on a record alert. Possible values are: • `Dismiss`—The record alert notification doesn't appear again. • `Snooze`—The record alert notification reappears after the specified time period.	Required	54.0
`actionParameters`	Record Alert Action Parameter Input[]	Represents the parameter specified for the record alert action.	Optional	54.0

Response body for POST

Record Alert

External Record Alerts Bulk Actions (POST)

Snooze bulk external record alerts for a specified time period or dismiss them.

Note: You cannot peform multiple actions on a single record alert ID.

Resource

```
/recordalerts/externalIds/actions
```

Resource Examples

```
https://yourInstance.salesforce.com/services/data/vXX.X/recordalerts
/externalIds/actions
```

Available version

55.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

Root XML tag

`RecordAlertBulkActionInputRepresentation`

JSON example

```
{
  "actions": [
    {
      "recordAlertId": "0qZRO00000000B1",
      "actionParameters": [
        {
          "name": "snoozeUntilDate",
          "value": "2022-03-08T02:16:35.477Z"
        }
      ],
      "actionName": "snooze"
    },
    {
      "recordAlertId": "0qZRO00000000B2",
      "actionParameters": [],
      "actionName": "dismiss"
    },
    {
      "recordAlertId": "0qZRO00000000B3",
      "actionParameters": [
        {
          "name": "snoozeUntilDate",
          "value": "2022-03-08T02:16:35.477Z"
        }
      ],
      "actionName": "snooze"
    }
```

```
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
actions	Record Alert Action Input[]	Representation of the record alert actions.	Required	55.0

Response body for POST

Record Alert Action Collection Map

Request Bodies

Here's a list of Record Alerts API request bodies.

Record Alert Bulk Action Input

Input representation of the actions on bulk record alerts..

Record Alert Action Input

Input representation of the record alert action.

Record Alert Action Parameter Input

Input representation of the record alert action parameters.

Record Alert Bulk Action Input

Input representation of the actions on bulk record alerts..

Root XML tag

`RecordAlertBulkActionInputRepresentation`

JSON example

```
{
  "actions": [
    {
      "recordAlertId": "0qZRO00000000B1",
      "actionParameters": [
        {
          "name": "snoozeUntilDate",
          "value": "2022-03-08T02:16:35.477Z"
        }
      ],
      "actionName": "snooze"
    },
    {
      "recordAlertId": "0qZRO00000000B2",
      "actionParameters": [],
      "actionName": "dismiss"
    },
```

```
    {
      "recordAlertId": "0qZRO00000000B3",
      "actionParameters": [
        {
          "name": "snoozeUntilDate",
          "value": "2022-03-08T02:16:35.477Z"
        }
      ],
      "actionName": "snooze"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`actions`	Record Alert Action Input[]	Representation of the record alert actions.	Required	55.0

Record Alert Action Input

Input representation of the record alert action.

Root XML tag

`RecordAlertActionInput`

JSON example

Dismiss a record alert:

```
{
   "actionName": "dismiss"
}
```

Snooze a record alert:

```
{
   "actionParameters": [ {
      "name": "effectiveDate",
      "value": "2021-12-11T02:16:35.477Z"
   } ],
   "actionName": "snooze"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`actionName`	String	The action to perform on a record alert. Possible values are: • `Dismiss`—The record alert notification doesn't appear again.	Required	54.0

Name	Type	Description	Required or Optional	Available Version
		• `Snooze`—The record alert notification reappears after the specified time period.		
`actionParameters`	Record Alert Action Parameter Input[]	Represents the parameter specified for the record alert action.	Optional	54.0

Record Alert Action Parameter Input

Input representation of the record alert action parameters.

Root XML tag

`RecordAlertActionInput`

JSON example

```
{
   "actionParameters": [ {
      "name": "effectiveDate",
      "value": "2021-12-11T02:16:35.477Z"
   } ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`name`	String	The parameter name. Note: You can specify `effectiveDate` when the action type is snooze.	Optional	54.0
`value`	String	The parameter value.	Optional	54.0

Response Bodies

Here's a list of Record Alerts API response bodies.

Record Alert Collection Map

Output representation of the bulk record alerts request.

Record Alert Collection

Output representation of a collection of record alerts.

Record Alert

Output representation of the details of a record alert.

Record Alert Action Info Collection

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

Record Alert Action Info

Output representation of the information of the record alert action.

Record Alert Action Collection Map

Output representation of the record alert bulk actions.

Record Alert Action

Output representation of the record alert action.

Record Alert Error

Output representation of the record alert error.

Record Alert Collection Map

Output representation of the bulk record alerts request.

JSON example

```
{
  "hasErrors": true,
  "results": {
    "001RO000003KPW0YAO": {
      "recordAlertErrors": [
        {}
      ],
      "recordAlerts": [
        {
          "actions": {
            "actionInfoCollection": [
              {
                "actionName": "snooze",
                "parameters": [
                  "snoozeUntilDate"
                ]
              },
              {
                "actionName": "dismiss",
                "parameters": []
              }
            ]
          },
          "active": true,
          "description": "Alert Description",
          "effectiveDate": "2022-03-10T20:00:00.000Z",
          "id": "0qZRO000000008o",
          "severity": "Error",
          "snoozeUntilDate": "2022-03-12T19:09:06.000Z",
          "source": "Internal",
          "subject": "Alert Subject",
          "validUntilDate": "2022-03-30T19:00:00.000Z",
          "whatId": "001RO000003KPW0"
        }
      ],
```

```
      "status": "SUCCESS"
    },
    "001RO000003NJJrYAO": {
      "recordAlertErrors": [
        {
          "errorCode": "Apex_Execution_Error",
          "errorMessage": "Insufficient access to record"
        }
      ],
      "recordAlerts": [
        {
          "actions": {
            "actionInfoCollection": [
              {
                "actionName": "snooze",
                "parameters": [
                  "snoozeUntilDate"
                ]
              },
              {
                "actionName": "dismiss",
                "parameters": []
              }
            ]
          },
          "active": true,
          "description": "Alert Description",
          "effectiveDate": "2022-03-08T20:00:00.000Z",
          "id": "0qZRO00000000BO",
          "severity": "Info",
          "snoozeUntilDate": "2022-03-21T15:26:45.000Z",
          "source": "Internal",
          "subject": "Alert Subject",
          "validUntilDate": "2022-03-31T19:00:00.000Z",
          "whatId": "001RO000003NJJr"
        }
      ]
    },
    "status": "PARTIAL_SUCCESS"
  }
}
```


Property Name	Type	Description	Filter Group and Version	Available Version
`hasErrors`	Boolean	Indicates whether at least one of the results in the result set contains an error (`true`) or not (`false`).	Small, 55.0	55.0
`results`	Map<String, Record Alert Collection>	Represents the collection of record alerts.	Small, 55.0	55.0

Record Alert Collection

Output representation of a collection of record alerts.

Property Name	Type	Description	Filter Group and Version	Available Version
`recordAlerts`	Record Alert[]	Represents the details of a record alert.	Small, 54.0	54.0

Record Alert

Output representation of the details of a record alert.

Property Name	Type	Description	Filter Group and Version	Available Version
`actions`	Record Alert Action Info Collection	Represents the details of an action taken on a record alert.	Small, 54.0	54.0
`active`	Boolean	Indicates whether a record alert is active (`true`) or not (`false`).	Small, 54.0	54.0
`description`	String	The description of a record alert.	Small, 54.0	54.0
`effectiveDate`	String	The start date and time from when an active record alert is in effect.	Small, 54.0	54.0
`id`	String	The record alert ID.	Small, 54.0	54.0
`parentId`	String	The parent ID of a record alert.	Small, 54.0	54.0
~~`recordAlertCategoryName`~~	String	The category name of a record alert.	Small, 54.0	54.0
`severity`	String	Indicates the degree of impact of a record alert. Possible values are: • `Error` • `Info` • `Warning`	Small, 54.0	54.0
`source`	String	Identifies the source system that generated the record alert. Possible values are: • `External` • `Internal`	Small, 54.0	54.0
`sourceSystemId`	String	The ID of the source system that this record alert was sourced from.	Small, 54.0	54.0
`subject`	String	The subject line of a record alert.	Small, 54.0	54.0

Property Name	Type	Description	Filter Group and Version	Available Version
validUntilDate	String	The date and time from when a record alert is no longer valid.	Small, 54.0	54.0
whatId	String	The Salesforce object record ID on which a record alert is created.	Small, 54.0	54.0

Record Alert Action Info Collection

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

Property Name	Type	Description	Filter Group and Version	Available Version
actionInfoCollection	Record Alert Action Info[]	Represents the action details of a record alert.	Small, 54.0	54.0

Record Alert Action Info

Output representation of the information of the record alert action.

Property Name	Type	Description	Filter Group and Version	Available Version
actionName	String	The name of the action performed on a record alert. Possible values are: • Dismiss • Snooze	Small, 54.0	54.0
parameters	String[]	List of parameters specified for the record alert action.	Small, 54.0	54.0

Record Alert Action Collection Map

Output representation of the record alert bulk actions.

JSON example

```
{
  "hasErrors": true,
  "results": {
    "0qZRO00000000B1": {
      "status": "SUCCESS",
      "recordAlertErrors": [],
      "recordAlert": {
        "actions": {
          "actionInfoCollection": [
```

```
            {
              "actionName": "snooze",
              "parameters": [
                "snoozeUntilDate"
              ]
            },
            {
              "actionName": "dismiss",
              "parameters": []
            }
          ]
        },
        "active": true,
        "description": "Alert Description",
        "effectiveDate": "2022-03-08T20:00:00.000Z",
        "id": "0qZRO00000000BO",
        "severity": "Info",
        "snoozeUntilDate": "2022-03-21T15:26:45.000Z",
        "source": "Internal",
        "subject": "Alert Subject",
        "validUntilDate": "2022-03-31T19:00:00.000Z",
        "whatId": "001RO000003NJJr"
      }
    },
    "0qZRO00000000B2": {
      "recordAlertErrors": [
        {
          "errorCode": "Internal_Error",
          "errorMessage": "Insufficient access to record"
        }
      ],
      "status": "Failure"
    },
    "0qZRO00000000B3": {
      "recordAlertErrors": [
        {
          "errorCode": "Internal_Error",
          "errorMessage": "Insufficient access to record"
        }
      ],
      "status": "Failure"
    }
  }
}
```


Property Name	Type	Description	Filter Group and Version	Available Version
`hasErrors`	Boolean	Indicates whether at least one of the results in the result set contains an error (`true`) or not (`false`).	Small, 55.0	55.0
`results`	Map<String, Record Alert Action>	Representation of the record alert action.	Small, 55.0	55.0

Record Alert Action

Output representation of the record alert action.

Property Name	Type	Description	Filter Group and Version	Available Version
`recordAlert`	Record Alert	Record alert on which an action is performed.	Small, 53.0	53.0
`recordAlertErrors`	Record Alert Error[]	Lists any errors returned by the record alert action request.	Small, 55.0	55.0
`status`	String	Specifies the status of the request.	Small, 55.0	55.0

Record Alert Error

Output representation of the record alert error.

Property Name	Type	Description	Filter Group and Version	Available Version
`errorCode`	String	Error code associated with the failed record.	Small, 55.0	55.0
`errorMessage`	String	Details explaining why the request failed.	Small, 55.0	55.0

Record Alerts 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**.

RecordAlertCategory
Represents a category to group and present record alerts.

RecordAlertDataSource
Represents an internal or external source for record alert data.

RecordAlertCategory

Represents a category to group and present record alerts.

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

RecordAlertCategory components have the suffix `recordAlertCategory` and are stored in the `recordAlertCategories` folder.

Version

RecordAlertCategory components are available in API version 54.0 and later.

Fields

Field Name	Description
`description`	**Field Type** string **Description** The description of the record alert category.
`masterLabel`	**Field Type** string **Description** Required. The user-interface name of the record alert category.
`severity`	**Field Type** string **Description** Indicates the degree of impact that an alert in this category can have. Possible Education Cloud values are: • `High` • `Low` • `Medium` Possible Financial Service Cloud values are: • `Error` • `Info` • `Minor` • `Warning`

Declarative Metadata Sample Definition

The following is an example of a RecordAlertCategory component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RecordAlertCategory xmlns="http://soap.sforce.com/2006/04/metadata">
    <description>Tracks Financial Account Fraud Alerts</description>
    <masterLabel>Fraud</masterLabel>
    <severity>Error</severity>
</RecordAlertCategory>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>Fraud</members>
        <name>RecordAlertCategory</name>
    </types>
    <version>54.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

RecordAlertDataSource

Represents an internal or external source for record alert data.

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

RecordAlertDataSource components have the suffix `recordAlertDataSource` and are stored in the `recordAlertDataSources` folder.

Version

RecordAlertDataSource components are available in API version 54.0 and later.

Fields

Field Name	Description
`apexClass`	**Field Type** string **Description** The Apex class to be used as the data source. Note: This class must implement the `fscwmgen.RecordAlertProvider` interface.
`isActive`	**Field Type** boolean **Description** Indicates whether this data source is still active (`true`) or not (`false`). Note: There can only be one active data source at a time. The default is `false`.
`isProtected`	**Field Type** boolean **Description** An auto-generated value that doesn't currently impact the behavior of the metadata type.
`masterLabel`	**Field Type** string **Description** Required. The user-interface name of the record alert category.
`type`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The type of active data source used to fetch a record alert. This field is available in API version 55.0 and later. Possible values are: • `APEX` • `BusinessRulesEngine`

Declarative Metadata Sample Definition

The following is an example of a RecordAlertDataSource component.

```
<?xml version="1.0" encoding="UTF-8"?>
<RecordAlertDataSource xmlns="http://soap.sforce.com/2006/04/metadata">
    <masterLabel>FeeInfo</masterLabel>
    <apexClass>SalesforceProvider</apexClass>
    <isActive>false</isActive>
</RecordAlertDataSource>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <namespacePrefix>[namespacePrefix]</namespacePrefix>
    <types>
        <members>SalesforceProvider</members>
        <name>ApexClass</name>
    </types>
    <types>
        <members>*</members>
        <name>RecordAlertDataSource</name>
    </types>
    <version>54.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Record Alerts 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**.

RecordAlertCategory

Represents a category to group and present record alerts. This object is available in API version 54.0 and later.

RecordAlertDataSource

Represents an internal or external source for record alert data. This object is available in API version 54.0 and later.

RecordAlertCategory

Represents a category to group and present record alerts. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

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

Field	Details
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Language of the record alert category. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French • `it`—Italian • `ja`—Japanese • `ko`—Korean • `nl_NL`—Dutch • `no`—Norwegian • `pt_BR`—Portuguese (Brazil) • `ru`—Russian • `sv`—Swedish • `th`—Thai • `zh_CN`—Chinese (Simplified) • `zh_TW`—Chinese (Traditional)
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed

Field	Details
	• `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, idLookup, Nillable, Sort **Description** Label of the record alert category.
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Record alert category metadata.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.
`Severity`	**Type** picklist **Properties** Filter, Group, Nillable, Sort **Description** Indicates the degree of impact that an alert in this category can have. Possible values are: • `Error` • `Info` • `Warning`

RecordAlertDataSource

Represents an internal or external source for record alert data. 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.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`ApexClass`	**Field Type** string **Description** The Apex class to be used as the data source. Note: This class must implement the `fscwmgen.RecordAlertProvider` interface.
`ApexClassId`	**Type** reference **Properties** Filter, Group, Nillable, Sort **Description** The ID of the Apex class to be used as the data source. Note: This class must implement the `fscwmgen.RecordAlertProvider` interface. This is a relationship field. **Relationship Name** ApexClass **Relationship Type** Lookup **Refers To** ApexClass
`DeveloperName`	**Type** string **Properties** Filter, Group, Nillable, Sort

Field	Details
	Description The unique name of the object in the API. This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. In managed packages, this field prevents naming conflicts on package installations. With this field, a developer can change the object's name in a managed package and the changes are reflected in a subscriber's organization. Note: When creating large sets of data, always specify a unique `DeveloperName` for each record. If no `DeveloperName` is specified, performance slows down while Salesforce generates one for each record.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** Full name of the associated metadata 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.
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Nillable, Sort **Description** Indicates whether the data source is still active (`true`) or not (`false`). Note: There can only be one active data source at a time. The default value is `false`.
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** Language of the record alert data source. Possible values are: • `da`—Danish • `de`—German • `en_US`—English

Field	Details
	• `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)
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package. Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** string **Properties** Filter, Group, idLookup, Nillable, Sort **Description** Label of the record alert data source.

Field	Details
`Metadata`	**Type** complexvalue **Properties** Create, Nillable, Update **Description** Record alert data source metadata.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** Namespace prefix associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix.
`Type`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The type of active data source used to fetch a record alert. This field is available in API version 55.0 and later. Possible values are: • `APEX` • `BusinessRulesEngine`

CHAPTER 24 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`	**Type** reference **Properties** Create, Filter, Group, Sort, Update **Description** The record from which data is aggregated. This field is a polymorphic relationship field. **Relationship Name** AggregateFromRecord **Relationship Type** Lookup
`AggregateToRecordId`	**Type** reference **Properties** Create, Filter, Group, Sort, Update

Field	Details
	Description The record to which data is aggregated. This field is a polymorphic relationship field. **Relationship Name** AggregateToRecord **Relationship Type** Lookup
`LastReferencedDate`	**Type** 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.
`LastViewedDate`	**Type** 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.
`Name`	**Type** string **Properties** Autonumber, Defaulted on create, Filter, idLookup, Sort **Description** The name of the record aggregation result.
`OwnerId`	**Type** reference **Properties** Create, Defaulted on create, Filter, Group, Sort, Update **Description** 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 **Description** 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.

RecordAggregationResultOwnerSharingRule
Sharing rules are available for the object.

RecordAggregationResultShare
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
/connect/record-aggregation/recordAggregationDefinitionId/record-rollup-results on page 1779 (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 1778 (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

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/record-aggregation/dpe-generation
```

Available version

59.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
   "definitionId": "ALL"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`definitionId`	String	ID of a record aggregation definition component. To generate a Data Processing Engine definition for all the active record aggregation definition components, specify `ALL`.	Required	59.0

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

```
/connect/record-aggregation/recordAggregationDefinitionId/record-rollup-results
```

The `recordAggregationDefinitionId` parameter is the ID of the record aggregation definition.

Resource example

```
https://yourInstance.salesforce.com/services/data/v63.0/connect/record-aggregation/16y0000001/record-rollup-results?anchorRecordId=10s0000001
```

Available version

61.0

HTTP methods

POST

Query parameters for POST

Parameter Name	Type	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	Type	Description	Required or Optional	Available Version
`isSortOrderAscending`	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	Type	Description	Required or Optional	Available Version
`definitionId`	String	ID of a record aggregation definition component. To generate a Data Processing Engine definition for all the active record aggregation definition components, specify `ALL`.	Required	59.0

Record Rollup Result Input

Input representation to sort and fetch the record rollup results.

JSON example

```
{
  "sortBy": "Name",
  "isSortOrderAscending": true
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`isSortOrderAscending`	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	Type	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

```
"columns": [
  {
    "fieldApiName": "Name",
    "displayFormatType": "text",
    "fieldLabel": "Name",
    "sequence": 0,
    "isRedirectionEnabled": true,
    "isSortable": true,
    "isTypeName": true,
    "sortByField": "Name"
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
`displayFormatType`	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
`isRedirectionEnabled`	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.

JSON Example

```
{
  "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": "0c7xx000000006TAAQ",
        "FinancialAccountNumber": "*********0001",
        "Name": "John Doe",
        "Case__c": {
          "Id": "Some ID",
          "CaseNumber": "000001"
        }
      }
    }
  ],
  "statusCode": "200",
  "totalResultCount": 1,
  "definitionDisplayName": "Savings Financial Account"
}
```

Property Name	Type	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	Type	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
`totalResultCount`	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

```
"rows": [
  {
    "rowData": {
      "Status": "Active",
      "Type": "Savings",
      "Id": "0c7xx000000006TAAQ",
      "FinancialAccountNumber": "*********0001",
      "Name": "John Doe",
      "Case__c": {
        "Id": "Some ID",
        "CaseNumber": "000001"
      }
    }
  }
]
```

Property Name	Type	Description	Filter Group and Version	Available Version
`rowData`	Map<String, Object>	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`	**Field Type** RecordAggregationDefinitionAggregationType (enumeration of type string) **Description** Required. Type of the data aggregation. Valid value is: • `Record`
`batchProcessingDefinition`	**Field Type** string **Description** Data Processing Engine definition that aggregates data from one record to another.
`description`	**Field Type** string **Description** 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[] **Description** 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.

Field Name	Description
associatedObject	**Field Type** string **Description** Required. API name of the object associated with this record aggregation object.
developerName	**Field Type** string **Description** Developer name of the record aggregation object. May 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.
filterLogic	**Field Type** string **Description** 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.
masterLabel	**Field Type** string **Description** Required. A user-friendly name for RecordAggregationDefinition, which is defined when the RecordAggregationDefinition is created.
recordAggregationJoinCondition	**Field Type** RecordAggregationJoinCondition[] **Description** List of join conditions that apply to this record aggregation object.
recordAggregationObjectFilter	**Field Type** RecordAggregationObjectFilter[] **Description** List of filters that are applied to the records of this record aggregation object.

Field Name	Description
	Available in API version 60.0 and later.

RecordAggregationJoinCondition

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 **Description** 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 **Description** 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`	**Field Type** RecordAggregationJoinConditionType (enumeration of type string) **Description** 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`

RecordAggregationObjectFilter

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`	**Field Type** RecordAggregationObjectFilterOperator (enumeration of type string) **Description** Required. Operator used in the filter expression. Values are: • `Contains` • `Equals` • `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</value>
          <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</operator>
          <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</operator>
          <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.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>RecordAggregationDefinition</name>
    </types>
    <version>60.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

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`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Required. API name of the object from which data is aggregated.

Field	Details
`AggregateToObject`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Required. API name of the object to which data is aggregated.
`AggregationType`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** Required. Type of the data aggregation. Possible value is: • `Record`
`BatchProcessingDefinitionId`	**Type** reference **Properties** 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`	**Type** textarea **Properties** Filter, Group, Nillable, Sort **Description** The description for this record aggregation definition.

Field	Details
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** 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 **Record Type Name**. This field is automatically generated, but you can supply your own value if you create the record using the API.
`DisplayName`	**Type** string **Properties** Filter, Group, idLookup, Sort **Description** Required. The name of the record aggregation definition that's displayed in the record page.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description** 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`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language of the record aggregation definition. Possible values are: • `da`—Danish

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 **Properties** 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`.

RecordAggregationJoinCondition

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.

Fields

Field	Details
`JoinField`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** 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 **Description** 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`	**Type** reference

Field	Details
	Properties Create, Filter, Group, Sort **Description** 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`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** 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 **Description** The second record aggregation object in the join condition. This field is a relationship field. **Relationship Name** RelatedRecordAggrObject **Relationship Type** Lookup **Refers To** RecordAggregationObject
`Type`	**Type** picklist **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.

Field	Details
	Possible values are: • `AggregateFrom` • `AggregateTo` • `Intermediate`

RecordAggregationObject

Represents an object in the record aggegation join sequence. 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
`AssociatedObject`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort, Update **Description** The API name of the object associated with this record aggregation object.
`DeveloperName`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** 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.

Field	Details
`FilterLogic`	**Type** string **Properties** Create, Filter, Group, Nillable, Sort, Update **Description** 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`	**Type** 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 • `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

Field	Details
	Properties Create, Filter, Group, Sort, Update **Description** Label for the record aggregation object.
RecordAggregationDefinitionId	**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** RecordAggregationDefinition **Relationship Type** Lookup **Refers To** RecordAggregationDefinition

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.

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
AssociatedObjectField	**Type** 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`	**Type** 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`	**Type** reference **Properties** 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 **Description** Sequence number of this record aggregation object filter.
`Value`	**Type** string **Properties** Create, Filter, Group, Sort, Update **Description** Reference value with which the designated field's values are compared when the filter is applied on the associated object's records.

CHAPTER 25 Service Process Studio

In this chapter ...

- Service Process Studio Metadata Types
- Apex Reference
- Service Process Studio Invocable Actions
- Service Process Studio Connect APIs
- Service Process Studio Connect API Use Cases

Build enhanced customer service experiences through real-time integration with core banking functions and transactional data.

Service Process Studio Metadata Types

Use the Service Process Studio metadata types to set up your Service Process use case. Define attributes, OmniScripts, flows, classes, and the Integration Definition.

IntegrationProviderDef
Represents an integration definition associated with a service process. Stores data for the Industries: Send Apex Async Request and Industries: Send External Async Request invocable actions.

ServiceProcess
Represents a process created in Service Process Studio and its associated attributes.

EDITIONS

Available in: Lightning Experience

Available when the admin settings for Service Process Studio are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

IntegrationProviderDef

Represents an integration definition associated with a service process. Stores data for the Industries: Send Apex Async Request and Industries: Send External Async Request invocable actions.

Parent Type

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

File Suffix and Directory Location

IntegrationProviderDef components have the suffix `.integrationProviderDefinition` and are stored in the `.integrationProviderDefinition` folder.

Version

IntegrationProviderDef components are available in API version 57.0 and later.

Special Access Rules

Access to the IntegrationProviderDef type requires the AccessToServiceProcess permission.

Fields

Field Name	Description
`active`	**Field Type** boolean **Description** Specifies whether this Integration Definition is active. The default is `false`.
`apexClass`	**Field Type** string

Field Name	Description
	Description The custom Apex class that the related Industries: Send Apex Async Request invocable action invokes. Specify either apexClass or fileBasedApexClass but not both. Applies only if the type is `Apex`.
`description`	**Field Type** string **Description** A meaningful explanation of the Integration Definition.
`developerName`	**Field Type** string **Description** Required. A system name for the Integration Definition.
`externalServiceOperationName`	**Field Type** string **Description** The external service operation that the related Industries: Send External Async Request invocable action invokes. Applies only if the type is `LowCode`.
`externalServiceRegistration`	**Field Type** string **Description** The external service that the related Industries: Send External Async Request invocable action invokes. Applies only if the type is `LowCode`.
`fileBasedApexClass`	**Field Type** string **Description** The Salesforce-provided Apex class that the related Industries: Send Apex Async Request invocable action invokes. Specify either apexClass or fileBasedApexClass but not both. Applies only if the type is `Apex`.
`inputDataProcessor`	**Field Type** string **Description** The optional Integration Procedure that processes the sent data. Applies only if the type is `LowCode`.

Field Name	Description
`integrationProviderAttributes`	**Field Type** IntegrationProviderAttr[] **Description** Custom attributes that store data associated with an Integration Definition.
`outputDataProcessor`	**Field Type** string **Description** The optional Integration Procedure that processes the returned data. Applies only if the type is `LowCode`.
`providerLabel`	**Field Type** string **Description** Required. A meaningful name for the Integration Definition.
`type`	**Field Type** DefinitionType (enumeration of type string) **Description** Required. What the Integration Definition calls, either an Apex class or an external service. Values are: • `Apex` • `LowCode`

IntegrationProviderAttr

A custom attribute that stores data associated with an Integration Definition.

Field Name	Description
`dataType`	**Field Type** AttrDataType (enumeration of type string) **Description** Required. The data type of the attribute. Values are: • `Date`

Field Name	Description
	• `DateTime` • `Double` • `Integer` • `Percentage` • `String` • `Boolean`
`dateTimeValue`	**Field Type** dateTime **Description** The value of the attribute if the `dataType` is `DateTime`.
`dateValue`	**Field Type** date **Description** The value of the attribute if the `dataType` is `Date`.
`description`	**Field Type** string **Description** A meaningful explanation of the attribute.
`developerName`	**Field Type** string **Description** Required. A system name for the attribute.
`doubleValue`	**Field Type** double **Description** The value of the attribute if the `dataType` is `Double`.
`integerValue`	**Field Type** int **Description** The value of the attribute if the `dataType` is `Integer`.
`label`	**Field Type** string

Field Name	Description
	Description Required. A meaningful name for the attribute.
`percentageValue`	**Field Type** double **Description** The value of the attribute if the `dataType` is `Percentage`.
`required`	**Field Type** boolean **Description** Required. Specifies whether the attribute is required.
`stringValue`	**Field Type** string **Description** The value of the attribute if the `dataType` is `String`.
`trueOrFalseValue`	**Field Type** boolean **Description** The value of the attribute if the `dataType` is `Boolean`.

Declarative Metadata Sample Definition

The following is an example of an IntegrationProviderDef component.

```
<?xml version="1.0" encoding="UTF-8"?>
<IntegrationProviderDef xmlns="http://soap.sforce.com/2006/04/metadata">
   <developerName>EmailUpdate</developerName>
   <providerLabel>EmailUpdate</providerLabel>
   <type>Apex</type>
   <apexClass>SendEmailUpdate</apexClass>
   <integrationProviderAttributes>
      <developerName>EmailAddress</developerName>
      <label>EmailAddress</label>
      <dataType>String</dataType>
      <stringValue>person@example.com</stringValue>
      <required>true</required>
   </integrationProviderAttributes>
</IntegrationProviderDef>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>IntegrationProviderDef</name>
    </types>
    <version>57.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

ServiceProcess

Represents a process created in Service Process Studio and its associated attributes.

Parent Type

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

File Suffix and Directory Location

ServiceProcess components have the suffix `.serviceprocess` and are stored in the `.serviceprocess` folder.

Version

ServiceProcess components are available in API version 57.0 and later.

Special Access Rules

Access to the ServiceProcess type requires the AccessToServiceProcess permission.

Fields

Field Name	Description
`description`	**Field Type** string **Description** A meaningful explanation of the service process.
`processLabel`	**Field Type** string

Field Name	Description
	Description Required. A meaningful name for the service process.
`serviceProcessAttributes`	**Field Type** ServiceProcessAttribute[] **Description** Custom attributes that store the data associated with the service process.
`serviceProcessDependencies`	**Field Type** ServiceProcessDependency[] **Description** Dependent components of the service process, such as OmniScripts or flows.
`serviceProcessItemGroups`	**Field Type** ServiceProcessItemGroup[] **Description** Groups of related ServiceProcessAttribute records.
`shortDescription`	**Field Type** string **Description** A brief meaningful explanation of the service process.
`usageType`	**Field Type** SvcCatalogItemUsageType (enumeration of type string) **Description** Required. The Cloud that uses this service process. Values are: • `CustomerService` • `Employee` • `FinancialServices` • `Industry (available in version 58.0 and later)`

ServiceProcessAttribute

A custom attribute that stores data associated with a service process. For example, a service process that reverses a fee can have a Fee Type attribute.

Field Name	Description
`attributeType`	**Field Type** SvcCtlgItemAttrAttributeType (enumeration of type string) **Description** A `Base` attribute corresponds to a SvcCatalogRequest field, which is subject to field-level security. An `Extended` attribute is only a ServiceProcessAttribute object record, which isn't subject to field-level security. Values are: • `Base` • `Extended` The default is `Extended`.
`dataType`	**Field Type** SvcCatalogItemAttrDataType (enumeration of type string) **Description** The data type of the attribute. Values are: • `Checkbox` • `Currency` • `Date` • `Datetime` • `Integer` • `ListOfBoolean` • `ListOfDouble` • `ListOfInteger` • `ListOfMaps` • `ListOfString` • `Map` • `Number` • `Percentage` • `Text` The default is `Text`. Note: Selecting `Currency` doesn't cause an error, but currency conversions aren't supported.
`description`	**Field Type** string **Description** A meaningful explanation of the attribute.

Field Name	Description
developerName	**Field Type** string **Description** Required. A system name for the attribute.
fieldIdentifier	**Field Type** string **Description** For a `Base` attribute, the Developer Name of the SvcCatalogRequest field. This field can be standard or custom.
groupApiName	**Field Type** string **Description** The `apiName` of the ServiceProcessItemGroup to which this attribute belongs.
inputVariableValue	**Field Type** string **Description** The default value of the attribute.
isRequired	**Field Type** boolean **Description** Specifies whether the attribute is required. The default is `false`.
label	**Field Type** string **Description** Required. A meaningful name for the attribute.
parentAttribute	**Field Type** string **Description** The parent attribute of this attribute. For example, a Latitude attribute can have GeoLocation as a parent.
sortOrder	**Field Type** int

Field Name	Description
	Description The position of the attribute in the payload relative to other attributes having no parent or the same parent.

ServiceProcessDependency

A dependent component of the service process, which can be a flow, an OmniScript, an Integration Definition, or a preprocessor Apex class.

Field Name	Description
`dependencyReference`	**Field Type** string **Description** Required. The Developer Name of the flow, OmniScript, Integration Definition, or preprocessor Apex class.
`type`	**Field Type** SvcCatalogItemDependencyType (enumeration of type string) **Description** Required. The type of dependent component. Values are: • `FlowDefinition` • `IntegrationProviderDef` • `OmniScriptConfig` • `PreprocessorApexClass`

ServiceProcessItemGroup

A group of related ServiceProcessAttribute records.

Field Name	Description
`apiName`	**Field Type** string **Description** Required. The API Name of the group.

Field Name	Description
groupName	**Field Type** string **Description** Required. The name of the group.
sortOrder	**Field Type** int **Description** Required. The group display order.

Declarative Metadata Sample Definition

The following is an example of a ServiceProcess component.

```
<?xml version="1.0" encoding="UTF-8"?>
<ServiceProcess xmlns="http://soap.sforce.com/2006/04/metadata">
   <processLabel>EmailUpdate</processLabel>
   <usageType>FinancialServices</usageType>
   <serviceProcessAttributes>
      <label>EmailAddress</label>
      <developerName>EmailAddress</developerName>
      <dataType>Text</dataType>
      <groupApiName>Info</groupApiName>
   </serviceProcessAttributes>
   <serviceProcessDependencies>
      <dependencyReference>EmailPreprocessor</dependencyReference>
      <type>PreprocessorApexClass</type>
   </serviceProcessDependencies>
   <serviceProcessItemGroups>
        <apiName>Info</apiName>
        <groupName>Info</groupName>
        <sortOrder>1</sortOrder>
    </serviceProcessItemGroups>
</ServiceProcess>
```

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

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>ServiceProcess</name>
    </types>
    <version>57.0</version>
</Package>
```

Wildcard Support in the Manifest File

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

Usage Type

We recommend that you review these considerations before you retrieve or deploy service process metadata.

- If you deploy metadata with the same name as the definition when your service process definition is active, you get an error message. Deactivate the service process definition and try again.
- When your service process definition is inactive, consider these guidelines.
  - If a service process definition contains service catalog requests and service catalog request extended attribute values and you deploy metadata with the same name as the definition, you get an error message. You can't delete or change a service process that has service catalog requests with attribute values in it. Make sure that all records are deleted in service catalog requests and service catalog request extended attribute values before you deploy the metadata.
  - If a service process definition contains service catalog requests but doesn't contain service catalog request extended attribute values and you deploy the metadata with the same name, the deployment works as expected.
  - If a service process definition doesn't contain service catalog requests and you deploy the metadata with the same name, the deployment works as expected.

Apex Reference

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

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

ConnectApi Namespace

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

industriesintegrationfwk Namespace

The `industriesintegrationfwk` namespace provides interfaces for the Industries: Send Apex Async Request invocable action and for using the integration framework with Continuation.

industriesserviceprocess Namespace

The `industriesserviceprocess` namespace provides an interface for a preprocessor class that transforms and validates data for custom attributes in the Service Catalog Connect REST API.

Sample Apex Class to Create Case Records for Service Process Requests

When a service process request is submitted, an Apex class invokes the service process connect API to create a case. The apex class extracts the details provided for the service request and assigns these details to the data attributes defined for the service process in Service Process Studio. The Apex class then passes the attributes and their values to the connect API to create a case.

`ConnectApi` Namespace

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

For information about working with the `ConnectApi` classes, see Connect in Apex.

The following are the Service Process Studio classes in the `ConnectApi` namespace.

IServiceProcessConnectFamily Class
Create, update, or retrieve a service process.

IServiceProcessConnectFamily Input Classes
The following are input classes for `IServiceProcessConnectFamily`.

IServiceProcessConnectFamily Output Classes
The following are output classes for `IServiceProcessConnectFamily`.

IServiceProcessConnectFamily Class

Create, update, or retrieve a service process.

Namespace

ConnectApi

IServiceProcessConnectFamily Methods

The following are methods for `IServiceProcessConnectFamily`. All methods are static.

createCaseServiceProcess(serviceProcessRequestData)
Create a service process.

getCaseServiceProcess(svcCatalogRequestId)
Retrieve a service process.

updateCaseServiceProcesses(serviceProcessRequestData, svcCatalogRequestId)
Update a service process.

`createCaseServiceProcess(serviceProcessRequestData)`

Create a service process.

API Version

57.0

Requires Chatter

No

Signature

```
public static ConnectApi.ServiceProcessRepresentation
createCaseServiceProcess(ConnectApi.ServiceProcessRequestInputRepresentation
serviceProcessRequestData)
```

Parameters

serviceProcessRequestData
Type: ConnectApi.ServiceProcessRequestInputRepresentation

Input for creating or updating a service process.

Return Value

Type: ConnectApi.ServiceProcessRepresentation

getCaseServiceProcess(svcCatalogRequestId)

Retrieve a service process.

API Version

57.0

Requires Chatter

No

Signature

```
public static ConnectApi.ServiceProcessRecordRepresentation getCaseServiceProcess(String
svcCatalogRequestId)
```

Parameters

svcCatalogRequestId
Type: String

ID of the related Service Catalog Request. See SvcCatalogRequest.

Return Value

Type: ConnectApi.ServiceProcessRecordRepresentation

updateCaseServiceProcesses(serviceProcessRequestData, svcCatalogRequestId)

Update a service process.

API Version

58.0

Requires Chatter

No

Signature

```
public static ConnectApi.ServiceProcessRepresentation
updateCaseServiceProcesses(ConnectApi.ServiceProcessRequestInputRepresentation
serviceProcessRequestData, String svcCatalogRequestId)
```

Parameters

`serviceProcessRequestData`
Type: ConnectApi.ServiceProcessRequestInputRepresentation

Input for creating or updating a service process.

`svcCatalogRequestId`
Type: String

ID of the related Service Catalog Request. See SvcCatalogRequest.

Return Value

Type: ConnectApi.ServiceProcessRepresentation

IServiceProcessConnectFamily Input Classes

The following are input classes for `IServiceProcessConnectFamily`.

ConnectApi.documentInfoAttributes
Input for including documents in a service process.

ConnectApi.GenericObject
Input for generic object attributes.

ConnectApi.ServiceProcessRequestInputRepresentation
Input for creating or updating a service process.

ConnectApi.documentInfoAttributes

Input for including documents in a service process.

Name	Type	Description	Required or Optional	Available Version
`Id`	String	ID of the document.	Required	57.0
`Name`	String	Name of the document.	Required	57.0
`TypeId`	String	ID for the document type.	Optional	57.0

ConnectApi.GenericObject

Input for generic object attributes.

Property	Type	Description	Required or Optional	Available Version
`value`	`Object`	Field name-value pairs or a list of grouped field name-value pairs.	Required	57.0

ConnectApi.ServiceProcessRequestInputRepresentation

Input for creating or updating a service process.

Property	Type	Description	Required or Optional	Available Version
`attributes`	Map<String, ConnectApiGenericObject>	Field name-value pairs, object names and field name-value pairs, or both. These fields and objects store base and extended attributes.	Required	57.0
`caseInfo`	Map<String, ConnectApiGenericObject>	Field name-value pairs for the Case object.	Optional	57.0
`documentInfo`	List<ConnectApi.documentInfoAttributes>	List of documents.	Optional	57.0
`svcCatalogItemDefApiName`	String	API Name of the related Service Catalog Item Definition. See SvcCatalogItemDef.	Required	57.0

IServiceProcessConnectFamily Output Classes

The following are output classes for `IServiceProcessConnectFamily`.

ConnectApi.GenericObjectOutput
Output for generic object attributes.

ConnectApi.ServiceCatalogItemAttributes
Output for Service Catalog Item Attribute records.

ConnectApi.ServiceProcessRecordRepresentation
Service process record output.

ConnectApi.ServiceProcessRepresentation
Output for creating a service process.

ConnectApi.GenericObjectOutput

Output for generic object attributes.

Property Name	Type	Description	Available Version
value	Object	Field name-value pairs or a list of grouped field name-value pairs.	57.0

ConnectApi.ServiceCatalogItemAttributes

Output for Service Catalog Item Attribute records.

Property Name	Type	Description	Available Version
data	Map<String, ConnectApiGenericObjectOutput>	Attributes defined by Service Catalog Item Attribute records, which are part of the related Service Catalog Item Definition. See SvcCatalogItemDef.	57.0

ConnectApi.ServiceProcessRecordRepresentation

Service process record output.

Property Name	Type	Description	Available Version
attributes	ConnectApi.ServiceCatalogItemAttributes	Attributes defined by Service Catalog Item Attribute records, which are part of the related Service Catalog Item Definition. For the property details, see *ServiceCatalogItemAttribute* in SvcCatalogItemDef.	57.0
caseId	String	Case ID.	57.0
caseNumber	String	Case number.	57.0
svcCatalogItemDefApiName	String	API Name of the related Service Catalog Item Definition.	57.0
svcCatalogRequestId	String	ID of the related Service Catalog Request. See SvcCatalogRequest.	57.0

ConnectApi.ServiceProcessRepresentation

Output for creating a service process.

Property Name	Type	Description	Available Version
caseId	String	Case ID.	57.0
caseNumber	String	Case number.	57.0
caseStatus	String	Case status.	57.0
svcCatalogRequestId	String	Service catalog request ID.	57.0

industriesintegrationfwk Namespace

The `industriesintegrationfwk` namespace provides interfaces for the Industries: Send Apex Async Request invocable action and for using the integration framework with Continuation.

The following are the interfaces in the `industriesintegrationfwk` namespace.

ProcessIntegrationProvider Interface

Implement the ProcessIntegrationProvider interface to create a class for use with the Industries: Send Apex Async Request invocable action.

ServiceIntegrationProvider Interface

Implement the ServiceIntegrationProvider interface to use the integration framework with Continuation.

EDITIONS

Available in: Lightning Experience

Available when admin settings for Service Process Studio are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

ProcessIntegrationProvider Interface

Implement the ProcessIntegrationProvider interface to create a class for use with the Industries: Send Apex Async Request invocable action.

Namespace

industriesintegrationfwk

Usage

The Fee Reversal and Address Update service processes use classes that implement the ProcessIntegrationProvider interface to handle their attributes. This class fetches the svcCatalogRequestId after the Service Catalog Resource connect API has been invoked.

ProcessIntegrationProvider Methods

ProcessIntegrationProvider Methods

The following are methods for `ProcessIntegrationProvider`.

executeCallout(requestGuid, inputRecordId, payload, attributes)

Invokes an API call with a SvcCatalogRequest ID and Integration Definition attributes.

getProviderAttributes()

Tells the integration framework what attributes are expected and provides defaults for values that might be missing in the Integration Definition.

`executeCallout(requestGuid, inputRecordId, payload, attributes)`

Invokes an API call with a SvcCatalogRequest ID and Integration Definition attributes.

Signature

```
public IntegrationCalloutResponse executeCallout(String requestGuid, String
inputRecordId, String payload, Map<String, Object> attributes)
```

Parameters

requestGuid
Type: String

Represents the Request GUID that uniquely identifies the API call.

inputRecordId
Type: String

Represents the input record that contains the payload for the API call.

payload
Type: String

Represents an additional payload provided outside of the inputRecordId.

attributes
Type: Map<String,Object>

Represents attribute data from the Integration Definition record.

Return Value

Type: IntegrationCalloutResponse object

getProviderAttributes()

Tells the integration framework what attributes are expected and provides defaults for values that might be missing in the Integration Definition.

Signature

```
public List<ApexProviderAttr> getProviderAttributes()
```

Parameters

None

Return Value

Type: List<ApexProviderAttr>

ServiceIntegrationProvider Interface

Implement the ServiceIntegrationProvider interface to use the integration framework with Continuation.

Namespace

industriesintegrationfwk

Usage

The IntegrationHandler class calls a class that implements this interface. The ServiceExcellenceAlertCard and ServiceExcellenceGenericAlertCard have Integration Procedure data sources that call the IntegrationHandler class. These FlexCards display information about financial accounts.

ServiceIntegrationProvider Methods

ServiceIntegrationProvider Methods

The following are methods for `ServiceIntegrationProvider`.

getCalloutRequest(requestId, params, attributes)
Fetches the Continuation object, which stores the API call request and its attributes.

getCalloutResponse(httpResponseList, state, attributes)
Fetches the response data from the API call and performs postprocessing.

getProviderAttributes()
Tells the integration framework what attributes are expected and provides defaults for values that might be missing in the Integration Definition.

`getCalloutRequest(requestId, params, attributes)`

Fetches the Continuation object, which stores the API call request and its attributes.

Signature

```
public IntegrationCalloutRequest getCalloutRequest(String requestId, Map<String, String>
params, Map<String, Object> attributes)
```

Parameters

`requestId`
Type: String

Represents the Request GUID that uniquely identifies the API call.

`params`
Type: Map<String,String>

Represents the input data containing the payload for the API call.

`attributes`
Type: Map<String,Object>

Represents attribute data from the Integration Definition record.

Return Value

Type: IntegrationCalloutRequest object

Usage

Used by the IntegrationHandler class to retrieve the Continuation object.

getCalloutResponse(httpResponseList, state, attributes)

Fetches the response data from the API call and performs postprocessing.

Signature

```
public IntegrationCalloutResponse getCalloutResponse(List<HttpResponse> httpResponseList,
Object state, Map<String, Object> attributes)
```

Parameters

`httpResponseList`
: Type: List<HttpResponse>

Represents the response data from the API call.

`state`
: Type: Object

Represents the value of the State property of the Continuation object created by the getCalloutRequest method.

`attributes`
: Type: Map<String,Object>

Represents attribute data from the Integration Definition record.

Return Value

Type: IntegrationCalloutResponse object

Usage

Used by the IntegrationHandler class for postprocessing after the API call.

getProviderAttributes()

Tells the integration framework what attributes are expected and provides defaults for values that might be missing in the Integration Definition.

Signature

```
public List<ApexProviderAttr> getProviderAttributes()
```

Parameters

None

Return Value

Type: List<ApexProviderAttr>

Usage

Used by the IntegrationHandler class to retrieve default values from the Integration Definition record.

industriesserviceprocess Namespace

The `industriesserviceprocess` namespace provides an interface for a preprocessor class that transforms and validates data for custom attributes in the Service Catalog Connect REST API.

The following are the interface and its supporting class in the `industriesserviceprocess` namespace.

EDITIONS

Available in: Lightning Experience

Available when admin settings for Service Process Studio are enabled. The Salesforce org must have the CRM Plus license and the product's CRM license.

ServiceProcessRequestPreProcessor Interface

Implement the ServiceProcessRequestPreProcessor interface to create a preprocessor class that transforms and validates data for custom attributes in the Service Catalog Connect REST API. Using a preprocessor is optional.

ServiceProcessPreProcessorResponse Class

The ServiceProcessPreProcessorResponse class defines the response type of the processServiceProcessRequest method in the ServiceProcessRequestPreProcessor interface.

ServiceProcessRequestPreProcessor Interface

Implement the ServiceProcessRequestPreProcessor interface to create a preprocessor class that transforms and validates data for custom attributes in the Service Catalog Connect REST API. Using a preprocessor is optional.

Namespace

industriesserviceprocess

ServiceProcessRequestPreProcessor Methods

ServiceProcessRequestPreProcessor Example Implementation

This is an example implementation of the `industriesserviceprocess.ServiceProcessRequestPreProcessor` interface.

ServiceProcessRequestPreProcessor Methods

The following are methods for `ServiceProcessRequestPreProcessor`.

processServiceProcessRequest(serviceProcessDefId, caseInfo, serviceProcessAttrs)

Transforms and validates Case attributes or service request attributes. The processServiceProcessRequest is an abstract method.

`processServiceProcessRequest(serviceProcessDefId, caseInfo, serviceProcessAttrs)`

Transforms and validates Case attributes or service request attributes. The processServiceProcessRequest is an abstract method.

Signature

```
ServiceProcessPreProcessorResponse processServiceProcessRequest(String
serviceProcessDefId, Map<String, Object> caseInfo, Map<String, Object>
serviceProcessAttrs)
```

Parameters

`serviceProcessDefId`
Type: String

Represents the Developer Name of the service request.

`caseInfo`
Type: Map<String,Object>

Represents Case attributes in the input payload in key-value pair format.

`serviceProcessAttrs`
Type: Map<String,Object>

Represents service request attributes in the input payload in key-value pair format.

Return Value

Type: ServiceProcessPreProcessorResponse object

ServiceProcessRequestPreProcessor Example Implementation

This is an example implementation of the `industriesserviceprocess.ServiceProcessRequestPreProcessor` interface.

```
public class StopCheckPayment implements
industriesserviceprocess.ServiceProcessRequestPreProcessor {
  public industriesserviceprocess.ServiceProcessPreProcessorResponse
processServiceProcessRequest
        (String serviceProcessDefId, Map<String, Object> caseInfo, Map<String, Object>
serviceProcessAttrs) {
          industriesserviceprocess.ServiceProcessPreProcessorResponse response = null;
            Date paymentDate = (Date) serviceProcessAttrs.get('paymentDate');
            if(paymentDate < Date.today()) {
                response =
                new industriesserviceprocess.ServiceProcessPreProcessorResponse('Payment
Date cannot be before the current date',
                          false,
industriesserviceprocess.ServiceProcessPreProcessorErrorTypes.VALIDATION_ERROR);
            } else {
                response =
                new industriesserviceprocess.ServiceProcessPreProcessorResponse(true);
            }
            return response;
        }
}
```

ServiceProcessPreProcessorResponse Class

The ServiceProcessPreProcessorResponse class defines the response type of the processServiceProcessRequest method in the ServiceProcessRequestPreProcessor interface.

Namespace

industriesserviceprocess

ServiceProcessPreProcessorResponse Methods

ServiceProcessPreProcessorResponse Methods

The following are constructors for `ServiceProcessRequestPreProcessor`.

ServiceProcessPreProcessorResponse(errorMessage, isSuccessful, errorType)

The return type of the processServiceProcessRequest method in the ServiceProcessRequestPreProcessor interface, which can set a custom error message.

ServiceProcessPreProcessorResponse(isSuccessful)

The return type of the processServiceProcessRequest method in the ServiceProcessRequestPreProcessor interface if there are no error messages.

`ServiceProcessPreProcessorResponse(errorMessage, isSuccessful, errorType)`

The return type of the processServiceProcessRequest method in the ServiceProcessRequestPreProcessor interface, which can set a custom error message.

Signature

```
global ServiceProcessPreProcessorResponse(String errorMessage, boolean isSuccessful,
industriesserviceprocess.ServiceProcessPreProcessorErrorTypes errorType)
```

Parameters

`errorMessage`

Type: String

Represents a custom error message in case invocation of the ServiceProcessRequestPreProcessor.processServiceProcessRequest() method results in an error or exception.

`isSuccessful`

Type: Boolean

Indicates whether the ServiceProcessRequestPreProcessor.processServiceProcessRequest() method is successful. Set this parameter to false if the custom validation fails.

`errorType`

Type: ServiceProcessPreProcessorErrorTypes

ServiceProcessPreProcessorErrorTypes is an enum with attributes NO_ERROR, GENERIC_ERROR, or VALIDATION_ERROR.

Return Value

Type: ServiceProcessPreProcessorResponse object

`ServiceProcessPreProcessorResponse(isSuccessful)`

The return type of the processServiceProcessRequest method in the ServiceProcessRequestPreProcessor interface if there are no error messages.

Signature

```
global ServiceProcessPreProcessorResponse(boolean isSuccessful)
```

Parameters

`isSuccessful`

Type: Boolean

Indicates whether the ServiceProcessRequestPreProcessor.processServiceProcessRequest() method is successful. Set this parameter to true if the custom validation succeeds.

Return Value

Type: ServiceProcessPreProcessorResponse object

Sample Apex Class to Create Case Records for Service Process Requests

When a service process request is submitted, an Apex class invokes the service process connect API to create a case. The apex class extracts the details provided for the service request and assigns these details to the data attributes defined for the service process in Service Process Studio. The Apex class then passes the attributes and their values to the connect API to create a case.

Apex Class to Create a Case Record for a Transaction Dispute Service Process Request

This sample Apex class helps in processing a request related to a transaction dispute. It extracts details, such as the financial account associated with the dispute, dispute type and subtype, transaction description, status, dispute received date, disputed amount, actual amount, approved amount, supporting documents, and the list of disputed transactions. It maps these details to the data attributes that are defined for the service process in Service Process Studio. The Apex class then constructs an API payload using the retrieved data attributes and their extracted values and passes the payload to the connect API to create a case. When a case is created, service catalog request, dispute, and dispute items records are created.

The Apex class retrieves these data attributes. This set contains a mix of complex attributes, which includes attributes of type lookup, text, currency, date, and ListOfMaps. While defining the data attributes, you can choose relevant objects where to store the values for these attributes. For more information, see Considerations for Selecting Base Objects

DATA ATTRIBUTE NAME	DATA ATTRIBUTE API NAME	PARENT DATA ATTRIBUTE	DATA TYPE
Account Id	account_id	–	Lookup
Assessment Id	assessment_id	–	Lookup
Financial Account	financial_account_id	–	Lookup
Dispute Type	dispute_type	–	Text

DATA ATTRIBUTE NAME	DATA ATTRIBUTE API NAME	PARENT DATA ATTRIBUTE	DATA TYPE
Dispute Subtype	dispute_subtype	–	Text
Description	description	–	Text
Disputed Transactions Info	disputed_transactions_info	–	ListOfMaps
Transaction Description	transaction_description	disputed_transactions_info	Text
Transaction Identifier	transaction_identifier	disputed_transactions_info	Text
Transaction Date	transaction_date	disputed_transactions_info	Date
Transaction Amount	transaction_amount	disputed_transactions_info	Currency
Status	status	–	Text
Received Date	received_date	–	Date
Actual Amount	actual_amount	–	Currency
Disputed Amount	disputed_amount	–	Currency
Approved Amount	approved_amount	–	Currency

This is a sample API payload constructed by the Apex class for the Connect API. The payload is based on the values extracted for the data attributes that were defined to capture the data for the service process request.

```
{
  "attributes": {
    "data": {
      "disputed_transactions_info": {
        "data": {
          "dispute_type": {
            "value": "Consumer Dispute"
          },
          "dispute_subtype": {
            "value": "Undelivered Product or Service"
          },
          "description": {
            "value": "Order was never delivered but charge still appears on credit card
statement. Order was placed via their website acmemerchant.com"
          },
          "received_date": {
            "value": "2023-07-14"
          },
          "account_id": {
            "value": "001DI000001o10QYAQ"
          },
          "assessment_id": {
            "value": "0U3DI000000018m0AA"
          },
          "financial_account_id": {
            "value": "a0EDI000000Ce6W2AS"
          },
```

```
          "actual_amount": {
            "value": 593.63
          },
          "disputed_amount": {
            "value": 400
          },
          "approved_amount": {
            "value": 400
          },
          "status": {
            "value": "Submitted"
          }
        }
      },
      "disputed_transactions_info": {
        "value": [
          {
            "transaction_date": "2023-01-01",
            "transaction_identifier": "1",
            "transaction_amount": 213.1,
            "transaction_description": "t1"
          },
          {
            "transaction_date": "2023-01-01",
            "transaction_identifier": "2",
            "transaction_amount": 150.94,
            "transaction_description": "t2"
          },
          {
            "transaction_date": "2023-01-01",
            "transaction_identifier": "3",
            "transaction_amount": 199,
            "transaction_description": "t3"
          },
          {
            "transaction_date": "2023-01-01",
            "transaction_identifier": "4",
            "transaction_amount": 30.59,
            "transaction_description": "t4"
          }
        ]
      }
    }
  },
  "caseInfo": {
    "data": {
      "Subject": {
        "value": "Julia Green Transaction Dispute Request"
      },
      "Origin": {
        "value": "Phone"
      },
      "AccountId": {
        "value": "001DI000001o10QYAQ"
```

```
      }
    }
  },
  "documentInfo": {
    "data": [
      {
        "id": "content document id-1",
        "name": "document name-1"
      },
      {
        "id": "content document id-2",
        "name": "document name-2"
      }
    ]
  },
  "svcCatalogItemDefApiName": "Dispute_Management"
}
```

You can use this sample Apex class as a reference to create an Apex class that suits your transaction dispute service process requirements.

```
global with sharing class DisputeManagementHelper implements System.Callable {

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

        Map<String, Object> inputMap = (Map<String, Object>)args.get('input');
        Map<String, Object> outputMap = (Map<String, Object>)args.get('output');
        Map<String, Object> options = (Map<String, Object>)args.get('options');

        if (action == 'raiseDispute') {

            String accountId = (String)inputMap.get('AccountId');
            String assessmentId = (String)inputMap.get('AssessmentId');
            String FAId = (String)inputMap.get('FinancialAccountId');
            String disputeType = (String)inputMap.get('Type');
            String disputeSubType = (String)inputMap.get('SubType');
            String description = (String)inputMap.get('Description');
          List<Object> transactions = (List<Object>)inputMap.get('SelectedTransactions');


            // Set the input rep
            ConnectApi.ServiceProcessRequestInputRepresentation input = new
ConnectApi.ServiceProcessRequestInputRepresentation();
            input.svcCatalogItemDefApiName =
(String)inputMap.get('svcCatalogItemDefApiName');
            input.caseInfo = new Map<String, ConnectApi.GenericObject>();
            input.attributes = new Map<String, ConnectApi.GenericObject>();
            input.documentInfo = new List<ConnectApi.DocumentInfoAttributes>();

            //set case info
            ConnectApi.GenericObject subjectObj = new ConnectApi.GenericObject();
            subjectObj.value = 'Transaction Dispute';
            input.caseInfo.put('Subject', subjectObj);


            //set attributes
```

```
            ConnectApi.GenericObject accountIdObj = new ConnectApi.GenericObject();
            accountIdObj.value = accountId;

            ConnectApi.GenericObject assessmentIdObj = new ConnectApi.GenericObject();
            assessmentIdObj.value = assessmentId;

          ConnectApi.GenericObject financialAccountIdObj = new ConnectApi.GenericObject();

            financialAccountIdObj.value = FAId;

            ConnectApi.GenericObject disputeTypeObj = new ConnectApi.GenericObject();
            disputeTypeObj.value = disputeType;

            ConnectApi.GenericObject disputeSubTypeObj = new ConnectApi.GenericObject();
            disputeSubTypeObj.value = disputeSubType;

            ConnectApi.GenericObject descriptionObj = new ConnectApi.GenericObject();
            descriptionObj.value = description;

            ConnectApi.GenericObject createdDateObj = new ConnectApi.GenericObject();
            createdDateObj.value = Datetime.now().format('yyyy-MM-dd');

            ConnectApi.GenericObject statusObj = new ConnectApi.GenericObject();
            statusObj.value = 'Submitted';


            List<Map<String, Object>> transactionsList = new List<Map<String, Object>>();


            for (Object t : transactions) {

                Map<String, Object> transactionObj = (Map<String, Object>)t;
                Map<String, Object> transactionObjMap = new Map<String, Object>();

                String transactionDescription =
(String)transactionObj.get('TransactionDescription');
                String transactionId = (String)transactionObj.get('TransactionId');
              String transactionDate = (String)transactionObj.get('TransactionPostedDate');

                Double transactionAmt = (Double)transactionObj.get('TransactionAmount');

                transactionObjMap.put('transaction_description', transactionDescription);

                transactionObjMap.put('transaction_identifier', transactionId);
             transactionObjMap.put('transaction_date', transactionDate.split('T', 2)[0]);

                transactionObjMap.put('transaction_amount', transactionAmt);

                transactionsList.add(transactionObjMap);
            }

            ConnectApi.GenericObject actualAmtObj = new ConnectApi.GenericObject();
            actualAmtObj.value = transactionsList[0].get('transaction_amount');
```

```
            ConnectApi.GenericObject disputedAmtObj = new ConnectApi.GenericObject();
            disputedAmtObj.value = transactionsList[0].get('transaction_amount');

            ConnectApi.GenericObject transactionObj = new ConnectApi.GenericObject();
            transactionObj.value = transactionsList;

            if (!String.isBlank(assessmentId)) {
                input.attributes.put('assessment_id', assessmentIdObj);
            }
            input.attributes.put('account_id', accountIdObj);
            input.attributes.put('received_date', createdDateObj);
            input.attributes.put('financial_account_id', financialAccountIdObj);
            input.attributes.put('description', descriptionObj);
            input.attributes.put('status', statusObj);
            input.attributes.put('actual_amount', actualAmtObj);
            input.attributes.put('disputed_amount', disputedAmtObj);
            input.attributes.put('disputed_transactions_info', transactionObj);


            // retrieve the documentInfo by the customer
            List<Object> uploadedDocumentInfoList =
(List<Object>)inputMap.get('documentInfo');

            // set docInfo
            Set<ConnectApi.DocumentInfoAttributes> docInfoSet = new
Set<ConnectApi.DocumentInfoAttributes>();
            if (uploadedDocumentInfoList != null && !uploadedDocumentInfoList.isEmpty())
{
                for(Object uploadedDocInfoMap : uploadedDocumentInfoList) {
                    ConnectApi.DocumentInfoAttributes doc = new
ConnectApi.DocumentInfoAttributes();
                 Map<String, Object> uploadMap = (Map<String, Object>)uploadedDocInfoMap;

                    doc.id = (String) uploadMap.get('id');
                    doc.name = (String) uploadMap.get('name');
                    docInfoSet.add(doc);
                }
            }
            for (ConnectApi.DocumentInfoAttributes docInfoAttr : docInfoSet) {
                input.documentInfo.add(docInfoAttr);
            }
            System.debug(input);

            // Invoke API
            Map<String, String> responseMap = new Map<String, String>();
            ConnectApi.ServiceProcessRepresentation output =
ConnectApi.IServiceProcessConnectFamily.createCaseServiceProcess(input);
            responseMap.put('caseId', output.caseId);
            responseMap.put('caseNumber', output.caseNumber);
            responseMap.put('svcCatalogRequestId', output.svcCatalogRequestId);

            outputMap.put('apiResponse', responseMap);
            return outputMap;
        }
```

```
        return null;
    }
}
```

Service Process Studio Invocable Actions

Use actions to invoke Service Process Studio actions in a flow.

Note: You can also use the Invocable namespace, which contains the classes and methods required to invoke the Service Process Studio invocable actions from Apex. See Invocable Namespace.

Integration Definition Actions

Perform the asynchronous operation configured in an Integration Definition without blocking the invoking flow. The results of the asynchronous operation are published in a platform event. The calling flow can wait for the Platform Event using a pause step if required. The asynchronous operation is typically an API call.

Integration Definition Actions

Perform the asynchronous operation configured in an Integration Definition without blocking the invoking flow. The results of the asynchronous operation are published in a platform event. The calling flow can wait for the Platform Event using a pause step if required. The asynchronous operation is typically an API call.

These actions are available in API version 57.0 and later.

Supported REST HTTP Methods

URI

`/services/data/v57.0/actions/standard/industriesSendApexAsyncRequest`

`/services/data/v57.0/actions/standard/industriesSendExtAsyncRequest`

Formats

JSON, XML

HTTP Methods

POST

Authentication

`Authorization: Bearer token`

Industries: Send Apex Async Request

Perform an asynchronous operation that calls an Apex class on the backend. This class must implement the ServiceIntegrationProvider interface.

Inputs

Input	Details
RequestGuid	Type: String

Input	Details
	Description: A unique identifier for the request. The value can be any string. In the Integration Definition in Setup, setting the RequestGuid to this value is recommended: `{!$Flow.InterviewGuid}` This creates an automatically generated ID based on the flow that calls the action.
IntegrationDefinitionDevName	Type: String Description: The Developer Name of the Integration Definition in Setup that specifies the Apex class to call.
ContextRecordId	Type: String Description: The ID of the record that provides input data for the Apex class. This is the ID of an object of the type that the Apex class accepts. The default Apex class accepts a SvcCatalogRequest object.

Sample Input

```
{
   "RequestGuid": "1d926919bc721ceea1bde0918184795922c0-7f5f",
   "IntegrationDefinition": "Account Lookup",
   "ServiceProcessId": "001RO0000045yv4YAA"
}
```

Outputs

This action has no outputs.

Error Scenarios

Error Scenario	API Error Code	Error Message
A parameter is missing a value.	REQUIRED_FIELD_MISSING	You must specify a value for the {0} parameter.
Input parameters have incorrect data types.	INVALID_TYPE	The value specified for the {0} parameter is the wrong data type. Specify a value with a {1} data type and try again.
More than one request is sent to the invocable action.	TOO_MANY_REQUESTS	This action can process only one record at a time. Provide a single {0} for the {1} parameter and try again.
An input parameter is incorrect.	INVALID_INPUT	The value "{0}" for the {1} parameter is invalid.

Error Scenario	API Error Code	Error Message
The ID specified for a field is invalid.	INVALID_INPUT	Something's not right with the ID "{0}" specified for the {1} parameter. Check it and try again.

Industries: Send External Async Request

Perform an asynchronous operation that calls an external service via a REST API. It can also use an Integration Procedure for preprocessing, postprocessing, or both.

Inputs

Input	Details
InputProcessorContextId	Type: String Description: The ID of the record that provides payload data for the external service when the input configuration defined in the Integration Definition runs.
OutputProcessorContextId	Type: String Description: The optional ID for the record updated after the output configuration defined in the Integration Definition runs.
RequestGuid	Type: String Description: A unique identifier for the request. The value can be any string. In the Integration Definition in Setup, setting the RequestGuid to this value is recommended: `{!$Flow.InterviewGuid}` This creates an automatically generated ID based on the flow that calls the action.
IntegrationDefinitionDevName	Type: String Description: The Developer Name of the Integration Definition in Setup that specifies the external service to call.

Sample Input

```
{
   "InputDataContextId": "001RO0000045yv4YAA",
   "OutputDataContextId": "001RO0000045yv4YAA",
   "RequestGuid": "1d926919bc721ceea1bde0918184795922c0-7f5f",
   "IntegrationDefinition": "Onfido- IDV Application ID generation"
}
```

Outputs

This action has no outputs.

Error Scenarios

Error Scenario	API Error Code	Error Message
An unexpected exception occurs while the program process runs.	UNKNOWN_EXCEPTION	Something went wrong when running the "{0}" external service. Try again later.
Input parameters have incorrect data types.	INVALID_TYPE	The value specified for the {0} parameter is the wrong data type. Specify a value with a {1} data type and try again.
More than one request is sent to the invocable action.	TOO_MANY_REQUESTS	This action can process only one record at a time. Provide a single record ID for the {0} parameter and try again.
An input parameter is incorrect.	INVALID_INPUT	The value "{0}" for the {1} parameter is invalid.
The external service is incorrect.	INVALID_INPUT	The "{0}" value specified for the integrationDefinition isn't a valid external service developer name. Check it and try again.

Service Process Studio Connect APIs

Use the Service Process Studio Connect API to create an extended Case object that includes custom data about a customer request such as a fee reversal or address update.

Resources
Use Service Process Studio API resources to create, update, and retrieve information about service processes.

Request Bodies
Use Service Process Studio API request bodies to request service process information.

Response Bodies
Use Service Process Studio API response bodies to review retrieved service process information.

Resources

Use Service Process Studio API resources to create, update, and retrieve information about service processes.

Service Process
Create a service process.

Service Process Layout Data

Retrieve service process layout data.

Service Process Update

Retrieve or update a service process.

Service Process

Create a service process.

Resource

```
/connect/service-excellence/service-catalog-request
```

Available version

57.0

Requires Chatter

No

HTTP methods

POST

Request body for POST

JSON example

```
{
  "attributes": {
    "data": {
      "IncidentDate": {
        "value": "2023-03-10"
      },
      "ProductType": {
        "value": "ATM / debit card"
      },
      "CaseParticipantInfo": {
        "value": [
          {
            "Participant": "003xx000004WhGKAA0",
            "Status": "Active",
            "age_of_participant": 30
          },
          {
            "Participant": "003xx000004WhGdAAK",
            "Status": "Active",
            "age_of_participant": 20
          }
        ]
      },
      "accountInfo": {
        "value": [
          {
            "accountId": "001B000001UZDhOIAX",
            "accountName": "Rachael Adams"
          },
          {
```

```
            "accountId": "001B000001Ua331IAB",
            "accountName": "Robert Williams"
          }
        ]
      }
      "case_status": {
        "value": "Active"
      },
      "case_description": {
        "value": "Sample test"
      },
      "base_field": {
        "value": "Value on base field"
      },
      "cities": {
        "value": [
          "Delhi",
          "Hyderabad"
        ]
      }
    }
  },
  "svcCatalogItemDefApiName": "fsc_complaint_management"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`attributes`	Map<String, Generic Object>	Field name-value pairs, object names and field name-value pairs, or both. The attributes property populates the base and extended attributes defined in Service Process Studio and must match their structure.	Required	57.0
`caseInfo`	Map<String, Generic Object>	Field name-value pairs for the Case object.	Optional	57.0
`documentInfo`	Document Info Attributes[]	List of documents.	Optional	57.0
`svcCatalogItemDefApiName`	String	API Name of the related Service Catalog Item Definition. See SvcCatalogItemDef.	Required	57.0

Request parameters for POST

Parameter Name	Type	Description	Required or Optional	Available Version
~~serviceProcessRequestData~~	Object	Top-level parameter for the request body.	Required	57.0

Response body for POST

Service Process Output

Service Process Layout Data

Retrieve service process layout data.

Resource

```
/connect/service-excellence/service-catalog-request/layout-data/case/Id
```

Available version

58.0

Requires Chatter

No

HTTP methods

GET

Response body for GET

Service Process Request Layout Data

Service Process Update

Retrieve or update a service process.

Resource

```
/connect/service-excellence/service-catalog-request/svcCatalogRequestId
```

Available version

57.0

Requires Chatter

No

HTTP methods

GET PATCH

Response body for GET

Service Process Record

Request body for PATCH

JSON example

```
{
  "attributes": {
    "data": {
      "IncidentDate": {
        "value": "2023-03-10"
      },
      "ProductType": {
        "value": "ATM / debit card"
      },
      "CaseParticipantInfo": {
        "value": [
```

```
          {
            "Participant": "003xx000004WhGKAA0",
            "Status": "Active",
            "age_of_participant": 30
          },
          {
            "Participant": "003xx000004WhGdAAK",
            "Status": "Active",
            "age_of_participant": 20
          }
        ]
      },
      "accountInfo": {
        "value": [
          {
            "accountId": "001B000001UZDhOIAX",
            "accountName": "Rachael Adams"
          },
          {
            "accountId": "001B000001Ua331IAB",
            "accountName": "Robert Williams"
          }
        ]
      }
      "case_status": {
        "value": "Active"
      },
      "case_description": {
        "value": "Sample test"
      },
      "base_field": {
        "value": "Value on base field"
      },
      "cities": {
        "value": [
          "Delhi",
          "Hyderabad"
        ]
      }
    }
  },
  "svcCatalogItemDefApiName": "fsc_complaint_management"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`attributes`	Map<String, Generic Object>	Field name-value pairs, object names and field name-value pairs, or both. The attributes property populates the base and extended attributes defined in	Required	57.0

Name	Type	Description	Required or Optional	Available Version
		Service Process Studio and must match their structure.		
`caseInfo`	Map<String, Generic Object>	Field name-value pairs for the Case object.	Optional	57.0
`documentInfo`	Document Info Attributes[]	List of documents.	Optional	57.0
`svcCatalogItemDefApiName`	String	API Name of the related Service Catalog Item Definition. See SvcCatalogItemDef.	Required	57.0

Request parameters for PATCH

Parameter Name	Type	Description	Required or Optional	Available Version
~~serviceProcessRequestData~~	Object	Top-level parameter for the request body.	Required	58.0

Response body for PATCH

Service Process Output

Request Bodies

Use Service Process Studio API request bodies to request service process information.

Document Info Attributes
Input for including documents in a service process.

Generic Object
Input for generic object attributes.

Service Process Request
Input for creating or updating a service process.

Document Info Attributes

Input for including documents in a service process.

JSON example

```
{
  "documentInfo": [
    {
      "Id": "Doc1",
      "Name": "Receipt",
      "TypeId": "Transaction"
    },
```

```
    {
      "Id": "Doc2",
      "Name": "Statement",
      "TypeId": "Transaction"
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`Id`	String	ID of the document.	Required	57.0
`Name`	String	Name of the document.	Required	57.0
`TypeId`	String	ID for the document type.	Optional	57.0

Generic Object

Input for generic object attributes.

JSON example

```
{
  "value": [
    {
      "Participant": "003xx000004WhGKAA0",
      "Status": "Active",
      "age_of_participant": 30
    },
    {
      "Participant": "003xx000004WhGdAAK",
      "Status": "Active",
      "age_of_participant": 20
    }
  ]
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`value`	Object	Field name-value pairs or a list of grouped field name-value pairs.	Required	57.0

Service Process Request

Input for creating or updating a service process.

JSON example

```
{
  "attributes": {
    "data": {
      "IncidentDate": {
        "value": "2023-03-10"
      },
      "ProductType": {
        "value": "ATM / debit card"
      },
      "CaseParticipantInfo": {
        "value": [
          {
            "Participant": "003xx000004WhGKAA0",
            "Status": "Active",
            "age_of_participant": 30
          },
          {
            "Participant": "003xx000004WhGdAAK",
            "Status": "Active",
            "age_of_participant": 20
          }
        ]
      },
      "accountInfo": {
        "value": [
          {
            "accountId": "001B000001UZDhOIAX",
            "accountName": "Rachael Adams"
          },
          {
            "accountId": "001B000001Ua331IAB",
            "accountName": "Robert Williams"
          }
        ]
      }
      "case_status": {
        "value": "Active"
      },
      "case_description": {
        "value": "Sample test"
      },
      "base_field": {
        "value": "Value on base field"
      },
      "cities": {
        "value": [
          "Delhi",
          "Hyderabad"
        ]
      }
    }
  },
```

```
  "svcCatalogItemDefApiName": "fsc_complaint_management"
}
```

Properties

Name	Type	Description	Required or Optional	Available Version
`attributes`	Map<String, Generic Object>	Field name-value pairs, object names and field name-value pairs, or both. The attributes property populates the base and extended attributes defined in Service Process Studio and must match their structure.	Required	57.0
`caseInfo`	Map<String, Generic Object>	Field name-value pairs for the Case object.	Optional	57.0
`documentInfo`	Document Info Attributes[]	List of documents.	Optional	57.0
`svcCatalogItemDefApiName`	String	API Name of the related Service Catalog Item Definition. See SvcCatalogItemDef.	Required	57.0

Response Bodies

Use Service Process Studio API response bodies to review retrieved service process information.

Generic Object Output
Output for generic object attributes.

Service Catalog Item Attributes
Output for Service Catalog Item Attribute records.

Service Catalog Item Group
Service process layout data group output.

Service Process Output
Output for creating a service process.

Service Process Record
Service process record output.

Service Process Request Layout Data
Service process layout data output.

Generic Object Output

Output for generic object attributes.

Property Name	Type	Description	Filter Group and Version	Available Version
value	Object	Field name-value pairs or a list of grouped field name-value pairs.	Big, 57.0	57.0

Service Catalog Item Attributes

Output for Service Catalog Item Attribute records.

Property Name	Type	Description	Filter Group and Version	Available Version
data	Map<String, Generic Object Output>	Attributes defined by Service Catalog Item Attribute records, which are part of the related Service Catalog Item Definition. See SvcCatalogItemDef.	Big, 57.0	57.0

Service Catalog Item Group

Service process layout data group output.

Property Name	Type	Description	Filter Group and Version	Available Version
apiName	String	API Name of the group.	Small, 58.0	58.0
attributes	List<Map<String, Object>>	Field name-value pairs that store base and extended attributes.	Big, 58.0	58.0
groupId	String	ID of the group.	Small, 58.0	58.0
groupName	String	Name of the group.	Small, 58.0	58.0
sortOrder	Integer	Group display order.	Small, 58.0	58.0

Service Process Output

Output for creating a service process.

Property Name	Type	Description	Filter Group and Version	Available Version
caseId	String	Case ID.	Big, 57.0	57.0
caseNumber	String	Case number.	Big, 57.0	57.0
caseStatus	String	Case status.	Big, 57.0	57.0
svcCatalog RequestId	String	Service catalog request ID.	Big, 57.0	57.0

Service Process Record

Service process record output.

Property Name	Type	Description	Filter Group and Version	Available Version
`attributes`	Service Catalog Item Attributes	Attributes defined by Service Catalog Item Attribute records, which are part of the related Service Catalog Item Definition. See SvcCatalogItemDef.	Big, 57.0	57.0
`caseId`	String	Case ID.	Big, 57.0	57.0
`caseNumber`	String	Case number.	Big, 57.0	57.0
`svcCatalogItemDefApiName`	String	API Name of the related Service Catalog Item Definition.	Big, 57.0	57.0
`svcCatalogRequestId`	String	ID of the related Service Catalog Request. See SvcCatalogRequest.	Big, 57.0	57.0

Service Process Request Layout Data

Service process layout data output.

Property Name	Type	Description	Filter Group and Version	Available Version
`data`	Map<String, Object>	Data from the related Service Catalog Request. See SvcCatalogRequest.	Big, 58.0	58.0
`groups`	Service Catalog Item Group[]	Data from related Service Catalog Item Groups.	Big, 58.0	58.0

Service Process Studio Connect API Use Cases

Use the Service Process Studio connect API use cases to invoke connect API resources to create and manage instances of particular service processes without using OmniStudio.

Transaction Dispute Management Use Case

Transaction dispute management provides a streamlined process for users to capture and submit customer disputes related to financial transactions. You can use the Service Process connect API resource to create all the records related to a transaction dispute.

Transaction Dispute Management Use Case

Transaction dispute management provides a streamlined process for users to capture and submit customer disputes related to financial transactions. You can use the Service Process connect API resource to create all the records related to a transaction dispute.

Transaction dispute management uses a dedicated data model with entities such as Dispute, mapping base attributes to fields in Dispute data model entities.

Note: The optional Assessment Questions portion of transaction dispute management isn't included in this use case.

Configure Objects, Permissions, and Mulesoft Integration

Before you can create transaction disputes using the Service Process connect API resource, you must create or modify objects, set user permissions, and connect to Mulesoft. Perform these tasks described in the *Financial Services Cloud Administration Guide*:

- Configure the Dispute Object
- Assign Transaction Dispute Management Permissions to User
- Connect to MuleSoft and Enable Integration
- Create an Integration Definition
- Add the Picklist Values Required for a Dispute Request
- Create a Transaction Dispute Service Process Definition with the Default Template
- Activate the Transaction Dispute Service Process (skip steps 3 and 4)

These tasks are optional but helpful for viewing Case records in your Salesforce org:

- Add Related Lists to the Page Layout
- Add the Case Details Lightning Component to the Case Record Page

Review the Dispute Management Objects and Fields

Transaction dispute management uses Dispute and Dispute Item records in addition to the Case and Document Checklist Item records common to all service processes. Setting values for the following fields is required. You can include additional fields.

- Dispute object — AccountId, ActualAmount, ApprovedAmount, AssessmentId, Description, DisputeSubtype, DisputeType, DisputedAmount, FinancialAccountId, ReceivedDate, Status
- Dispute Item object, one record for each disputed transaction — TransactionAmount, TransactionDate, TransactionDescription, TransactionIdentifier
- Case object — Subject, Origin, AccountId
- Document Checklist Item object — No requirements specific to transaction disputes

The TransactionIdentifier value typically references an ID in an external banking system. If you include the Case record's Type field, setting its value to Dispute is recommended. You can use Document Checklist Item fields to specify documentation such as bank statements or receipts.

Set Up the Service Process Request Payload

The Service Process on page 1839 POST payload has four top-level properties: `attributes`, `caseInfo`, `documentInfo`, and `svcCatalogItemDefApiName`. For the transaction dispute management process, certain attributes are mapped to specific objects:

- Under the `attributes` property, configure a `dispute_info` property for the Dispute record and a `disputed_transactions_info` property for the list of Dispute Item records.
- Configure `caseInfo` and `documentInfo` as you do for any service process.
- Set `svcCatalogItemDefApiName` to `Dispute_Management`.

Arrange the properties in JSON format as shown in the following example. Within this structure, all attributes are of type Text except for these fields:

- Amount Fields (type Number)
  - disputed_amount
  - transaction_amount
  - actual_amount
  - approved_amount
- Date Fields (type Date)
  - received_date
  - transaction_date

```
{
  "attributes": {
    "data": {
      "dispute_info": {
        "data": {
          "dispute_type": {
            "value": "Consumer Dispute"
          },
          "dispute_subtype": {
            "value": "Undelivered Product or Service"
          },
          "description": {
            "value": "Order from acmemerchant.com not delivered but credit card charged."

          },
          "received_date": {
            "value": "2023-07-14"
          },
          "account_id": {
            "value": "001DI000001o10QYAQ"
          },
          "assessment_id": {
            "value": "0U3DI000000018m0AA"
          },
          "financial_account_id": {
            "value": "a0EDI000000Ce6W2AS"
          },
          "actual_amount": {
            "value": 593.63
          },
          "disputed_amount": {
            "value": 400
          },
          "approved_amount": {
            "value": 100
          },
          "status": {
            "value": "Submitted"
          }
        }
```

```
      },
      "disputed_transactions_info": {
        "value": [
          {
            "transaction_date": "2023-01-01",
            "transaction_identifier": "1",
            "transaction_amount": 213.1,
            "transaction_description": "t1"
          },
          {
            "transaction_date": "2023-01-01",
            "transaction_identifier": "2",
            "transaction_amount": 150.94,
            "transaction_description": "t2"
          },
          {
            "transaction_date": "2023-01-01",
            "transaction_identifier": "3",
            "transaction_amount": 199.0,
            "transaction_description": "t3"
          },
          {
            "transaction_date": "2023-01-01",
            "transaction_identifier": "4",
            "transaction_amount": 30.59,
            "transaction_description": "t4"
          }
        ]
      }
    }
  },
  "caseInfo": {
    "data": {
      "Subject": {
        "value": "Julia Green Transaction Dispute Request"
      },
      "Origin": {
        "value": "Phone"
      },
      "AccountId": {
        "value": "001DI000001o10QYAQ"
      }
    }
  },
  "documentInfo": {
    "data": [
      {
        "id": "content document id-1",
        "name": "Julia Green credit card statement"
      },
      {
        "id": "content document id-2",
        "name": "acmemerchant.com receipt"
      }
```

```
    ]
  },
  "svcCatalogItemDefApiName": "Dispute_Management"
}
```

Invoke the Service Process Resource

After you assemble the payload, you're ready to invoke the Service Process resource using your favorite REST client. This resource creates all the object records related to a transaction dispute record and returns a response like this:

```
{
  "caseId": "500SM000000ecOLYAY",
  "caseNumber": "00001035",
  "svcCatalogRequestId": "946SM00000000CvYAI"
}
```

All records related to the transaction dispute directly or indirectly reference the Case record or the SvcCatalogRequest record.

CHAPTER 26 Timeline

In this chapter ...

- Timeline Standard Object
- Timeline Tooling API Object

The Timeline component shows key events relating to a person or a resource in one place, so your users can see information from a single source of truth.

SEE ALSO:

Salesforce Help: View Events Using Timeline in Salesforce

Timeline Standard Object

Use the standard object to translate timeline labels.

TimelineObjectDefinitionLocalization
Represents the translated value of a timeline configuration's master label when the Translation Workbench is enabled for your organization. This object is available in API version 60.0 and later.

TimelineObjectDefinitionLocalization

Represents the translated value of a timeline configuration's master label when the Translation Workbench is enabled for your organization. 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()`, `describeSObjects()`, `getDeleted()`, `getUpdated()`, `query()`, `retrieve()`, `update()`, `upsert()`

Special Access Rules

Translation Workbench must be enabled for your org.

Fields

Field	Details
`Language`	**Type** picklist **Properties** Create, Filter, Group, Restricted picklist, Sort **Description** The language of the translated label. Possible values are: • `af`—Afrikaans • `am`—Amharic • `ar`—Arabic • `ar_AE`—Arabic (United Arab Emirates) • `ar_BH`—Arabic (Bahrain) • `ar_DZ`—Arabic (Algeria) • `ar_EG`—Arabic (Egypt) • `ar_IQ`—Arabic (Iraq)

Field	Details
	• `ar_JO`—Arabic (Jordan) • `ar_KW`—Arabic (Kuwait) • `ar_LB`—Arabic (Lebanon) • `ar_LY`—Arabic (Libya) • `ar_MA`—Arabic (Morocco) • `ar_OM`—Arabic (Oman) • `ar_QA`—Arabic (Qatar) • `ar_SA`—Arabic (Saudi Arabia) • `ar_SD`—Arabic (Sudan) • `ar_SY`—Arabic (Syria) • `ar_TN`—Arabic (Tunisia) • `ar_YE`—Arabic (Yemen) • `bg`—Bulgarian • `bn`—Bengali • `bs`—Bosnian • `ca`—Catalan • `cac`—Chuj • `cak`—Kaqchikel • `cs`—Czech • `cy`—Welsh • `da`—Danish • `de`—German • `de_AT`—German (Austria) • `de_BE`—German (Belgium) • `de_CH`—German (Switzerland) • `de_LU`—German (Luxembourg) • `el`—Greek • `el_CY`—Greek (Cyprus) • `en_AE`—English (United Arab Emirates) • `en_AU`—English (Australian) • `en_BE`—English (Belgium) • `en_CA`—English (Canadian) • `en_CY`—English (Cyprus) • `en_DE`—English (Germany) • `en_GB`—English (UK) • `en_HK`—English (Hong Kong) • `en_IE`—English (Ireland) • `en_IL`—English (Israel)

Field	Details
	• en_IN—English (Indian) • en_IT—English (Italy) • en_MT—English (Malta) • en_MY—English (Malaysian) • en_NL—English (Netherlands) • en_NZ—English (New Zealand) • en_PH—English (Phillipines) • en_SG—English (Singapore) • en_US—English • en_ZA—English (South Africa) • eo—Esperanto (Pseudo) • es—Spanish • es_AR—Spanish (Argentina) • es_BO—Spanish (Bolivia) • es_CL—Spanish (Chile) • es_CO—Spanish (Colombia) • es_CR—Spanish (Costa Rica) • es_DO—Spanish (Dominican Republic) • es_EC—Spanish (Ecuador) • es_GT—Spanish (Guatemala) • es_HN—Spanish (Honduras) • es_MX—Spanish (Mexico) • es_NI—Spanish (Nicaragua) • es_PA—Spanish (Panama) • es_PE—Spanish (Peru) • es_PR—Spanish (Puerto Rico) • es_PY—Spanish (Paraguay) • es_SV—Spanish (El Salvador) • es_US—Spanish (United States) • es_UY—Spanish (Uruguay) • es_VE—Spanish (Venezuela) • et—Estonian • eu—Basque • fa—Farsi • fi—Finnish • fr—French • fr_BE—French (Belgium) • fr_CA—French (Canadian)

Field	Details
	• `fr_CH`—French (Switzerland) • `fr_LU`—French (Luxembourg) • `fr_MA`—French (Morocco) • `ga`—Irish • `gu`—Gujarati • `haw`—Hawaiian • `hi`—Hindi • `hmn`—Hmong • `hr`—Croatian • `ht`—Haitian Creole • `hu`—Hungarian • `hy`—Armenian • `in`—Indonesian • `is`—Icelandic • `it`—Italian • `it_CH`—Italian (Switzerland) • `iw`—Hebrew • `iw_EO`—Esperanto RTL (Pseudo) • `ja`—Japanese • `ji`—Yiddish • `ka`—Georgian • `kk`—Kazakh • `kl`—Greenlandic • `km`—Khmer • `kn`—Kannada • `ko`—Korean • `lb`—Luxembourgish • `lt`—Lithuanian • `lv`—Latvian • `mi`—Te reo • `mk`—Macedonian • `ml`—Malayalam • `mr`—Marathi • `ms`—Malay • `mt`—Maltese • `my`—Burmese • `nl_BE`—Dutch (Belgium) • `nl_NL`—Dutch

Field	Details
	• no—Norwegian • pa—Punjabi • pl—Polish • pt_BR—Portuguese (Brazil) • pt_PT—Portuguese (European) • quc—Kiche • rm—Romansh • ro—Romanian • ro_MD—Romanian (Moldova) • ru—Russian • ru_AM—Russian (Armenia) • ru_BY—Russian (Belarus) • ru_KG—Russian (Kyrgyzstan) • ru_KZ—Russian (Kazakhstan) • ru_LT—Russian (Lithuania) • ru_MD—Russian (Moldova) • ru_PL—Russian (Poland) • ru_UA—Russian (Ukraine) • sh—Serbian (Latin) • sh_ME—Montenegrin • sk—Slovak • sl—Slovene • sm—Samoan • sq—Albanian • sr—Serbian (Cyrillic) • sv—Swedish • sw—Swahili • ta—Tamil • te—Telugu • th—Thai • tl—Tagalog • tr—Turkish • uk—Ukrainian • ur—Urdu • vi—Vietnamese • xh—Xhosa • zh_CN—Chinese (Simplified) • zh_HK—Chinese (Hong Kong)

Field	Details
	• `zh_MY`—Chinese (Malaysia) • `zh_SG`—Chinese (Singapore) • `zh_TW`—Chinese (Traditional) • `zu`—Zulu
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix that is associated with this object. Each Developer Edition org that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the `namespacePrefix__componentName` notation. The namespace prefix can have one of the following values. • In Developer Edition orgs, NamespacePrefix is set to the namespace prefix of the org for all objects that support it, unless 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 org of the package developer. • In orgs that are not Developer Edition orgs, NamespacePrefix is set only for objects that are part of an installed managed package. All other objects have no namespace prefix.
`ParentId`	**Type** reference **Properties** Create, Filter, Group, Sort **Description** The ID of the related timeline configuration. This field is a relationship field. This field is a relationship field. **Relationship Name** Parent **Relationship Type** Lookup **Refers To** TimelineObjectDefinition
`Value`	**Type** textarea **Properties** Create, Filter, Sort, Update

Field	Details
	Description The translated master label of the timeline configuration.

Timeline 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**.

TimelineObjectDefinition
Represents the timeline configurations. This object is available in API version 55.0 and later.

TimelineObjectDefinition

Represents the timeline configurations. This object is available in API version 55.0 and later.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Supported SOAP API Calls

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

Supported REST API Methods

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

Fields

Field	Details
`BaseObject`	**Type** picklist **Properties** Filter, Group, Restricted picklist, Sort **Description** The object on which a timeline is based. Information displayed in a timeline comes from objects that are related to the base object. The base object can be any Salesforce object, standard or custom.
`Definition`	**Type** textarea

Field	Details
	Properties Create, Update **Description** The timeline definition stored in JSON format.
`DeveloperName`	**Type** string **Properties** Filter, Group, Sort **Description** The developer name of the timeline.
`FullName`	**Type** string **Properties** Create, Group, Nillable **Description**
`IsActive`	**Type** boolean **Properties** Defaulted on create, Filter, Group, Sort **Description** Indicates whether the timeline is active. The default value is `false`.
`Language`	**Type** picklist **Properties** Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort **Description** The language of the timeline object definition. Possible values are: • `da`—Danish • `de`—German • `en_US`—English • `es`—Spanish • `es_MX`—Spanish (Mexico) • `fi`—Finnish • `fr`—French

Field	Details
	• `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)
`ManageableState`	**Type** picklist **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Possible values are: • `beta`—Managed-Beta • `deleted`—Managed-Proposed-Deleted • `deprecated`—Managed-Proposed-Deprecated • `deprecatedEditable`—SecondGen-Installed-Deprecated • `installed`—Managed-Installed • `installedEditable`—SecondGen-Installed-Editable • `released`—Managed-Released • `unmanaged`—Unmanaged
`MasterLabel`	**Type** ManageableState enumerated list **Properties** Filter, Group, Nillable, Restricted picklist, Sort **Description** Indicates the manageable state of the specified component that is contained in a package: • `beta` • `deleted` • `deprecated` • `deprecatedEditable` • `installed` • `installedEditable`

Field	Details
	• `released` • `unmanaged`
`Metadata`	**Type** TimelineObjectDefinition **Properties** Create, Nillable, Update **Description** The timeline object definition's metadata.
`NamespacePrefix`	**Type** string **Properties** Filter, Group, Nillable, Sort **Description** The namespace prefix associated with this object. Each Developer Edition organization that creates a managed package has a unique namespace prefix. Limit: 15 characters. You can refer to a component in a managed package by using the ***`namespacePrefix__componentName`*** notation. The namespace prefix can have one of the following values: • In Developer Edition organizations, the namespace prefix is set to the namespace prefix of the organization for all objects that support it. There is an exception if an object is in an installed managed package. In that case, the object has the namespace prefix of the installed managed package. This field's value is the namespace prefix of the Developer Edition organization of the package developer. • 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.

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.

TimelineObjectDefinitionChangeEvent (API version 60.0)
Change events are available for the object.